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Preface

The *Supplement* is a major resource for data on our nation's social insurance and welfare programs. The majority of the statistical tables present information about programs administered by the Social Security Administration—the Old-Age, Survivors, and Disability Insurance programs, known collectively as Social Security, and the Supplemental Security Income program. In addition, data are presented on the major health care programs—Medicare and Medicaid—and income maintenance programs, including Workers' Compensation, Unemployment Insurance, Temporary Disability Insurance, Black Lung benefits, veterans' benefits, Food Stamps, Temporary Assistance for Needy Families, and Low-Income Home Energy Assistance. The *Supplement* also includes program summaries and legislative histories that help users of the data understand these programs.

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

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

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

This report is available on our Web site at <http://www.socialsecurity.gov/policy>. For additional copies, please telephone 202-358-6274 or e-mail op.publications@ssa.gov.

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Associate Commissioner
for Research, Evaluation, and Statistics

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Social Security (OASDI)

Employment and Earnings

Workers in OASDI covered employment, 2002	152.8 million
Average earnings, 2002	\$32,466
Earnings required in 2003 for—	
1 quarter of coverage	\$890
Maximum of 4 quarters of coverage	\$3,560
Earnings test exempt amounts for 2003	
Under full retirement age for entire year	\$11,520
For months before reaching full retirement age in 2003	\$30,720
Beginning with month of reaching full retirement age in 2003	Test eliminated

Program Data

Cost-of-living adjustment for December 2002	1.4 percent
Average monthly benefit, December 2002	
Retired workers	\$895
Widows and widowers, nondisabled	\$861
Disabled workers	\$834
Number of beneficiaries, December 2002	
Old-Age, Survivors, and Disability Insurance	46.4 million
Old-Age Insurance	
Total	32.3 million
Retired workers	29.2 million
Survivors Insurance	
Total	6.9 million
Widows and widowers, nondisabled	4.6 million
Disability Insurance	
Total	7.2 million
Disabled workers	5.5 million
Benefit payments, 2002	
Old-Age, Survivors, and Disability Insurance	\$453.8 billion
Old-Age and Survivors Insurance	\$388.1 billion
Disability Insurance	\$65.7 billion
Administrative expenses, 2002	
Old-Age and Survivors Insurance	
Amount	\$2.1 billion
As a percentage of total benefits paid	0.6 percent
Disability Insurance	
Amount	\$2.0 billion
As a percentage of total benefits paid	3.1 percent

Program Trends

- About 46.4 million persons received Social Security benefits for December 2002, an increase of 567,000 (1.2 percent) since December 2001. Seventy percent were retired workers and their spouses and children, and another 15 percent were survivors of deceased workers. Sixteen percent were disabled workers and their spouses and children.
- Seventy-two percent of the 29.2 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (75 percent) than men (69 percent) received reduced benefits.
- The number of beneficiaries aged 65 or older rose from 31.9 million in 1997 to 33.2 million in 2002 (4.1 percent). Beneficiaries aged 85 or older increased at a greater rate during the 5-year period (10.2 percent) from 3,783,000 in 1997 to 4,170,000 in 2002. In 2002, 40,100 centenarians were receiving Social Security.
- More than 19 million women aged 65 or older received benefits for December 2002. About 7.2 million (37.2 percent) were entitled solely to a retired-worker benefit, and another 5.7 million (29.4 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit. About 6.4 million (33.3 percent) were receiving wife's or widow's benefits only.
- Over 3 million children under age 18 received benefits, including 1,350,500 children of deceased workers, 1,422,000 children of disabled workers, and 270,200 children of retired workers.
- About 6.5 million persons received benefits based on disability—5,544,000 disabled workers, 744,500 disabled adult children, and 207,400 disabled widows and widowers. In addition, 151,600 spouses and 1,466,200 minors and student children of disabled workers received benefits.
- The leading causes of disability for disabled workers were mental disorders other than mental retardation (28 percent), and musculoskeletal conditions (24 percent). About 10 percent had circulatory conditions, and an additional 10 percent had diseases of the nervous system and sense organs.
- Average monthly benefits for December 2002, including the 1.4 percent COLA increase, were \$895 for retired workers, \$834 for disabled workers, and \$861 for nondisabled widows and widowers. Among retired workers, benefits averaged \$1,008 for men and \$774 for women. For disabled workers, average benefits were \$935 for men and \$709 for women.
- Average monthly family benefits for December 2002 were \$1,614 for a widowed mother or father and children; \$1,401 for a disabled worker, wife, and children; and \$1,769 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2002 were \$453.8 billion. Payments from the OASI trust fund were \$388.1 billion—an increase of 4.2 percent from the \$372.3 billion paid in 2001.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 10.2 percent from \$59.6 billion in 2001 to \$65.7 billion in 2002.
- OASDI benefit awards in calendar year 2002 totaled 4,335,700, including 1,812,600 to retired workers, 433,900 to their spouses and children and 873,900 to survivors of insured workers. Benefits were awarded to 750,000 disabled workers and to 465,400 of their spouses and children.

Supplemental Security Income

Annual Payment Adjustments

Monthly federal benefit rate, effective January 2003	
Individual living in his or her own household	\$552
Couple with both members eligible	\$829
Cost-of-living adjustment	1.4 percent

Program Data

Total	
Benefits paid in 2002	\$34.6 billion
Number of recipients, December 2002	6.9 million
Average benefit, December 2002	\$408.64
Federally administered payments	
Benefits paid in 2002	\$33.7 billion
Number of recipients, December 2002	6.8 million
Average benefit, December 2002	\$407.42
Federal SSI payments	
Benefits paid in 2002	\$29.9 billion
Number of recipients, December 2002	6.5 million
Average benefit, December 2002	\$376.76
Federally administered state supplementation	
Benefits paid in 2002	\$3.8 billion
Number of recipients, December 2002	^a 2.5 million
Average benefit, December 2002	\$127.53
State-administered supplementation	
Benefits paid in 2002	\$0.8 billion
Number of recipients, December 2002	^b 0.6 million
Average benefit, December 2002	\$110.62

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

b. Includes 151,989 persons receiving state supplementation only.

Program Trends

- In December 2002, 6,787,900 persons received federally administered SSI payments—99,400 more than the previous year. Of the total, 1,995,300 (29.4 percent) were aged 65 or older; 3,877,800 (57.1 percent) were blind or disabled aged 18-64; and 914,800 (13.5 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18-64 rose by 66,300 (1.7 percent) between December 2001 and December 2002, while the number under age 18 increased by 33,000 (3.7 percent).
- During 2002, 818,100 persons were awarded federally administered payments, an increase of 6.2 percent from the previous year. Of the 2002 awards, 533,500 went to blind or disabled recipients aged 18-64, 169,100 to those blind or disabled under age 18, and 115,500 to recipients aged 65 or older.
- Total SSI payments were \$34.6 billion in 2002, up 4.6 percent from 2001. Federal SSI payments in 2002 were \$29.9 billion (an increase of 4.2 percent over the previous year). Federally administered state supplementation totaled \$3.8 billion (an increase of 10.4 percent); state-administered supplementation totaled \$848.0 million, a decrease of 5.3 percent from the previous year's totals.
- In 2002, 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 recipients between the ages of 18 and 64, 22.8 percent had mental retardation as the primary diagnosis, and 34 percent were diagnosed with another mental disorder. These conditions were also the most frequent diagnoses for blind or disabled under age 18.

Health Care

Medicare

Total benefits paid in calendar year 2002	
Hospital Insurance (Part A)	\$149.9 billion
Supplementary Medical Insurance (Part B)	\$111.0 billion
Number of enrollees in July 2002 (one or both of Parts A and B)	40.5 million
Aged	34.7 million
Disabled	5.8 million
Administrative costs, 2002	
Hospital Insurance	
Amount	\$2.6 billion
As a percentage of total benefits paid	1.7 percent
Supplementary Medical Insurance	
Amount	\$2.2 billion
As a percentage of total benefits paid	2.0 percent

Medicaid

Medical service expenditures in fiscal year 2000	\$168.3 billion
Number of unduplicated recipients, fiscal year 2000	42.8 million
Average 2000 vendor payment per unduplicated recipient	
Persons aged 65 or older	\$11,929
Permanently and totally disabled persons	\$10,559
Dependent children under age 21	\$1,358
Average 2000 vendor payment for medical services	
Nursing facility services	\$20,220
Inpatient general hospital care	\$4,919
Prescribed drugs	\$975
Physicians services	\$356

Other Social Insurance Programs and Veterans' Benefits

Unemployment Insurance

Total payments, 2002	\$42.1 billion
Average—	
Weekly benefit amount (regular programs)	\$257
Duration of benefits	16.5 weeks
Weekly insured unemployment	3.6 million
Covered employment	126.5 million

Workers' Compensation

Benefit payments, 2001	\$49.4 billion
Compensation payments	\$27.4 billion
Medical and hospitalization	\$22.0 billion
Benefits paid by—	
Private insurance carriers	\$27.1 billion
State and federal funds	\$11.0 billion
Employers' self-insurance	\$11.3 billion
Covered workers per month	127.0 million
Costs as a percentage of covered payroll	1.39 percent

Temporary Disability Insurance ^a

Average weekly benefit, 2000	
California ^b	
State fund	\$256
Private plans	\$399
New York	
State fund	\$146
Private plans	\$185

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

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

(Continued)

Black Lung Benefits

Basic benefit to miner or widow	\$534.60
Maximum family benefit	\$1,069.20
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2002	71,600
Total benefits paid, calendar year 2002	\$439.3 million
Part C (claims filed July 1, 1973, or later)	
Total benefits paid, fiscal year 2002	
Disability and survivors benefits	\$320.0 million
Medical benefits	\$64.2 million

Veterans' Benefits

Number of veterans with disability compensation or pension, 2002	
Service-connected disability	2,398,000
Non-service-connected disability	347,000
Monthly payment in 2003 for—	
Service-connected disability	
10 percent disability	\$104
Total disability	\$2,193
Non-service-connected disability (maximum payment)	
Without dependent	\$807
With one dependent and in need of aid and attendance	\$1,597

Public Assistance Programs

Temporary Assistance for Needy Families

Total payments, 2002	\$10.1 billion
Average monthly number of—	
Recipients	5.1 million
Families	2.1 million
Average monthly payment	
Per recipient	\$167
Per family	\$412

Food Stamps

Monthly benefits, beginning October 1, 2003	
Four-person household with no income	\$471
Standard deduction (one-person to four-person households)	\$134
Fiscal year 2002	
Average number of participants	19.1 million
Total benefits	\$18.3 billion

Low-Income Home Energy Assistance

(Funds issued by the Department of Health and Human Services in fiscal year 2001.)

Block grants to—	
50 states and the District of Columbia	\$1.36 billion
Puerto Rico, Virgin Islands, American Samoa, Guam, and Northern Mariana Islands	\$1.9 million
Direct block grants to 128 Indian tribes and tribal organizations	\$12.5 million
Leveraging incentive awards to—	
37 states	\$19.2 million
30 Indian tribes and tribal organizations	\$1.4 million
Residential Emergency Assistance Challenge (REACH) program awards to—	
5 states	\$4.5 million
8 Indian tribes and tribal organizations	\$1.2 million
Emergency contingency funds to—	
50 states and the District of Columbia	\$451 million
128 Indian tribes and tribal organizations	\$4.0 million

Poverty Data

Weighted average poverty thresholds, 2002	
Individual, aged 65 or older	\$8,628
Couple, householder aged 65 or older	\$10,885
Family of four	\$18,392
Percentage of population with income below poverty level, 2001	
All ages	11.7 percent
Children under age 18 living in families	15.7 percent
Persons aged 65 or older	10.1 percent

Program Descriptions and Legislative History

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

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

At the end of December 2002, 46.4 million people were receiving benefits at a rate exceeding \$37 billion each month (over \$454 billion annually). According to the latest Social Security Trustees Report, these cash benefits comprised 4.4 percent of the nation's gross domestic product. During the same year, approximately 153 million employees and self-employed workers, along with employers, contributed \$532.5 billion to the OASDI trust funds—through which contributions are credited and benefits are paid.

Social Security benefits are essential to the economic well-being of millions of individuals. Social Security pays benefits to 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 65 percent of the beneficiaries. It contributes 90 percent or more of income for one-third of the beneficiaries and is the only source of income for 20 percent of them.

Contributions and Trust Funds

A person contributes to Social Security either through payroll taxes or self-employment taxes under the Federal Insurance Contributions Act (FICA) or the Self-Employed Contributions Act (SECA). Employers match the employee contribution, while self-employed workers pay an amount equal to the combined employer-employee contributions. (Self-employed workers receive a special tax deduction to ease the impact of paying the higher rate.) There is a maximum yearly amount of earnings subject to OASDI taxes, \$87,000 in 2003. There is no upper limit on taxable earnings for Medicare Hospital Insurance. Employees whose contributions exceed the maximum taxable amount because they worked for more than one employer can receive refunds of excess FICA payments when they file their tax returns.

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

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

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

Structure and Organization

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

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

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

Significant Program Changes

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

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

Elimination of Annual Earnings Test for Persons Reaching Full Retirement Age

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

The earnings limit that applies in the year of attainment of FRA is based on the limits previously established for persons at FRA through age 69—\$30,000 in 2002, and \$30,720 in 2003. Benefits are withheld at the rate of \$1 for every \$3 of earnings above these exempt amounts. In determining earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. The legislation also permits retired workers to earn delayed retirement credits for any months between the attainment of full retirement age and age 70 for which the worker requests that benefits not be paid.

Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continued to be pegged to increases in the average wage. This amount increased from \$11,280 in 2002 to \$11,520 in 2003. Withholding for beneficiaries subject to this earnings test is at \$1 for each \$2 of earnings over the exempt amounts. Proposed rules were published August 25, 2003.

Work Incentives Improvement Act

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

The Ticket to Work provisions of this legislation are being phased in over a 3-year period. The Ticket to Work will emphasize and encourage rehabilitation efforts and will

pay private employment service providers for helping beneficiaries achieve specific work-related goals. These providers are called Employment Networks. Most disability beneficiaries will receive a Ticket that they may use to obtain vocational rehabilitation, job training, or other support services. Individuals may take their ticket to any of the Employment Networks that offer services in their communities, or to the State Vocational Rehabilitation Agency. During the first phase, which began in February 2002, SSA distributed tickets to beneficiaries in 13 states. In the second phase, which began in November 2002, SSA distributed tickets to beneficiaries in 20 more states and the District of Columbia. And during the third phase, which is scheduled to begin in November 2003, SSA will distribute tickets in the remaining 17 states, along with American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the Virgin Islands. Also beginning January 1, 2001, former beneficiaries may have their benefits resumed if the benefits were terminated because of work, their work activity ends within 5 years of the month their benefits stopped and they are still disabled.

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

Effective July 1, 1999, the Social Security Administration raised from \$500 to \$700 the amount of monthly earnings for a nonblind disabled individual to be considered engaging in substantial gainful activity (SGA). Effective January 1, 2001, the top SGA level was raised to \$740 per month, with the provision that ongoing SGA levels will be automatically adjusted annually based on increases in the national average wage index. Effective January 1, 2003, the level is \$800 per month.

The SGA threshold is part of the definition of disability that requires an individual to be unable to engage in substantial gainful activity to be eligible for benefits. Earnings of more than the top SGA level will ordinarily demonstrate that an individual is engaged in SGA. Earnings of less than \$800 per month will ordinarily demonstrate that an individual is not engaged in SGA.

A different definition of SGA applies to blind persons receiving Social Security disability benefits. Increases in the SGA amount for blind individuals have long been pegged to increases in the national average wage index and thus were not affected by the 1999 or subsequent rule changes. The level for blind individuals increased from \$1,300 in 2002 to \$1,330 in 2003.

New rules also affect the trial work period (TWP). The TWP allows disability beneficiaries to test their ability to work for at least 9 months. During the TWP, beneficiaries may earn any amount and still receive full benefits. The monthly level at which earnings count toward the 9-month TWP was raised from \$200 to \$530 effective January 1, 2001, with future increases pegged to the national average wage index. Effective January 1, 2003, the level is \$570.

After completion of 9 trial work months, the SGA level is used to determine whether earnings are substantial or not. If earnings fall below the SGA level, full benefits generally continue. If earnings are higher than the SGA level, cash benefits are usually suspended while medical benefits continue.

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

Coverage and Financing

In 2003, about 153 million persons will work in employment or self-employment covered under the OASDI program. In recent years, coverage has become nearly universal for work performed in the United States, including American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands. Approximately 96 percent of the American workforce are covered by OASDI. Workers excluded from coverage fall into five major categories:

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

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

For most employees, taxes are withheld from wages beginning with the first dollar earned. The exceptions are domestic employees, election workers, and agricultural workers. In 2003, a domestic employee must earn \$1,400 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,200 in 2003 before FICA is withheld. Most agricultural workers wages are covered if the employer pays more than \$2,500 in total wages in a year or if the individual worker earns over \$150 in a year from a single employer.

Employees, their employers, and the self-employed each pay taxes on earnings in covered employment and self-employment up to an annual maximum taxable amount for OASDI. There is no upper limit on taxable earnings for Medicare Hospital Insurance (HI). The OASDI maximum taxable amount—\$87,000 in 2003—is updated automatically each year in relation to increases in the national average annual wage. The current FICA tax rate applicable to both employees and employers is 6.2 percent for OASDI (5.30 percent for OASI and 0.9 percent for DI) and 1.45 percent for HI.

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

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

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

Insured Status

To become eligible for his or her benefit and benefits for family members or survivors, a worker must earn a minimum number of credits based on work in covered employment or self-employment. These credits are described as quarters of coverage. In 2003, a quarter of coverage (QC) is credited for each \$890 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$3,560 or more in 2003 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 auto-

matically each year in proportion to increases in the average wage level.

Fully Insured

Eligibility for most types of benefits requires that the worker be fully insured. To be fully insured a worker must have a number of QCs at least EQUAL to the number of calendar years elapsing between age 21 (or 1950 if later) and the year in which he or she reaches age 62, becomes disabled, or dies—whichever occurs first. Under this requirement, workers who reach age 62 in 1991 or later need the maximum number of 40 QCs to be fully insured. For workers who become disabled or die before age 62, the number of QCs needed for fully insured status depends on their age at the time the worker becomes disabled or dies. A minimum of 6 QCs is required regardless of age.

Currently Insured

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

Disability Insured

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

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

International Agreements

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

Social Security agreements and supplementary agreements, effective dates

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

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

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

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

Benefit Computation and Automatic Adjustment Provisions

PIA Computation

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

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

Table 2.A8 shows the indexing factors applicable to the earnings of workers who were first eligible in 1990–2003. **Table 2.A9** shows indexed earnings for workers first eligible in 1996–2003 who had maximum taxable earnings in each year after 1950. For a detailed description of an AIME computation, see Appendix D, "Computing a Retired-Worker Benefit."

2. Determining AIME. The period used to calculate AIME equals the number of full calendar years elapsing between age 21 (or 1950, if later) and the year of first eligibility, usually excluding the lowest 5 years. Workers disabled before age 47 have from zero to 4 excluded years from the computation. At an absolute minimum, 2 years are used to compute AIME. The actual years used in the computation (the "computation years") are the years of highest indexed earnings after 1950, including any years before age 22 or after age 61 as well as the year of disability or death. AIME is calculated as the sum of indexed earnings in the computation period, divided by the number of months in that period.

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

3. Computing the PIA. The formula used to compute the PIA from AIME is weighted to provide a higher PIA-to-AIME ratio for workers with comparatively low earnings. The formula applies declining percentage conversion rates to three AIME brackets. For workers who reach age 62, become disabled, or die in 2003, the formula provides a PIA equal to the sum of:

90 percent of the first \$606 of AIME, plus
32 percent of the next \$3,047 of AIME, plus
15 percent of AIME over \$3,653.

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

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

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

The benefit formula applicable to a worker depends on the year of eligibility (or death) rather than on the year benefits are first received. Thus the PIA of a worker retiring at FRA in 2003 is calculated using the benefit formula that applies to all workers first eligible in 2000 (the "year of attainment" of age 62). The PIA derived from that formula is then increased by the COLAs effective for December, 2000, 2001 and 2002 to obtain the PIA effective at FRA. Subsequent recomputations of the worker's benefit, including additional earnings not originally considered, delayed retirement credits or additional COLA increases, all refer to the basic computation that originally applied, based on the year of attainment.

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

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

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

Table 2.A18 presents a history of provisions relating to the automatic adjustment of benefits, including a description of the stabilizer provision. In addition, the Table includes a summary history and description of provisions relating to the annual automatic adjustment of (1) the maximum amount of taxable and creditable earnings, (2) the dollar amount needed to establish a quarter of coverage, (3) the bend points defining the AIME brackets in the PIA formula and the PIA brackets in the maximum family benefit formula, and (4) the exempt amounts under the earnings (retirement) test.

All of these adjustments are linked to increases in the level of the national average annual wage, rather than to increases in the CPI. **Table 2.A19** illustrates the cumulative effect of statutory and automatic increases in benefits for workers who have been in benefit status over varying time periods.

Alternative PIA Computation Provisions

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

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

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

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

Example: A retired worker with a noncovered pension of \$2,000 a month and less than 20 years of covered employment attains age 62 in 2003.

Normal PIA, based on AIME of \$800.

$$\$606 \times .90 = \$545.40$$

$$\$194 \times .32 = \$62.08$$

$$\text{PIA} = \$607.40$$

WEP PIA, based on AIME of \$800.

$$\$606 \times .40 = \$242.40$$

$$\$194 \times .32 = \$62.08$$

$$\text{PIA} = \$304.40$$

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

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

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

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

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

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

Benefit Types and Levels

Retired and Disabled Workers

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

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

For workers who postpone their retirement beyond the full retirement age, benefits are increased for each month of nonpayment beyond that age and age 70. This increase is called a "delayed retirement credit," and is potentially available for any or all months following attainment of the full retirement age (maximum of 60 months for persons who attained age 65 prior to 2003). The annual rate of increase for delayed retirement credits is 7 percent for workers who reach age 62 in 2002, and 7 1/2 percent for workers who reach age 62 in 2003 and 2004. The rate will rise to 8 percent for workers reaching age 62 in 2005 or later.

Spouses and Children of Workers

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

retirement age (FRA) for spouses attaining age 62 in that year.

Children of retired or disabled workers are also eligible to receive monthly benefits. The term "child" refers to a child under the age of 18, a child aged 18–19 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). As with retired workers and spouses, widow(er)s' FRA will gradually increase to age 67. Widows and widowers can elect reduced monthly benefits at age 60 or, if disabled, as early as age 50. Surviving divorced spouses can also receive benefits if married to the worker for at least 10 years and not remarried before age 60 (age 50 if disabled).

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

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

alive. Disabled widow(er)s ages 50–60 receive the age 60 widow's rate (71.5 percent of PIA) regardless of their age at the time of entitlement.

Children of deceased workers and mothers and fathers under FRA are eligible to receive monthly benefits up to 75 percent of the worker's PIA if the worker died either fully or currently insured. Mothers and fathers must be caring for the worker's entitled child who is either under age 16 or disabled. A dependent parent aged 62 or older is eligible for monthly benefits equal to 82.5 percent of the worker's PIA. Each of two dependent parents can qualify for benefits equal to 75 percent of the deceased worker's PIA. Monthly benefits payable to survivors are reduced to conform to the family maximum benefit payable on the deceased worker's account. Benefits for a surviving divorced spouse, however, are disregarded when computing the maximum family benefit.

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

Provisions for Railroad Retirement Board Beneficiaries

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

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

Public Law 107-90 (the 2001 amendments to the Railroad Retirement Act of 1974) effective January 1, 2002, revised the railroad service work requirement. The railroad service work requirement is 10 or more years of railroad

service or, effective January 1, 2002, at least 5 years of railroad service after December 31, 1995. The two components are unchanged:

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

Effect of Current Earnings on Benefits

Beneficiaries under the full retirement age (FRA) with earnings in excess of certain exempt amounts may have all or part of their benefits withheld as a result of the annual earnings test (AET) provisions of the Social Security Act. For those at or above FRA, however, there have been recent changes to AET provisions. Amendments in 1996 eased the impact of AET provisions, while changes in 2000 removed the AET altogether for beneficiaries FRA or older. Public Law 104-121, enacted March 29, 1996, substantially raised the exempt amounts under the annual earnings test for persons who have reached full retirement age. These amounts are \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. After 2002, the annual exempt amount is indexed to the growth in average wages. In 2003, the indexed amount is \$30,720. Benefits are withheld at the rate of \$1 in benefits for every \$3 of earnings above the FRA exempt amount. Public Law 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches FRA. In determining annual earnings for purposes of the annual earnings test, only earnings before the month of attainment of FRA will be counted.

Public Laws 104-121 and 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year. This annual amount continues to be pegged to increases in average wages. The amount was \$11,280 in 2002 and is \$11,520 in 2003. When the annual earnings limit affects working beneficiaries under FRA, benefits are withheld at the rate of \$1 for every \$2 of earnings above the exempt amount.

Individuals have the option to receive reduced benefits under a monthly earnings test if it is to their advantage to do so. This option is usually exercised in the first year of retirement, because in that year the monthly test permits payment for some months even if the annual earnings limit is greatly exceeded. Under the monthly test, beneficiaries receive a full monthly benefit for months in which they do not earn over an amount equal to 1/12 of the annual earn-

ings limit. The monthly earnings test is applied to the self-employed based on hours they work instead of monthly earnings. Generally, beneficiaries are eligible for the monthly earnings test in only one year.

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

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

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

Taxation of Benefits

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

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

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

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

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Supplemental Security Income

Program Overview

The Supplemental Security Income (SSI) program provides income support to persons aged 65 or older, blind or disabled adults, and blind or disabled children. Eligibility requirements and federal payment standards are nationally uniform. The 2003 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$552 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$829 monthly.

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

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

The federal payment is based on the individual's countable income. The first \$20 monthly in OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 monthly of earnings plus one-half of any earnings above \$65. For example, a person living in his or her own household, whose sole income is a \$200 monthly OASDI benefit, would receive \$372 in federal SSI payments:

$$\$552 - (\$200 - \$20) = (\$552 - \$180) = \$372.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$344.50 in federal SSI payments:

$$\begin{aligned} ((\$500 - \$85) / 2) &= \$207.50 \text{ countable earnings} \\ \text{FBR } \$552 - \$207.50 &= \$344.50 \text{ federal SSI} \end{aligned}$$

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, and household goods and personal effects of reasonable value. States have the option to supplement the federal SSI payment for all or selected categories of persons, regardless of previous state program eligibility.

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SSI: History Of Provisions

Basic Eligibility Requirements

1972 (Public Law 92-603, enacted October 30). An individual may qualify for payments on the basis of age, blindness, or disability.

Aged: Any person aged 65 or older.

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

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

1973 (Public Law 93-233, enacted December 31). Only persons who had received APTD before July 1973 and were on the rolls in December 1973 may receive SSI on the basis of the state definition of disability; those who became eligible for state aid from July to December 1973 must meet the federal definition of disability.

1980 (Public Law 96-265, enacted June 9). A disabled recipient who loses federal SSI eligibility because of earnings at the substantial gainful activity level may continue to receive a special benefit under section 1619 and retain eligibility for Medicaid under Title XIX of the Social Security Act. This special benefit status may continue as long as the recipient has the disabling

impairment and meets all nondisability SSI eligibility criteria. states have the option of supplementing this special benefit.

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

1984 (Public Law 98-460, enacted October 9). The special benefit and Medicaid provisions of the 1980 legislation were extended through June 30, 1987 (retroactive to January 1, 1984).

1986 (Public Law 99-643, enacted November 10). The special benefit and Medicaid provisions of the 1980 amendments are made permanent. The provisions were amended effective July 1, 1987, with significant modifications to simplify administration and to allow free movement between regular SSI disability payments and either the special cash benefit or Medicaid eligibility under section 1619. The distinction between a disabled person eligible for regular SSI payments and one eligible for 1619(a) is that the latter has several months with gross earnings above the SGA level. Previously, section 1619(a) status required completion of a trial work period and the determination that the work was SGA.

1996 (Public Law 104-193, enacted August 22). For individuals under age 18, the “comparable severity” standard is eliminated and replaced with a requirement that a child be considered disabled if he/she has a medically determinable impairment that results in “marked and severe functional limitations,” and meets the existing statutory duration requirement. The law also eliminates references to “maladaptive behaviors” in the Listing of Impairments for children, and discontinues the use of individualized functional assessments for children.

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

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

Other Eligibility Provisions

Citizenship and Residence

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

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

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

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

1993 (Public Law 103-66, enacted August 10). Above provision made applicable where the parent is a member of the U.S. Armed Forces and stationed in Puerto Rico or the territories and possessions of the United States.

1996 (Public Law 104-193, enacted August 22). Prohibits SSI eligibility for anyone who is not a U.S. citizen or national unless they are in a “qualified alien” category and meet one of certain exceptions such as lawful permanent residents who earn or can be credited with 40 qualifying quarters of earnings, certain refugee type categories eligible for up to 5 years of time limited eligibility, or active duty U.S. military or 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.

(Public Law 104-208, enacted September 30). Amends Public Law 104-193 to add to the list of “qualified aliens” certain noncitizens (and their children) who have been battered or subjected to extreme cruelty by

a spouse or parent or a member of the spouse's or parent's family living in the same household.

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

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

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

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

1998 (Public Law 105-306, enacted October 28). Permanently extends eligibility of all remaining "nonqualified aliens" who were receiving SSI benefits when Public Law 104-193 was enacted on August 22, 1996.

2000 (Public Law 106-386, enacted October 28). Noncitizens, regardless of their immigration status, may be eligible for SSI to the same extent as refugees, if they are determined to be victims of "severe forms of trafficking in persons."

Other Benefits

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

Drug Addiction and Alcoholism (DA&A)

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

SSI payments are required to be made through a representative payee—another person or public or private

agency designated by SSA to manage the recipient's benefit on his/her behalf.

1994 (Public Law 103-296, enacted August 15). Any individual who is receiving SSI based on a disability where drug addiction or alcoholism is a contributing factor material to the finding of disability must comply with the DA&A treatment requirements. The individual must accept appropriate treatment when it is available and comply with the conditions and terms of treatment. Instances of noncompliance with the requirements result in progressively longer payment suspensions. Before payments can resume, the individual must demonstrate compliance for specific periods; 2 months, 3 months, and 6 months, respectively, for the first, second, third, and subsequent instances of noncompliance. An individual who is not in compliance with the DA&A treatment requirements for 12 consecutive months shall not be eligible for payments; however, this does not prevent such individuals from reapplying and again becoming eligible for payments.

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

Payments based on DA&A must be made to a representative payee. Preference is required to be given to community based nonprofit social service agencies and federal, state, or local government agencies in representative payee selection. These agencies when serving as payees for individuals receiving payments based on DA&A may retain the lesser of 10 percent of the monthly benefit or \$58 (indexed to the consumer price index (CPI)) as compensation for their services.

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

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

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

Institutionalization

1972 (Public Law 92-603, enacted October 30). An individual who is an inmate of a public institution is ineligible for SSI payments unless the institution is a facility approved for Medicaid payments and is receiving such payments on behalf of the person. Under *regulations*,

the Medicaid payment must represent more than 50 percent of the cost of services provided by the facility to the individual.

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

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

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

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

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

1996 (Public Law 104-193, enacted August 22). Effective December 1996, institutionalized children under age 18 whose private health insurance is making payments to the institution may receive no more than \$30 per month in federal SSI.

Vocational Rehabilitation and Treatment

1972 (Public Law 92-603, enacted October 30). Blind or disabled individuals receiving federal SSI benefits who are under age 65 must be referred to the state agency providing services under the Vocational Rehabilitation Act and must accept the services offered. States are reimbursed for the cost of services.

1976 (Public Law 94-566, enacted October 20). Blind or disabled children under age 16 must be referred to the state agency administering crippled children's services or to another agency designated by the state. States are reimbursed for the cost of services.

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

1980 (Public Law 96-265, enacted June 9). Disabled SSI recipients who medically recover while enrolled in approved vocational rehabilitation programs of state VR agencies may continue to receive benefits during their participation in such programs if the Commissioner of Social Security determines that continuation in the program will increase the probability that they leave the rolls permanently.

1981 (Public Law 97-35, enacted August 13). Funding no longer provided under Title XVI for medical, social, developmental, and rehabilitative services to disabled or blind children.

Reimbursement for the cost of rehabilitation services will only be made if the services result in the recipient's return to work for a continuous period of 9 months. The work must be at the substantial gainful activity earnings level.

1984 (Public Law 98-460, enacted October 9). Authorizes the reimbursement of states for the cost of VR services provided to individuals who (1) continue to receive benefits after medical recovery because they are participating in a state VR program or (2) refuse, without good cause, to continue in or cooperate with the VR program in which they had been participating.

1987 (Public Law 100-203, enacted December 22). Extends the provision for continuation of payments to disabled SSI recipients who have medically recovered while enrolled in an approved vocational rehabilitation program to include blind SSI recipients.

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

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

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

1999 (Public Law 106-170, enacted December 17). Establishes a Ticket to Work and Self-Sufficiency program that will provide SSI (and OASDI) disability beneficia-

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

ries with a ticket that can be used to obtain vocational rehabilitation services, employment services, or other support services, from an employment network (EN) of their choice.

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

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

The four milestones are based on gross earnings exceeding the substantial gainful activity level for specified months. An outcome payment month is any month in which SSA does not pay any federal cash disability cash benefits to a beneficiary because of work or earnings.

Continuing Disability Reviews and Eligibility Redeterminations

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

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

Requires a CDR:

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

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

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

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

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

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

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

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

Deeming of Income and Resources

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

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

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

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

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

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

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

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

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

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

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

Federal Benefit Rates

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

increases in the cost of living. Legislation affecting the level of federal benefit rates since the inception of the SSI program are summarized in Table 2.B1.

Windfall Offset

1980 (Public Law 96-265, enacted June 9). Offset (by reduction of retroactive Social Security benefits) to prevent persons whose initial OASDI payment is retroactive from receiving more in total benefits than if they were paid the benefits when regularly due.

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

Proration of Benefit

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

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

Retrospective Monthly Accounting

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

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

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

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

Uncashed Checks

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

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

Rounding of Payment Amounts

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

Penalties Resulting in Nonpayment of Benefits for False or Misleading Statements

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

Exclusions from Income

General Exclusions

1972 (Public Law 92-603, enacted October 30). The first \$60 of earned or unearned income per calendar quarter for an individual or couple; the next \$195 and one-half the remainder of quarterly earned income. Unearned income includes Social Security benefits, other government or private pensions, veterans' benefits, and workers' compensation.

1981 (Public Law 97-35, enacted August 13). The first \$20 of earned or unearned income per month for an individual or couple; the next \$65 and one-half the remainder of monthly earned income. Unearned income includes Social Security benefits, other government or private pensions, veterans' benefits, and workers' compensation.

2000 (Public Law 106-554, enacted December 21). Earnings of persons defined as Social Security statutory employees are treated as self-employment income for SSI purposes.

Special Exclusions

1972 (Public Law 92-603, enacted October 30). Any amount of tax rebate issued to an individual by any

public agency that is based on either real property or food purchase taxes.

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

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

Work expenses of blind persons.

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

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

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

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

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

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

1976 (Public Law 94-331, enacted June 30). Disaster assistance from income for 9 months and application of one-third reduction for 6 months for certain victims of disasters occurring between January 1, 1976, and December 31, 1976.

(Public Law 94-566, enacted October 20). Any assistance based on need (including vendor payments) made to or on behalf of SSI recipients, which is paid and wholly funded by state or local governments.

The value of assistance provided under certain federal housing programs.

1977 (Public Law 95-113, enacted September 29). Food stamps, federally donated food, and the value of free or reduced price food for women and children under the Child Nutrition Act and National School Lunch Act.

(Public Law 95-171, enacted November 12). Provisions for exclusions for support and maintenance under the Disaster Relief and Emergency Assistance Act of 1974 extended on a permanent basis. Effective January 1, 1978.

1980 (Public Law 96-222, enacted April 1). Earned income tax credit treated as earned income (temporarily excluded from 1975 through 1980).

(Public Law 96-265, enacted June 9). Remunerations received in sheltered workshops and work activity cen-

ters are considered earned income and qualify for earned income exclusions.

Impairment-related work expenses paid by the individual (including cost for attendant care, medical equipment, drugs, and services necessary to control an impairment) are deducted from earnings when determining if an individual is engaging in substantial gainful activity. Impairment-related work expenses are excluded in calculating income for benefit purposes if initial eligibility for benefits exists on the basis of countable income without applying this exclusion.

1981 (Public Law 97-35, enacted August 13). Modifies provision under which irregularly or infrequently received income is excluded to conform to change from quarterly to monthly accounting; amounts excludable: \$20 or less of unearned income and \$10 of earned income in a month.

1982 (Public Law 97-377, enacted December 21). From December 18, 1982, to September 30, 1983, certain home energy assistance payments are excluded if a state agency certified that they are based on need.

1983 (Public Law 97-424, enacted January 6). Support or maintenance assistance (including home energy assistance) provided in kind by a nonprofit organization or in cash or in kind by certain providers of home energy is excluded if the state determines that the assistance is based on need. Provision is applicable through September 1984.

Certain home energy assistance payments are excluded if a state agency certified that the assistance is based on need. Provision is applicable through June 1985.

1984 (Public Law 98-369, enacted July 18). The 1983 provisions for support and maintenance and home energy assistance continue to October 1, 1987.

1986 (Public Law 99-498, enacted October 17). Educational assistance used for educational expenses under the Higher Education Act of 1965 as amended.

1987 (Public Law 100-203, enacted December 22). The 1983 provisions for support and maintenance and home energy assistance made permanent.

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

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

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

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

Payments from the Agent Orange Settlement.

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

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

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

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

Payments received as state or local government relocation assistance.

Payments received under the Radiation Exposure Compensation Act.

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

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

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

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

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

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

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

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

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

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

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

Resources

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

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

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

General Exclusions

1972 (Public Law 92-603, enacted October 30). A home of reasonable value—established *by regulation* as not exceeding a fair-market value of \$25,000 (\$35,000 in Alaska and Hawaii).

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

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

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

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

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

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

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

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

ble burial arrangement) may be set aside for the burial of the recipient and spouse.

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

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

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

Real property that cannot be sold for the following reasons: it is jointly owned; its sale would cause the other owner(s) undue hardship 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).

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

Special Exclusions

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

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

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

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

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

Payments from the Agent Orange Settlement.

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

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

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

Payments received under the Radiation Exposure Compensation Act.

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

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

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

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

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

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

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

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

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

Transfer-of-Assets Penalties

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

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

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

Presumptive and Emergency Payments and Interim Assistance Reimbursement

Presumptive Payments

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

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

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

Emergency Advance Payments

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

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

1996 (Public Law 104-193, enacted August 22). Applicants who have a financial emergency may receive an emergency advance payment in the month of application, which, effective with this law, is always 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.

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

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

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

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

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

1987 (Public Law 100-203, enacted December 22). Effective July 1, 1988, restores or preserves the Medicaid eligibility of persons aged 60 or older who are eligible for Social Security benefits as widows or widowers (but not eligible for Medicare) and who become ineligible for SSI payments or state supplementation because of the receipt of old-age or survivors insurance benefits under Social Security.

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

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

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

State Supplementation

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

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

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

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

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

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

Overpayment Recovery

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

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

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

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

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

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

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

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

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

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Medicare

The following are brief summaries of complex subjects. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services or the Department of Health and Human Services (DHHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.³

Overview

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

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

Medicare has traditionally consisted of two parts: Hospital Insurance (HI), also known as Part A, and Supplementary Medical Insurance (SMI), also known as Part B. A new, third part of Medicare, sometimes known as Part C, is the Medicare+Choice program, which was established by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33) and which expanded beneficiaries' options for participation in private-sector health care plans. When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2003, over 41 million people are enrolled in one or both of Parts A and B of the Medicare program, and 5 million of them have chosen to participate in a Medicare+Choice plan.

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

Coverage

Hospital Insurance (HI) is generally provided automatically, and free of premiums, to persons age 65 or over who are eligible for Social Security or Railroad Retirement benefits, whether they have claimed these monthly cash benefits or not. Also, workers and their spouses with a sufficient period of Medicare-only coverage in federal, state, or local government employment are eligible beginning at age 65. Similarly, individuals who have been entitled to Social Security or Railroad Retirement disability benefits for at least 24 months, and government employees with Medicare-only coverage who have been disabled for more than 29 months, are entitled to HI benefits. HI coverage is also provided to insured workers with end-stage renal disease (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 2002, the HI program provided protection against the costs of hospital and specific other medical care to about 40 million people (34 million aged and 6 million disabled enrollees). HI benefit payments totaled \$149.9 billion in 2002.

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

- Inpatient hospital care coverage includes costs of a semi-private room, meals, regular nursing services, operating and recovery rooms, intensive care, inpatient prescription drugs, laboratory tests, X-rays, psychiatric hospitals, inpatient rehabilitation, and long-term care (LTC) hospitalization when medically necessary, as well as all other medically necessary services and supplies provided in the hospital. An initial deductible payment is required of beneficiaries who are admitted to a hospital, plus copayments for all hospital days following day 60 within a benefit period (described later).
- Skilled nursing facility (SNF) care is covered by HI only if it follows within 30 days (generally) of a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital but also include rehabilitation services and appliances. The number of SNF days provided under Medicare is limited to 100 days per benefit period (described later), with a copayment required for days 21–100. HI does not cover nursing facility care if the patient does not require skilled nursing or skilled rehabilitation services.
- Home health agency (HHA) care is covered by both HI and SMI. The BBA transferred from HI to SMI those home health services furnished on or after January 1, 1998, that are unassociated with a hospital or skilled nursing facility stay. HI will continue to cover the first

100 visits following a 3-day hospital stay or a skilled nursing facility stay; SMI covers any visits thereafter. Home health care under HI and SMI has no copayment and no deductible.

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

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

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

All citizens (and certain legal aliens) age 65 or over, 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 2002, the SMI program provided protection against the costs of physician and other medical services to about 38 million people (33 million aged and 5 million disabled). SMI benefits totaled \$111.0 billion in 2002.

The SMI program covers the following services and supplies:

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

To be covered, all services must be either medically necessary or one of several prescribed preventive benefits. SMI services are generally subject to a deductible and coinsurance (see next section). Certain medical services and related care are subject to special payment rules, including deductibles (for blood), maximum approved amounts (for Medicare-approved physical, speech, or occupational therapy services performed 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. Organizations 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.

These 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.

Program Financing, Beneficiary Liabilities, and Provider Payments

All financial operations for Medicare are handled through two trust funds, one for the Hospital Insurance (HI) program and one for the Supplementary Medical Insurance (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 (\$66.60 per beneficiary per month in 2004) and contributions from the general fund of the U.S. Treasury. Beneficiary premiums are generally set at a level that covers 25 percent of the average expenditures for aged beneficiaries. Therefore, the contributions from the general fund of the U.S. Treasury are the largest source of SMI income. The SMI trust fund also receives income from interest earnings on its invested assets, as well as a small amount of miscellaneous income. Beneficiary premiums and general fund payments are redetermined annually, to match estimated program costs for the following year.

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

Beneficiary Payment Liabilities

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

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

of fee-for-service beneficiaries. Such beneficiaries pay the monthly Part B premium and may, depending on the plan, pay an additional plan premium.

For hospital care covered under HI, a fee-for-service beneficiary's payment share includes a one-time deductible amount at the beginning of each benefit period (\$876 in 2004). 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 (\$219 per day in 2004) 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 (\$438 per day in 2004) 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 (\$109.50 per day in 2004) 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 SSA, the 2004 HI monthly premium rate is \$343; for those with 30 to 39 quarters of coverage, the rate is reduced to \$189. 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 in-

patient 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, home health care, inpatient rehabilitation, and long-term hospital care are made under separate prospective payment systems. Payments for psychiatric hospital care are currently reimbursed on a reasonable cost basis, but a prospective payment system is expected to be implemented in the near future, as required by the Balanced Budget Act (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 non-government 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.

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

The Medicare Integrity Program provided CMS with stable, increasing funding for payment safeguard activities, as well as new authorities to contract with entities to perform specific payment safeguard functions.

Administration

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 2002, HI covered about 40 million enrollees with benefit payments of \$149.9 billion, and SMI covered about 38 million enrollees with benefit payments of \$111.0 billion. Administrative costs were under 2 percent of HI and under 2 percent of SMI disbursements for 2002. Total disbursements for Medicare in 2002 were \$265.7 billion.

Note: Medicare enrollment data are based on estimates prepared for the 2003 annual report of the Medicare Board of Trustees to Congress (available on the Web at <http://www.cms.hhs.gov/publications/trusteesreport>). Medicare benefits, administrative costs, and total disbursements for 2002 are actual amounts for the calendar year, as reported by the Department of the Treasury.

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Medicare: History of Provisions

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 January 1, 1984.

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

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

1989. Disabled individuals under age 65 who are no longer entitled to Social Security disability benefits because their earnings exceeded the substantial gainful activity level have the option to purchase Medicare coverage by paying the HI and 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.

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 Health and Human Services must certify the prospective payment mechanism for HMOs before implementation.

1984. Medicare secondary payer provisions are extended to spouses aged 65-69 of workers under age 65 whose employer-based group health plan covers such spouses.

For HMOs, includes medical and other health services furnished by clinical psychologists.

1985. Provides payment for liver transplant services.

1986. Extends the working age secondary payer provision to cover workers and their spouses beyond age 69.

For HMOs that offered organ transplants as a basic health service on April 15, 1985, such services may be offered from October 1, 1985, through April 1, 1988.

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

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

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

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

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

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

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

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

1997. Established an expanded set of options for the delivery of health care under Medicare, referred to as Medicare+Choice. 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 September 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 September 30, 1998) to include the first 18 months of entitlement, has been extended, permanently, to include the first 30 months of entitlement on the basis of ESRD.

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 November 1, 1983, to October 1, 1986.

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

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

Hospice care benefit (enacted in 1982) made permanent.

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

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

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

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

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

All 1988 provisions became effective January 1, 1989.

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

The requirement for a prior hospital stay of 3 or more consecutive days is reinstated for skilled nursing facility services. Coverage returns to 100 days post-hospital care per spell of illness with a daily coinsurance rate in effect for days 21 through 100.

Home health services return to a limit of 21 consecutive days of care. Provision providing for home health care for fewer than 7 days per week continued due to a court decision.

Hospice care is returned to a lifetime limit of 210 days.

1990. Hospice care is extended beyond 210 days when beneficiary is certified as terminally ill.

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

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

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

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

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

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

There were no changes in 2001 affecting beneficiaries.

Supplementary Medical Insurance

1965. Physician and surgeon services. In-hospital services of anesthesiologists, pathologists, radiologists, and psychiatrists. Limited dental services. Home health ser-

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

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

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

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

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

The annual payment limits of \$500 per beneficiary for outpatient physical therapy services and outpatient

occupational therapy services, each, are raised to \$750, for 1990 and later. (See 1980.)

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

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

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

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

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

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

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

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

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

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

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

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

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

There were no changes in 2001 affecting beneficiaries.

Medicare Financing

Hospital Insurance Taxes

See Table 2.A3.

Appropriations from General Revenues

1965. For HI costs attributable to transitionally insured beneficiaries.

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

For the SMI program, an amount equal to participant premiums.

1972. For cost of SMI not met by enrollee premiums.

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

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

Participant Premiums

See also Table 2.C1.

1965. SMI enrollee premium rate (originally \$3 per month) to be established annually such as to pay one-half of program costs.

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

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

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

1984. SMI enrollee premiums for January 1, 1986, to December 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.

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- 1988.** Increases in the SMI premium may not exceed the dollar amount of the Social Security cost-of-living adjustments for 1989 and beyond.
- 1989.** Extends through calendar year 1990 the requirement that SMI premiums be set to cover 25 percent of aged program costs.
- 1990.** The SMI premium are \$29.90 in 1991; \$31.80 in 1992; \$36.60 in 1993; \$41.10 in 1994; and \$46.10 in 1995.
- 1993.** SMI enrollee premiums for January 1, 1996, to December 31, 1998, will be set to cover 25 percent of aged program costs.
- 1997.** The SMI premium is permanently set at 25 percent of program costs.

Income from Taxation of OASDI Benefits

- 1993.** The additional income tax revenues resulting from the increase in the taxable percentage applicable to OASDI benefits (an increase from 50 percent to 85 percent, see Table 2.A31) are transferred to the HI trust fund.

Interfund Borrowing

- 1981.** See Table 2.A6.
- 1983.** See Table 2.A6.

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Medicaid

The following are brief summaries of complex subjects. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services or the Department of Health and Human Services (DHHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.

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, services, or reimbursement 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.
- Certain Medicare beneficiaries (described later).

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

- Infants up to age 1 and pregnant women not covered under the mandatory rules whose family income is no more than 185 percent of the FPL (the percentage amount is set by each state).

- Children under age 21 who meet the AFDC income and resources requirements that were in effect in their state on July 16, 1996.
- Institutionalized individuals eligible under a "special income level" (the amount is set by each state, up to 300 percent of the SSI federal benefit rate).
- Individuals who would be eligible if institutionalized but who are receiving care under home and community-based services waivers.
- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage, but below the FPL.
- Recipients of state supplementary income payments.
- Certain working-and-disabled persons with family income less than 250 percent of the FPL who would qualify for SSI if they did not work.
- TB-infected persons who would be financially eligible for Medicaid at the SSI income level if they were within a Medicaid-covered category (however, coverage is limited to TB-related ambulatory services and TB drugs).
- Certain uninsured or low-income women who are screened for breast or cervical cancer through a program administered by the Centers for Disease Control. The Breast and Cervical Cancer Prevention and Treatment Act of 2000 (Public Law 106-354) provides these women with medical assistance and follow-up diagnostic services through Medicaid.
- "Optional targeted low-income children" included within the State Children's Health Insurance Program (SCHIP) established by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33).
- "Medically needy" persons (described below).

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

Medicaid eligibility and benefit provisions for the medically needy do not have to be as extensive as for the categorically needy, and may be quite restrictive. Federal matching funds are available for MN programs. However, if a state elects to have a MN program, there are federal requirements that certain groups and certain services must be included; that is, children under age 19 and pregnant women who are medically needy must be covered, and prenatal and delivery care for pregnant women, as well as ambulatory care for children, must be provided. A state

may elect to provide MN eligibility to certain additional groups and may elect to provide certain additional services within its MN program. As of August 2002, 36 states have elected to have a MN program and are providing at least some MN services to at least some MN beneficiaries. All remaining states utilize the "special income level" option to extend Medicaid to the "near poor" in medical institutional settings.

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

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

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

which states may select to provide health care coverage for more children, as prescribed within the BBA's Title XXI program.

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

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

Scope of Medicaid Services

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

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

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

- Diagnostic services.

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

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

Amount and Duration of Medicaid Services

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

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

have few limitations on the services that may be covered under these waivers (except that, other than as a part of respite care, states may not provide room and board for the beneficiaries). With certain exceptions, a state's Medicaid program must allow beneficiaries to have some informed choices among participating providers of health care and to receive quality care that is appropriate and timely.

Payment for Medicaid Services

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

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

The federal government pays a share of the medical assistance expenditures under each state's Medicaid program. That share, known as the Federal Medical Assistance Percentage (FMAP), is determined annually by a formula that compares the state's average per capita income level with the national income average. States with a higher per capita income level are reimbursed a smaller share of their costs. By law, the FMAP cannot be lower than 50 percent or higher than 83 percent. In fiscal year

(FY) 2003, the FMAPs varied from 50 percent in twelve states to 76.62 percent in Mississippi, and averaged 56.6 percent overall. The BBA also permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent and raised the FMAP for Alaska from 50 percent to 59.8 percent through 2000. The BIPA of 2000 further adjusted Alaska's FMAP to a higher level for FY 2001–2005. The Jobs and Growth Tax Relief Reconciliation Act of 2003 (Public Law 108-27), in order to bring about state fiscal relief in the current troubled economy, has made three temporary modifications to the states' FMAP calculation: (1) the FMAP for the last two quarters of 2003 will equal the greater of the current law FMAPs for 2002 or 2003; (2) the FMAP for the first three quarters of 2004 will equal the greater of the current law FMAPs for 2003 or 2004; and (3) for the last two quarters of 2003 and first three quarters of 2004, the newly calculated (under 1 and 2 above) FMAP will increase by 2.95 percentage points. The federal government pays states a higher share for children covered through the SCHIP program. This "enhanced" FMAP averages about 70 percent for all states, compared to the general Medicaid average of 56.6 percent.

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

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

Summary and Trends

Medicaid was initially formulated as a medical care extension of federally funded programs providing cash income assistance for the poor, with an emphasis on dependent children and their mothers, the disabled, and the elderly. Over the years, however, Medicaid eligibility has been

incrementally expanded beyond its original ties with eligibility for cash programs. Legislation in the late 1980s assured Medicaid coverage to an expanded number of low-income pregnant women, poor children, and to some Medicare beneficiaries who are not eligible for any cash assistance program. Legislative changes also focused on increased access, better quality of care, specific benefits, enhanced outreach programs, and fewer limits on services.

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

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

As with all health insurance programs, most Medicaid beneficiaries incur relatively small average expenditures per person each year, and a relatively small proportion incurs very large costs. Moreover, the average cost varies substantially by type of beneficiary. National data for 2000, for example, indicate that Medicaid payments for services for 21.6 million children, who constitute 50 percent of all Medicaid beneficiaries, average about \$1,290 per child (a relatively small average expenditure per person). Similarly, for 9.6 million adults, who comprise 22 percent of beneficiaries, payments average about \$1,930 per person. However, certain other specific groups have much larger per-person expenditures. Medicaid payments for services for 4.1 million aged, constituting 10 percent of all Medicaid beneficiaries, average about \$11,345 per person; for 7.5 million disabled, who comprise 18 percent of beneficiaries, payments average about \$10,040 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 2000 payments to health care vendors for 42.8 million Medicaid beneficiaries average \$3,935 per person.

Long-term care is an important provision of Medicaid that will be increasingly utilized as our nation's population ages. The Medicaid program paid for over 41 percent of the

total cost of care for persons using nursing facility or home health services in 2001. National data for 2000 show that Medicaid payments for nursing facility services (excluding ICFs/MR) totaled \$34.4 billion for more than 1.7 million beneficiaries of these services—an average expenditure of \$20,220 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$3.1 billion for more than 995,000 beneficiaries—an average expenditure of \$3,135 per home health care beneficiary. With the percentage of our population who are elderly or disabled increasing faster than that of the younger groups, the need for long-term care is expected to increase.

Another significant development in Medicaid is the growth in managed care as an alternative service delivery concept different from the traditional fee-for-service system. Under managed care systems, HMOs, prepaid health plans (PHPs), or comparable entities agree to provide a specific set of services to Medicaid enrollees, usually in return for a predetermined periodic payment per enrollee. Managed care programs seek to enhance access to quality care in a cost-effective manner. Waivers may provide the states with greater flexibility in the design and implementation of their Medicaid managed care programs. Waiver authority under sections 1915(b) and 1115 of the Social Security Act is an important part of the Medicaid program. Section 1915(b) waivers allow states to develop innovative health care delivery or reimbursement systems. Section 1115 waivers allow 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 58 percent in 2002.

More than 42.8 million persons received health care services through the Medicaid program in FY 2000 (the last year for which beneficiary data are available). In FY 2002, total outlays for the Medicaid program (federal and state) were \$258.2 billion, including direct payment to providers of \$185.8 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$45.1 billion, payments to disproportionate share hospitals of \$15.4 billion, and administrative costs of \$11.9 billion. Outlays under the SCHIP program in FY 2002 were \$5.4 billion. With no changes to either program, expenditures under Medicaid and SCHIP are projected to reach \$425 billion and \$7.5 billion, respectively, by FY 2008.

The Medicaid-Medicare Relationship

Medicare beneficiaries who have low incomes and limited resources may also receive help from the Medicaid program. For such persons who are eligible for full Medicaid coverage, the Medicare health care coverage is supplemented by services that are available under their state's

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

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

who lost entitlement because of their return to work (despite the disability), are allowed to purchase Medicare HI and SMI coverage. If these persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their HI premiums as Qualified Disabled and Working Individuals (QDWIs).

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

CMS estimates that Medicaid currently provides some level of supplemental health coverage for about 6.5 million Medicare beneficiaries.

Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2004 Budget and are consistent with data received from the states on the Forms HCFA-2082, HCFA-37, and HCFA-64.

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Unemployment Insurance

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

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

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

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

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

Aside from federal standards, each state has major responsibility for the content and development of its unemployment insurance law. The state itself decides the

amount and duration of benefits (except for certain federal requirements concerning federal-state Extended Benefits), the contribution rates (with limitations), and, in general, the eligibility requirements and disqualification provisions. The states also directly administer the programs collecting contributions, maintaining wage records (where applicable), taking claims, determining eligibility, and paying benefits to unemployed workers.

Coverage

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

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

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

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

Through special federal legislation, federal civilian employees and ex-servicemembers of the armed forces were brought under the unemployment insurance system. Benefits for those persons are financed through federal funds but are administered by the states and paid in accor-

dance with the provisions of the state laws. A separate unemployment insurance law enacted by Congress covers railroad workers.

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

Eligibility for Benefits

Unemployment benefits are available as a matter of right (without a means test) to unemployed workers who have demonstrated their attachment to the labor force by a specified amount of recent work or earnings in covered employment. All workers whose employers contribute to or make payments in lieu of contributions to state unemployment funds, federal civilian employees, and ex-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 13 states require a waiting period of 1 week of total unemployment before benefits can begin. Four states pay benefits retroactively for the waiting period if unemployment lasts a certain period or if the employee returns to work within a specified period.

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

Extended Benefits

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

State law determines most eligibility conditions for Extended Benefits and the weekly benefit payable. However, under federal law a claimant must have had 20 weeks in full-time employment (or the equivalent in insured

wages) and must meet special work requirements. A worker who has exhausted his or her regular benefits is eligible for a 50-percent increase in duration of benefits for a maximum of 13 weeks of Extended Benefits. There is, however, an overall maximum of 39 weeks of regular and Extended Benefits. Extended Benefits are payable at the same rate as the weekly amount under the regular state program.

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

The 1992 legislation (P.L. 102-318) provided states the option of adopting an additional formula for triggering the permanent Extended Benefits program. Effective March 1993, states had the option of amending their laws to use alternative total unemployment rate triggers in addition to the current insured unemployment rate triggers. Under this

option, Extended Benefits would be paid when (1) the state's seasonally adjusted total unemployment rate for the most recent 3 months is at least 6.5 percent, and (2) that rate is at least 110 percent of the state average total unemployment rate in the corresponding 3-month period in either of the 2 preceding years.

States triggering on to the Extended Benefits program under other triggers would provide the regular 26 weeks of unemployment benefits in addition to 13 weeks of Extended Benefits, (which is the same number of weeks of benefits provided previously). In addition, states that have chosen the total unemployment rate option will also amend their state laws to add an additional 7 weeks of Extended Benefits (for a total of 20 weeks) where the total unemployment rate is at least 8 percent and is 110 percent of the state's total unemployment rate for the same 3 months in either of the 2 preceding years. As of April 20, 2003, Extended Benefits were payable for 13 weeks in Alaska, Oregon, and Washington.

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Workers' Compensation

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

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

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

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

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

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

U.S. Department of Energy to deal with other claims of work-related occupational disease.

Coverage

In 2001, state and federal workers' compensation laws covered about 127.0 million employees. Covered payroll in 2001—that is, total wages paid to covered workers—was \$4.6 trillion.

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

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

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

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

Benefits

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

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

Temporary and Permanent Total Disability

A large majority of compensation cases involving cash payments involve temporary total disability. That is, the employee is unable to work at all while he or she is recov-

ering 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 being set at some percentage of the states 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 scheme. The level of impairment, often expressed as a percentage of total disability, is used to determine the benefit amount. Some states provide benefits based on the loss of earning capacity. They use impairment ratings with modifications based on vocational factors, such as the worker's education, job experience, and age. Other states use systems that attempt to compensate workers for actual lost wages.

Death Benefits

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

Medical Benefits

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

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

Financing

Workers' compensation programs are financed almost exclusively by employers and are based on the principle that the cost of work-related accidents is a business expense. Depending on state laws, employers can purchase insurance from a private carrier or state fund, or they can self-insure. No program relies on general taxing power to finance workers' compensation. Employers in most programs are permitted to carry insurance against work accidents with commercial insurance companies or to qualify as self-insurers by giving proof of financial ability to carry their own risk. In 7 jurisdictions, however, commercial insurance is not allowed. In four of these areas, including Puerto Rico and the Virgin Islands, employers must insure with an exclusive state fund, and in three others, they must either insure with an exclusive state insurance fund or self-insure. In 19 jurisdictions, state funds have been established that compete with private insurance carriers. Federal employees are provided protection through a federally financed and operated system.

Program Highlights

Benefit payments under workers' compensation programs increased 3.5 percent in 2001 to \$49.4 billion, from the 2000 figure of \$47.7 billion. When compared to covered wages, benefits grew by just 1.0 percent from \$1.06 to \$1.07 per \$100 of covered wages.

In 2001, medical benefits accounted for \$22.0 billion, and wage loss compensation for \$27.4 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$49.4 billion for workers' compensation benefit payments in 2001 includes over \$870 million in benefits for the Black Lung program. This program is described separately (see Tables 9.D1–9.D3).

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally, in 2001, such costs were approximately \$1.39 per \$100 of covered wages, or about \$504 for each of the 127.0 billion protected employees.

The year 2001 is the first year since 1992 that benefits grew faster than wages. It is the first year since 1993 that employer costs increased relative to covered wages.

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Temporary Disability Insurance

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

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

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

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

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

In California, New Jersey, and Puerto Rico, coverage is provided through a state-operated fund, but employers are

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

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

Eligibility for Benefits

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

Earnings or Employment Requirements

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

Disability Requirements

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

Disqualifying Income

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

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

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

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

Financing and Administration

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

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

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

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Black Lung Benefits

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

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

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

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

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

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

Since Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. Reflecting a 3.1 percent adjustment, monthly benefit rates effective January 1, 2003, are:

- Miner or widow, \$534.60
- Miner or widow and 1 dependent, \$801.90
- Miner or widow and 2 dependents, \$935.50
- Miner or widow and 3 or more dependents (family benefit), \$1,069.20

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

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

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Veterans' Benefits

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

Monetary Benefits

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

Compensation for Service-connected Disabilities

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

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. Service less than 90 days is acceptable if the veteran was discharged with a service-connected disability.

Pension payments are reduced by countable income. Some medical and other expenses are allowed as deductions from countable income. Veterans aged 65 years or older who meet service, net worth, and income require-

ments are eligible for pension, regardless of current physical condition.

Effective December 1, 2002, maximum benefit amounts for non-service-connected disabilities range from \$807 per month for a veteran without a dependent spouse or child to \$1,597 per month for a veteran who is in need of regular aid and attendance and who has one dependent. For each additional dependent child, the pension is raised by \$136 per month.

Benefits for Survivors

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

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

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

The monthly benefit amount payable to surviving spouses of veterans, who died before January 1, 1993, depends on the last pay rate of the deceased service person or veteran. In 2003, for pay grades E-1 through E-6, a flat monthly rate of \$948 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$980 and \$1,165. For veterans who died after January 1, 1993, surviving spouses receive a flat \$948 a month. An additional \$204 a month will be paid to supplement the basic rate if the deceased veteran had been entitled to receive 100-percent service-connected compensation for at least 8 years immediately preceding death. The amounts payable to eligible parents are lower and depend on: (1) the number of parents eligible, (2) their income, and (3) their marital status.

Pensions for Non-service-connected Death

Pensions are paid based on need to surviving spouses and dependent children (under age 18, disabled or students) of deceased veterans of the wartime periods specified in the

disability pension program. For a pension to be payable, the veteran generally must have met the same service requirements established for the non-service-connected disability pension program, and the surviving spouse must meet the same marriage requirements as under the dependency and indemnity compensation program.

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

Hospitalization and Other Medical Care

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

Enrollment and Provision of Hospitalization and Outpatient Medical Care to Veterans

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

Enrolled veterans and those not subject to enrollment are eligible to receive comprehensive medical benefits, which 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 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 the VA:

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

Other Medical Benefits

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

Educational Assistance

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

the first 12 months of their service unless they specifically elect not to participate. An educational assistance program is also available for individuals who enter the Selected Reserve on or after July 1, 1985.

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

CONTACT: Gloria Bennett (202) 273-5776.

Temporary Assistance for Needy Families

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

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

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

Program Features

Work Requirements

With few exceptions, recipients must work as soon as job ready, or no later than 2 years after coming on assistance. In fiscal year 1997, each state had to ensure that 25 percent of all families in the state were engaged in work activities. This percentage increased to 50 percent in 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 par-

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

Work Activities

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

Five-Year Time Limit

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

State Maintenance of Effort Requirements

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

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

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 two additional funds: a \$800 million fund available over 4 years to provide supplemental grants for states with high population growth and historically low welfare spending and a \$1.7 billion federal loan fund.

Penalties

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

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

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

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

Personal Employability Plans

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

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

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

State Plans

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

Job Subsidies

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

Waivers

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

Effective Dates

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

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

Tribal Programs

Federally recognized Indian tribes may apply directly to HHS to operate a TANF block grant program. Eligible tribes include the federally recognized tribes in the lower 48 states and 13 designated entities in Alaska (that is, the 12 Alaska Native regional nonprofit associations and Matlakatla). TANF allotments for Indian tribes are based upon previous state expenditures of federal dollars in AFDC,

Emergency Assistance (EA), and JOBS on tribal members in fiscal year 1994. Tribal TANF programs could be implemented as early as July 1, 1997. Like states, Indian tribes can use their TANF funding in any manner reasonably calculated to accomplish the purposes of TANF. They have broad flexibility to determine eligibility, method of assistance, and benefit levels. Unlike state plans, the federal government approves tribal plans. Tribes and HHS must reach agreement on time limits, work requirements, and minimum participation rates.

In addition to authorizing tribes to administer TANF, the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 replaced the former tribal JOBS program with the Native Employment Works (NEW) program. The NEW program provides funding for tribes and intertribal consortia to design and administer tribal work activities that meet the unique employment and training needs of their populations while allowing tribes and states to provide other TANF services.

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

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Food Stamps

Overview

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

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

As of October 2003, an eligible four-person household in the continental United States with no income receives \$471 per month in food stamps. Households with income receive food stamps valued at the difference between the maximum allotment and 30 percent of their income, after certain allowable deductions.

To qualify for food stamps, a household must have:

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

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

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

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

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

1. Twenty percent of earned income.
2. Standard deduction of \$134 for fiscal year 2002 for households with one to four members, \$147 for house-

holds with five members, and \$168 for households with six or more members.

3. Amount paid for dependent care (up to \$200 a month for each child under age 2 and \$175 for all other dependents) while the dependent's caretaker is working or looking for work.
4. Out-of-pocket medical expenses in excess of a \$35 deductible for a person aged 60 or older or a disabled person. If more than one person in the household is aged or disabled, \$35 is subtracted once before deducting combined medical expenses.
5. Legally owed child support payments.
6. Excess shelter expenses, which are total shelter costs including utilities minus 50 percent of income after all the above deductions have been subtracted. Effective October 1, 2002, the limit was \$367. The limit does not apply to households with an aged or disabled member.

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

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

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

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

Initiated on a pilot basis in 1961, the Food Stamp program was formally established by the Food Stamp Act of 1964, with 22 states operating 43 projects, serving 350,000 people. The Food Stamp Act of 1977, as amended (P.L. 95-113), has been extended to all 50 states, the District of Columbia, Guam, and the Virgin Islands. Authorization for

this program extends through September 30, 2002. (Since July 1982, Puerto Rico receives a block grant for nutrition assistance rather than participating in the Food Stamp program.)

The Food Stamp program is administered nationally by the Food and Nutrition Service of the Department of Agriculture (USDA) and operates through local welfare offices and the nation's food marketing and banking systems. Since August 1, 1980, persons receiving or applying for SSI payments have been permitted to apply for food stamps through local Social Security district offices. The federal government, through general revenues, pays the entire cost of the food stamp benefits, but federal and state agencies share administrative costs.

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

History of Provisions

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

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

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

The Food and Agricultural Act of 1977 (P.L. 95-113) made sweeping changes to the Food Stamp program. It eliminated the purchase requirement and allowed households to receive only the bonus portion of their coupon allotments. Deductions from income were limited to a standard deduction, a 20-percent earnings deduction, and a combined excess shelter and child care deduction. The

poverty guidelines became the new eligibility limits and, for the first time, households receiving Aid to Families with Dependent Children (AFDC) or SSI payments were required to meet asset and income limits. The work registration requirements were tightened for students and for caretakers, whose children now had to be under age 12. Parents of children aged 12 or older were required to register for work. However, the age at which the registration exemption for older persons became effective was lowered from age 65 to age 60.

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

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

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

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

Further revisions were made by the Food Stamp Amendments of 1982 (P.L. 97-252). The maximum allotment was reduced from 100 percent to 99 percent of the TFP and adjustments to the standard and shelter deductions were delayed until October 1, 1983. (P.L. 98-473 restored maximum food stamp allotments to the full cost of the TFP beginning November 1, 1984.) A net income limit for nonelderly and nondisabled households was added to the existing gross income limit. Benefit computations and adjustments were rounded down to the nearest dollar, and new restrictions were placed on the use of the Standard Utility Allowance for the excess shelter expense deduction. At the same time, the definition of disability for food stamp purposes was expanded to include those persons receiving

certain veterans' payments, and annual cost-of-living adjustments to SSI payments and Social Security benefits were not counted in determining food stamp amounts for 3 months.

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

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

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

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

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

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

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

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

- The earnings of elementary or high school students who were aged 21 or younger were disregarded.
- Households that had breaks in participation of less than a month were allowed to receive a full month's benefit for the period of the break.
- The children of drug addicts and alcoholics living in treatment centers were permitted to qualify for food stamps.
- Food stamp households participating in demonstration projects were permitted to accumulate up to \$10,000 in resources.
- The shelter cap was raised to \$231 beginning July 1, 1994, then to \$247 beginning October 1995, and was to be eliminated entirely on January 1, 1997.
- The deduction for care of a child or other dependent was raised to \$200 per month for a child under age 2, and \$175 per month for all other dependents, effective September 1, 1994.
- State agencies were given the option to provide deductions for legally binding child support payments made to persons outside the household, effective September 1, 1994. This deduction became mandatory October 1, 1995.
- The definition of a food stamp household was simplified to allow adult siblings who lived together and adult children who lived with their parents to form separate households if they purchased or prepared food separately.
- The amount of the Fair Market Value of a household's first vehicle that is excluded from the asset test was increased from \$4,500 to \$4,550, effective September 1, 1995. The limit was to have been raised to \$5,000, effective October 1, 1996, and indexed thereafter.

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

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

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (P.L. 104-193) made sweeping changes to the Food Stamp program. The following addi-

tional restrictions were placed on the eligibility of certain low-income persons.

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

Other key provisions included the following:

- The maximum allotment was set at 100 percent of the Thrifty Food Plan, effective October 1, 1996.
- The standard deduction was frozen at \$134.
- The excess shelter deduction cap was set at \$250, effective January 1, 1997 (instead of being lifted), to be raised to \$275 on October 1, 1998, and to \$300 on October 1, 2000.
- The earnings of elementary or high school students aged 18–21 were counted again.
- Households with breaks in participation of less than a month received prorated benefits for the period of the break.
- Adult children under age 22 living with their parents were counted in the same household as their parents.
- The amount of Fair Market Value for a household's first vehicle that is excluded from the asset test was frozen at \$4,650, effective October 1, 1996.
- State and local energy assistance was counted as income.
- Recipients could be disqualified or given sanctions for a variety of reasons, such as failure to pay child support, receipt of multiple benefits, or failure to meet work requirements.
- States were permitted to operate a simplified Food Stamp program for households in which all household members participate in the state's Temporary Assis-

tance for Needy Families program. In the simplified Food Stamp program, states may utilize their TANF rules to determine Food Stamp program benefits, provided the TANF rules do not increase the aggregate cost of the Food Stamp program.

- States were required to implement Electronic Benefit Transfer (EBT) systems for issuing benefits before October 1, 2002, unless USDA granted a waiver.

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

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

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

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

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

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

- Effective April 1, 2003, legal immigrants with 5 years residency in the United States became eligible for food stamps. Effective October 1, 2003, eligibility was extended to legal immigrants under age 18, regardless of date of arrival in the United States.
- The current fixed standard deduction was replaced with a deduction that varies according to household size (with larger households receiving larger deductions) and is adjusted annually.
- The resource limit for households with a disabled member was increased from \$2,000 to \$3,000, consistent with the resource limit for households with elderly members.
- The requirement that federal costs for electronic benefit transfer systems not exceed the costs of paper coupon systems was eliminated.
- The Quality Control System, which historically measured payment accuracy, was substantially changed, with the liability threshold raised to 105 percent of the national average for 2 consecutive years. The current incentive system was replaced by bonuses for states demonstrating high or most improved performance.

This legislation also provided states with a number of options:

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

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Low-Income Home Energy Assistance Program

The Omnibus Budget Reconciliation Act of 1981 (P.L. 97-35), signed into law by the President on August 13, 1981, authorized seven block grants to be administered by the Department of Health and Human Services (HHS).⁴ As one of HHS' block grants, the Low-Income Home Energy Assistance Program (LIHEAP) is administered by the Administration for Children and Families' Office of Community Services (<http://www.acf.hhs.gov/programs/liheap>). Title XXVI of the Act authorized LIHEAP for fiscal years 1982–1984. Title VI of the Human Services Reauthorization Act of 1984 (P.L. 98-88) reauthorized and amended LIHEAP for fiscal years 1985–1986. Title V of the Human Services Reauthorization Act of 1986 (P.L. 99-425) reauthorized and amended LIHEAP for fiscal years 1987–1990. Title VII of the Augustus F. Hawkins Human Services Reauthorization Act of 1990 (P.L. 101-501) reauthorized and amended LIHEAP for fiscal years 1991–1994. Title XX of the National Institutes of Health Revitalization Act of 1993 (P.L. 103-43) reauthorized LIHEAP for fiscal year 1995. Title III of the Human Services Amendments of 1994 (P.L. 103-252) reauthorized and amended LIHEAP for fiscal years 1995–1999.⁵ Title III of the Coats Human Services Reauthorization Act of 1996 (P.L. 105-285) reauthorized and amended LIHEAP for fiscal years 2000–2004. No new provisions became effective in fiscal year 2001.

Under LIHEAP, grants are provided to grantees to assist eligible households to meet the costs of home energy. In addition to the 50 states and the District of Columbia, grants were provided in fiscal year 2001 to 128 Indian tribes or tribal organizations and 5 insular areas.

In accordance with the Act, the Secretary of HHS has left maximum policy discretion to the grantees. The federal information collection and reporting requirements for grantees were substantially reduced to require only information essential to federal administration and congressional oversight. Grantee decisions, directed by public participation in the development of grant applications, largely replaced federal regulations in shaping the program for fiscal years 1982–2001.

Funding

In addition to appropriating LIHEAP funds for FY 2000, the FY 2000 Consolidated Appropriations Act (Public Law 106-113) signed by the President on November 29, 1999, appropriated advance block grant funds of \$1.1 billion for

FY 2001. Those advance funds became available on October 1, 2000, the beginning of FY 2001.

LIHEAP emergency contingency funds were available in FY 2001. Under the terms of the contingency fund provision, the President could request all, part, or none of the emergency contingency funds for FY 2001; could distribute any amount so requested to all LIHEAP grantees or to just a portion of them; and could use the regular block grant formula or a different formula. As described below, there were three sources of emergency contingency funds available for FY 2001. The first two funds were released to assist low income households facing significant price increases in heating oil, natural gas, and propane prices in the winter.

- The Emergency Supplemental Act of 2000 (Public Law 106-46), signed into law on July 13, 2000, appropriated \$600 million in LIHEAP emergency contingency funds to be available to HHS until expended (no-year funds). The President released \$444.35 million of the funds in FY 2000.
- The President released the remaining \$155.65 million in FY 2001 on December 18, 2000. Half of the funds was awarded to the states, Indian tribes or tribal organizations, and the insular areas based on the LIHEAP block grant formula. The other half was distributed based on the LIHEAP block grant formula weighted by the relative percentage of low income households in each state that used fuel oil, natural gas, and propane for home heating.
- The Consolidated Appropriations Act for FY 2001 (Public Law 106-554), signed into law on December 21, 2000, appropriated \$300 million for FY 2001 for LIHEAP emergency contingency funds. The President released the \$300 million on December 30, 2000. These funds were distributed to all grantees in the same manner in which the \$155.65 million was distributed.
- The Supplemental Appropriations Act of 2001 (Public Law 107-20), signed into law on July 24, 2001, appropriated an additional \$300 million in LIHEAP energy emergency contingency funds to remain available to HHS until expended (no-year funds). None of the additional \$300 million was released in FY 2001.

Fiscal year 2001 LIHEAP funds were distributed approximately as follows:

- \$1.36 billion in block grants to the 50 states and the District of Columbia;
- \$12.5 million in direct block grants to 128 Indian tribes and tribal organizations;

4. 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.

5. 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.

- \$1.9 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, American Samoa, Guam, and the Commonwealth of the Northern Mariana Islands;
- \$451 million in emergency contingency funds to 50 states and the District of Columbia, \$4.0 million to 128 Indian tribes and tribal organizations, and \$308 thousand to the Commonwealth of Puerto Rico, Virgin Islands, American Samoa, Guam, and the Commonwealth of the Northern Mariana Islands;
- \$19.2 million in leveraging incentive awards to 37 states, \$1.4 million in leveraging incentive awards to 30 Indian tribes and tribal organizations; and \$23 thousand in leveraging incentive awards to the Commonwealth of the Northern Mariana Islands;
- \$4.5 million in REACH program awards to 5 states, \$1.2 million to 8 Indian tribes and tribal organizations, \$150 thousand to the Commonwealth of the Northern Mariana Islands, and \$1.0 million to 12 states for second and third year REACH administrative costs; and
- \$0.3 million for training and technical assistance.

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

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

- Use funds only for the purposes of the statute;
- Make payments only to eligible low-income households;
- Conduct outreach activities;
- Coordinate LIHEAP activities with similar and related programs;
- Provide, in a timely manner, that the highest level of assistance will be furnished to those households with the lowest incomes and highest energy costs in relation to income, taking into account family size, except that the grantee may not differentiate between categorically eligible and income eligible households;

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

Eligibility

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

Payments

Grantees make fuel assistance payments directly to eligible households or to home energy suppliers on behalf of eligible households. Payments can be provided in cash, fuel, prepaid utility bills, or as vouchers, stamps, or coupons that can be used in exchange for energy supplies. Payments

are to vary in such a way that the highest level of assistance is furnished to households with the lowest incomes and highest energy costs in relation to income, taking into account family size.

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Tables

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

Year enacted	Coverage election or waiver	Provision
1935	...	All workers in commerce and industry (except railroads) under age 65 in the continental United States, Alaska, and Hawaii and on American vessels. (Covered after 1936.)
1939	...	Age restriction eliminated.
1946	...	Railroad and Social Security earnings combined to determine eligibility for and amount of survivors benefits.
1950	...	Regularly employed farm and domestic workers. Nonfarm self-employed (except members of professional groups). Federal civilian employees not under a federal retirement system. U.S. citizens employed outside the United States by American employers. Workers in Puerto Rico and the Virgin Islands (effective January 1, 1951).
	Elective by employer	State and local government employees not under a state and local government retirement system. Termination permitted 2 years after giving notice if group has 5 years of coverage when notice is given.
	Elective by employer and employee	Employees (other than members of the clergy) of nonprofit organizations (upon election by employer, each current employee given a choice as to coverage; new employees are covered). Nonprofit organizations permitted to terminate coverage 2 years after giving notice, if the organization has 8 years of coverage when notice is given.
1951	...	Railroad workers with less than 10 years of service, for all benefits. (After October 1951, coverage retroactive to 1937.)
1954	...	Farm self-employed. Professional self-employed except lawyers, dentists, physicians, and members of other medical groups (taxable years ending after 1954). Additional regularly employed farm and domestic workers. Homeworkers.
	Elective by employer	U.S. citizens employed outside the United States by a foreign subsidiary of an American employer.
	Elective by employer and employee	State and local government employees (except fire fighters and police personnel) under a state or local government retirement system (coverage provided at state's option; a majority of the eligible employees must vote in favor). See above (elective by employer, 1950) for termination rule.
	Elective by individual	Members of the clergy and of religious orders not under a vow of poverty.
1956	...	Members of the uniformed services on active duty or on active duty for training. Remainder of professional self-employed except physicians (taxable years ending after 1955). Farm landlords who materially participate in farm operations.
	Elective by employer and employee	Fire fighters and police personnel in designated states. State and local government employees under a state or local government retirement system in designated states may be divided into two systems, one excluding employees not desiring coverage (new employees covered).
1960	...	U.S. citizens employed in United States by foreign governments or international organizations. Parents working for children (except domestic or casual labor). Workers in Guam and American Samoa.
1965	...	Interns. Self-employed physicians (taxable years ending on or after December 31, 1965). Tips for employee tax only.
	Elective by individual	Members of certain religious sects may obtain exemptions from self-employed coverage (retroactive to 1951).
1967	Elective by employer and employee	Fire fighters under state and local government retirement system (under a majority favorable vote) and only if governor of state certifies Social Security protection.
	Subject to waiver by individual	Members of the clergy and of religious orders not under a vow of poverty are covered automatically, but they can choose to be exempt on grounds of conscience or religious principles. Taxable years ending after 1967.
1972	Elective by employer	Members of a religious order who are subject to a vow of poverty. Retroactivity allowed for 5 years but not earlier than January 1, 1968.
1977	Elective by individual	Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after December 20, 1977.
1982	...	Federal employees—Hospital Insurance (Part A) program only, effective January 1, 1983.
1983	...	Federal employees newly hired after December 31, 1983, including executive, legislative, and judicial branch employees, and also including those hired before January 1, 1984, with a break in service lasting more than 365 days. Excludes re-employed annuitants hired before January 1, 1984.
	...	Legislative branch employees hired before 1984 who were not participating in the Civil Service Retirement System on December 31, 1983.
	...	Members of Congress, the President, the Vice President, sitting federal judges, and most executive-level political appointees of the federal government.
	...	Employees of nonprofit organizations.
	...	U.S. residents employed outside the United States by American employers.
	Elective by employer	U.S. residents employed outside the United States by a foreign affiliate of an American employer.
	...	Employees of nonprofit organizations placed under compulsory coverage; nonprofit organizations prohibited from terminating coverage of their employees on or after March 31, 1983.
	Elective by employer or by employer and employee	States prohibited from terminating coverage of employees (after April 20, 1983) and permitted to reinstate coverage for a terminated group.
1984	...	Rehired federal employees whose previous service was covered.
	...	Persons exercising reemployment rights to noncovered federal employment retain exemption after a period (not limited to 365 or fewer days) of military or national guard service or work for an international organization.
	...	Generally, all legislative branch employees except those who were participating on December 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system.
	...	Employees of nonprofit organizations who are also participating on a mandatory basis in the Civil Service Retirement System are treated like federal employees for Social Security tax and coverage purposes. They are therefore not covered unless hired on or after January 1, 1984, or reemployed after a break in service of more than 365 days.
	Elective by employer	Churches or church-related organizations may elect irrevocably to have services performed by their employees excluded from covered employment. Their employees are then treated as self-employed for Social Security purposes.
1986	...	State and local government employees hired after March 31, 1986—Hospital Insurance (Part A) program only.
	Elective by individual	Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after October 22, 1986.

(Continued)

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

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

Year enacted	Coverage election or waiver	Provision
1987	...	Members of uniformed services reserve components on inactive duty training. Irregularly employed farm workers (if employer's annual expenditures for farm labor is at least \$2,500). Services performed in trade or business of spouse or by children aged 18 or older in trade or business of parent. For employers, the full amount of covered tips.
1990	...	State and local government employees not under a state or local government retirement system. Exceptions: (1) students employed by the educational institution they attend and (2) election workers paid less than the mandated amount (\$100), unless either group covered under a state's Section 218 agreement.
1994	...	Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning January 1, 1995, and will be indexed for wage increases each year after December 31, 1999.
	...	Police and fire fighters under a public retirement system can be covered for Social Security in all states.
	...	Threshold for coverage of domestic employees' earnings raised from \$50 per calendar quarter to \$1,000 per calendar year per employer; amount subject to annual automatic adjustments. Domestic workers no longer covered for years in which they were under age 18, unless they are no longer in school and domestic employment is their principal occupation. Coverage of earnings of domestic workers on farms becomes subject to new annual threshold for domestic workers instead of annual threshold for agricultural employees.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: ... = not applicable.

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

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

Year enacted	Provision
1946	Fully insured status and average monthly wage of \$160 for World War II veterans who died within 3 years after discharge.
1950	Wage credits of \$160 per month of military service during World War II period (September 16, 1940–July 24, 1947).
1952	Wage credits of \$160 per month of military service to December 31, 1953.
1953	Wage credits of \$160 per month of military service to June 30, 1955.
1954	Wage credits of \$160 per month of military service to March 31, 1956.
1956	Wage credits of \$160 per month of military service to December 31, 1956.
1967	For uniformed services, wage credits of \$100 for each \$100 (or fraction thereof) of basic pay not in excess of \$300 per calendar quarter, beginning in 1968.
1972	For uniformed services, wage credits of \$300 per calendar quarter of service after 1956. (Supersedes 1967 provision.) For U.S. citizens of Japanese ancestry, wage credits for the period they were interned by the U.S. government during World War II period (December 7, 1941–December 31, 1946) and were aged 18 or older.
1977	For uniformed services, wage credits of \$100 for each \$300 of basic pay up to maximum credit of \$1,200 per calendar year after 1977.
2002	For uniformed services, deemed wage credits are eliminated for all years after calendar year 2001. Deemed wage credits will continue to be given for appropriate earnings for periods prior to calendar year 2002.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2003

Year	Annual maximum taxable earnings (dollars)		Contribution rate (percent)								
			Employer and employee, each				Self-employed person				
	OASDI	HI	Total, OASDI and HI	OASI	DI	HI	Total, OASDI and HI	OASI	DI	HI	
1937–1949	3,000	...	1.0	1.0	...	...	...	...	...	...	...
1950	3,000	...	1.5	1.5	...	...	...	...	...	...	...
1951–1953	3,600	...	1.5	1.5	...	...	2.25	2.25	...	...	...
1954	3,600	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1955–1956	4,200	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1957–1958	4,200	...	2.25	2.0	0.25	...	3.375	3.0	0.375	...	...
1959	4,800	...	2.5	2.25	0.25	...	3.75	3.375	0.375	...	...
1960–1961	4,800	...	3.0	2.75	0.25	...	4.5	4.125	0.375	...	...
1962	4,800	...	3.125	2.875	0.25	...	4.7	4.325	0.375	...	...
1963–1965	4,800	...	3.625	3.375	0.25	...	5.4	5.025	0.375	...	...
1966	6,600	6,600	4.2	3.5	0.35	0.35	6.15	5.275	0.525	0.35	0.35
1967	6,600	6,600	4.4	3.55	0.35	0.5	6.4	5.375	0.525	0.5	0.5
1968	7,800	7,800	4.4	3.325	0.475	0.6	6.4	5.0875	0.7125	0.6	0.6
1969	7,800	7,800	4.8	3.725	0.475	0.6	6.9	5.5875	0.7125	0.6	0.6
1970	7,800	7,800	4.8	3.65	0.55	0.6	6.9	5.475	0.825	0.6	0.6
1971	7,800	7,800	5.2	4.05	0.55	0.6	7.5	6.075	0.825	0.6	0.6
1972	9,000	9,000	5.2	4.05	0.55	0.6	7.5	6.075	0.825	0.6	0.6
1973	10,800	10,800	5.85	4.3	0.55	1.0	8.0	6.205	0.795	1.0	1.0
1974	13,200	13,200	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1975	^a 14,100	^a 14,100	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1976	^a 15,300	^a 15,300	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1977	^a 16,500	^a 16,500	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1978	^a 17,700	^a 17,700	6.05	4.275	0.775	1.0	8.1	6.01	1.09	1.0	1.0
1979	22,900	22,900	6.13	4.33	0.75	1.05	8.1	6.01	1.04	1.05	1.05
1980	25,900	25,900	6.13	4.52	0.56	1.05	8.1	6.2725	0.7775	1.05	1.05
1981	29,700	29,700	6.65	4.7	0.65	1.3	9.3	7.025	0.975	1.3	1.3
1982	^a 32,400	^a 32,400	6.7	4.575	0.825	1.3	9.35	6.8125	1.2375	1.3	1.3
1983	^a 35,700	^a 35,700	6.7	4.775	0.625	1.3	9.35	7.1125	0.9375	1.3	1.3
1984	^a 37,800	^a 37,800	^b 7.0	5.2	0.5	1.3	^b 14.0	10.4	1.0	2.6	2.6
1985	^a 39,600	^a 39,600	7.05	5.2	0.5	1.35	^b 14.1	10.4	1.0	2.7	2.7
1986	^a 42,000	^a 42,000	7.15	5.2	0.5	1.45	^b 14.3	10.4	1.0	2.9	2.9
1987	^a 43,800	^a 43,800	7.15	5.2	0.5	1.45	^b 14.3	10.4	1.0	2.9	2.9
1988	^a 45,000	^a 45,000	7.51	5.53	0.53	1.45	^b 15.02	11.06	1.06	2.9	2.9
1989	^a 48,000	^a 48,000	7.51	5.53	0.53	1.45	^b 15.02	11.06	1.06	2.9	2.9
1990	^c 51,300	^c 51,300	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1991	^c 53,400	^d 125,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1992	^c 55,500	130,200	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1993	^a 57,600	^a 135,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1994	^a 60,600	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1995	^a 61,200	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1996	^a 62,700	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1997	^a 65,400	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1998	^a 68,400	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1999	^a 72,600	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
2000	^a 76,200	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9	2.9
2001	^a 80,400	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9	2.9
2002	^a 84,900	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9	2.9
2003	^a 87,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9	2.9

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

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

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

d. Based on 1990 legislation.

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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

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

Table 2.A4—Maximum annual amount of contributions, 1937–2003 (in dollars)

Year	Employee					Self-employed person				
	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI
1937–1949	30.00	30.00	30.00	...	...	...	...	...	...	...
1950	45.00	45.00	45.00	...	...	...	...	...	...	...
1951–1953	54.00	54.00	54.00	...	...	81.00	81.00	81.00	...	...
1954	72.00	72.00	72.00	...	...	108.00	108.00	108.00	...	...
1955–1956	84.00	84.00	84.00	...	...	126.00	126.00	126.00	...	...
1957–1958	94.50	94.50	84.00	10.50	...	141.75	141.75	126.00	15.75	...
1959	120.00	120.00	108.00	12.00	...	180.00	180.00	162.00	18.00	...
1960–1961	144.00	144.00	132.00	12.00	...	216.00	216.00	198.00	18.00	...
1962	150.00	150.00	138.00	12.00	...	225.60	225.60	207.60	18.00	...
1963–1965	174.00	174.00	162.00	12.00	...	259.20	259.20	241.20	18.00	...
1966	277.20	254.10	231.00	23.10	23.10	405.90	382.80	348.15	34.65	23.10
1967	290.40	257.40	234.30	23.10	33.00	422.40	389.40	354.75	34.65	33.00
1968	343.20	296.40	259.35	37.05	46.80	499.20	452.40	396.825	55.575	46.80
1969	374.40	327.60	290.55	37.05	46.80	538.20	491.40	435.825	55.575	46.80
1970	374.40	327.60	284.70	42.90	46.80	538.20	491.40	427.05	64.35	46.80
1971	405.60	358.80	315.90	42.90	46.80	585.00	538.20	473.85	64.35	46.80
1972	468.00	414.00	364.50	49.50	54.00	675.00	621.00	546.75	74.25	54.00
1973	631.80	523.80	464.40	59.40	108.00	864.00	756.00	670.14	85.86	108.00
1974	772.20	653.40	577.50	75.90	118.80	1,042.80	924.00	816.42	107.58	118.80
1975	824.85	697.95	616.875	81.075	126.90	1,113.90	987.00	872.085	114.915	126.90
1976	895.05	757.35	669.375	87.975	137.70	1,208.70	1,071.00	946.305	124.695	137.70
1977	965.25	816.75	721.875	94.875	148.50	1,303.50	1,155.00	1,020.525	134.475	148.50
1978	1,070.85	893.85	756.675	137.175	177.00	1,433.70	1,256.70	1,063.77	192.93	177.00
1979	1,403.77	1,163.32	991.59	171.75	240.45	1,854.90	1,614.45	1,376.29	238.16	240.45
1980	1,587.67	1,315.72	1,170.68	145.04	271.95	2,097.90	1,825.95	1,624.58	201.37	271.95
1981	1,975.05	1,588.95	1,395.90	193.05	386.10	2,762.10	2,376.00	2,086.43	289.57	386.10
1982	2,170.80	1,749.60	1,482.30	267.30	421.20	3,029.40	2,608.20	2,207.25	400.95	421.20
1983	2,391.90	1,927.80	1,704.675	223.125	464.10	3,337.95	2,873.85	2,539.1625	334.6875	464.10
1984 ^a	2,646.00	2,154.60	1,965.60	189.00	491.40	5,292.00	4,309.20	3,931.20	378.00	982.80
1985 ^a	2,791.80	2,257.20	2,059.20	198.00	534.60	5,583.60	4,514.40	4,118.40	396.00	1,069.20
1986 ^a	3,003.00	2,394.00	2,184.00	210.00	609.00	6,006.00	4,788.00	4,368.00	420.00	1,218.00
1987 ^a	3,131.70	2,496.60	2,277.60	219.00	635.10	6,263.40	4,993.20	4,555.20	438.00	1,270.20
1988 ^a	3,379.50	2,727.00	2,488.50	238.50	652.50	6,759.00	5,454.00	4,977.00	477.00	1,305.00
1989 ^a	3,604.80	2,908.80	2,654.40	254.40	696.00	7,209.60	5,817.60	5,308.80	508.80	1,392.00
1990	3,924.45	3,180.60	2,872.80	307.80	743.85	7,848.90	6,361.20	5,745.60	615.60	1,487.70
1991	5,123.30	3,310.80	2,990.40	320.40	1,812.50	10,246.60	6,621.60	5,980.80	640.80	3,625.00
1992	5,328.90	3,441.00	3,108.00	333.00	1,887.90	10,657.80	6,882.00	6,216.00	666.00	3,775.80
1993	5,528.70	3,571.20	3,225.60	345.60	1,957.50	11,057.40	7,142.40	6,451.20	691.20	3,915.00
1994	^b	3,757.20	3,187.56	569.64	^b	^b	7,514.40	6,375.12	1,139.28	^b
1995	^b	3,794.40	3,219.12	575.28	^b	^b	7,588.80	6,438.24	1,150.56	^b
1996	^b	3,887.40	3,298.02	589.38	^b	^b	7,774.80	6,596.04	1,178.76	^b
1997	^b	4,054.80	3,498.90	555.90	^b	^b	8,109.60	6,997.80	1,111.80	^b
1998	^b	4,240.80	3,659.40	581.40	^b	^b	8,481.60	7,318.80	1,162.80	^b
1999	^b	4,501.20	3,884.10	617.10	^b	^b	9,002.40	7,768.20	1,234.20	^b
2000	^b	4,724.40	4,038.60	685.80	^b	^b	9,448.80	8,077.20	1,371.60	^b
2001	^b	4,984.80	4,261.20	723.60	^b	^b	9,969.60	8,522.40	1,447.20	^b
2002	^b	5,236.80	4,499.70	764.10	^b	^b	10,527.60	8,999.40	1,528.20	^b
2003	^b	5,394.00	4,611.00	783.00	^b	^b	10,788.00	9,222.00	1,566.00	^b

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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

Table 2.A5—Tax credits enacted in 1983

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

Year enacted	Provision																																																				
Quarter of coverage (QC)																																																					
1939	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 January 1, 1978 (<i>effective on January 1 of each year, dollar amount subject to automatic increase</i>):																																																				
	<table border="1"> <thead> <tr> <th>Year</th> <th>Amount (dollars)</th> </tr> </thead> <tbody> <tr><td>1979</td><td>260</td></tr> <tr><td>1980</td><td>290</td></tr> <tr><td>1981</td><td>310</td></tr> <tr><td>1982</td><td>340</td></tr> <tr><td>1983</td><td>370</td></tr> <tr><td>1984</td><td>390</td></tr> <tr><td>1985</td><td>410</td></tr> <tr><td>1986</td><td>440</td></tr> <tr><td>1987</td><td>460</td></tr> <tr><td>1988</td><td>470</td></tr> <tr><td>1989</td><td>500</td></tr> <tr><td>1990</td><td>520</td></tr> <tr><td>1991</td><td>540</td></tr> <tr><td>1992</td><td>570</td></tr> <tr><td>1993</td><td>590</td></tr> <tr><td>1994</td><td>620</td></tr> <tr><td>1995</td><td>630</td></tr> <tr><td>1996</td><td>640</td></tr> <tr><td>1997</td><td>670</td></tr> <tr><td>1998</td><td>700</td></tr> <tr><td>1999</td><td>740</td></tr> <tr><td>2000</td><td>780</td></tr> <tr><td>2001</td><td>830</td></tr> <tr><td>2002</td><td>870</td></tr> <tr><td>2003</td><td>890</td></tr> </tbody> </table>	Year	Amount (dollars)	1979	260	1980	290	1981	310	1982	340	1983	370	1984	390	1985	410	1986	440	1987	460	1988	470	1989	500	1990	520	1991	540	1992	570	1993	590	1994	620	1995	630	1996	640	1997	670	1998	700	1999	740	2000	780	2001	830	2002	870	2003	890
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1993	590																																																				
1994	620																																																				
1995	630																																																				
1996	640																																																				
1997	670																																																				
1998	700																																																				
1999	740																																																				
2000	780																																																				
2001	830																																																				
2002	870																																																				
2003	890																																																				
Disability definition																																																					
1954	Inability to engage in substantial gainful activity because of any medically determinable permanent physical or mental impairment.																																																				
1965	Disability lasting at least 12 months. For blind persons aged 55–64, inability to engage in usual occupation.																																																				
1967	Disability that precludes engagement in any substantial gainful work existing in the national economy. For surviving spouse, disability precludes any gainful activity.																																																				
1990	More restrictive definition for surviving spouse eliminated.																																																				
Period of disability																																																					
1954	Continuous period of at least 6 months as defined above or of blindness.																																																				
1972	At least 5 months of disability.																																																				
Fully insured																																																					
1935	Cumulative wages of \$2,000 and employment in each of 5 years after 1936 and before attainment of age 65.																																																				
1939	QC equal to one-half the quarters elapsed after 1936 (or quarter in which age 21 attained) and before quarter of death or attainment of age 65. Minimum 6 QC, maximum 40 QC.																																																				
1950	Elapsed period measured after 1950 (QC earned at any time are used).																																																				
1954	Period of disability excluded from elapsed period. Alternatively, QC earned in all quarters after 1954 and before quarter in which age 65 attained (minimum 6 QC).																																																				
1956	Elapsed period measured to age 62 for women. Alternatively, QC earned in all except 4 quarters after 1954 and before quarter in which age 65 attained (62 for women).																																																				
1960	QC reduced to one-third the elapsed quarters.																																																				
1961	QC equal to years elapsed after 1950 (or year age 21 attained) and before year of death or age 65 (62 for women).																																																				
1972	Elapsed period for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.																																																				
1983	Any person aged 55 or older on January 1, 1984, and employed by a nonprofit organization to whose employees coverage is extended solely by reason of the new compulsory coverage provision will be deemed fully insured upon subsequently acquiring 6 QC if aged 60 or older on January 1, 1984; 8 QC if aged 59; 12 QC if aged 58; 16 QC if aged 57; and 20 QC if aged 55 or 56.																																																				
Currently insured																																																					
1939	6 QC earned in 12 quarters before quarter of death.																																																				
1946	6 QC earned in preceding 13 quarters, including quarter of death.																																																				
1950	Including quarter of retirement added.																																																				
1954	Including quarter of disablement added.																																																				

(Continued)

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2003

Year	Annual maximum taxable earnings (dollars)	Average annual wage ^a (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b —						
			1990	1991	1992	1993	1994	1995	1996
1951	3,600	2,799.16	6.9070864	7.1805649	7.5122465	7.7921948	8.1936795	8.2641471	8.4859494
1952	3,600	2,973.32	6.5025090	6.7599687	7.0722223	7.3357728	7.7137409	7.7800809	7.9888912
1953	3,600	3,139.44	6.1584359	6.4022724	6.6980035	6.9476085	7.3055768	7.3684065	7.5661679
1954	3,600	3,155.64	6.1268205	6.3694053	6.6636182	6.9119418	7.2680724	7.3305795	7.5273257
1955	4,200	3,301.44	5.8562445	6.0881161	6.3693358	6.6066928	6.9470958	7.0068425	7.1948998
1956	4,200	3,532.36	5.4734059	5.6901194	5.9529550	6.1747953	6.4929452	6.5487861	6.7245496
1957	4,200	3,641.72	5.3090408	5.5192464	5.7741891	5.9893677	6.2979636	6.3521276	6.5226129
1958	4,200	3,673.80	5.2626817	5.4710518	5.7237683	5.9370679	6.2429691	6.2966601	6.4656568
1959	4,800	3,855.80	5.0142746	5.2128093	5.4535972	5.6568287	5.9482909	5.9994476	6.1604673
1960	4,800	4,007.12	4.8249216	5.0159591	5.2476542	5.4432111	5.7236669	5.7728918	5.9278310
1961	4,800	4,086.76	4.7308968	4.9182115	5.1453915	5.3371375	5.6121279	5.6603936	5.8123134
1962	4,800	4,291.40	4.5052990	4.6836813	4.9000280	5.0826304	5.3445076	5.3904716	5.5351470
1963	4,800	4,396.64	4.3974581	4.5715706	4.7827386	4.9609702	5.2165790	5.2614428	5.4026552
1964	4,800	4,576.32	4.2248007	4.3920770	4.5949540	4.7661877	5.0117605	5.0548629	5.1905308
1965	4,800	4,658.72	4.1500756	4.3143932	4.5136819	4.6818869	4.9231162	4.9654562	5.0987245
1966	6,600	4,938.36	3.9150730	4.0700860	4.2580897	4.4167699	4.6443394	4.6842818	4.8100037
1967	6,600	5,213.44	3.7084996	3.8553335	4.0334175	4.1837251	4.3992872	4.4371221	4.5562105
1968	7,800	5,571.76	3.4700059	3.6073969	3.7740283	3.9146697	4.1163690	4.1517707	4.2632005
1969	7,800	5,893.76	3.2804254	3.4103102	3.5678378	3.7007954	3.8914751	3.9249427	4.0302846
1970	7,800	6,186.24	3.1253298	3.2490738	3.3991536	3.5258251	3.7074895	3.7393748	3.8397363
1971	7,800	6,497.08	2.9758045	3.0936282	3.2365278	3.3571389	3.5301120	3.5604718	3.6560316
1972	9,000	7,133.80	2.7102021	2.8175096	2.9476548	3.0575009	3.2150355	3.2426855	3.3297163
1973	10,800	7,580.16	2.5506111	2.6515997	2.7740813	2.8774591	3.0257171	3.0517390	3.1336449
1974	13,200	8,030.76	2.4074982	2.5028204	2.6184296	2.7160070	2.8559464	2.8805082	2.9578184
1975	14,100	8,630.92	2.2400903	2.3287842	2.4363544	2.5271466	2.6573552	2.6802091	2.7521435
1976	15,300	9,226.48	2.0954947	2.1784635	2.2790902	2.3640218	2.4858256	2.5072043	2.5744954
1977	16,500	9,779.44	1.9770089	2.0552864	2.1502233	2.2303527	2.3452693	2.3654391	2.4289254
1978	17,700	10,556.03	1.8315636	1.9040823	1.9920349	2.0662692	2.1727316	2.1914176	2.2502333
1979	22,900	11,479.46	1.6842290	1.7509142	1.8317917	1.9000545	1.9979529	2.0151357	2.0692202
1980	25,900	12,513.46	1.5450595	1.6062344	1.6804289	1.7430511	1.8328600	1.8486230	1.8982384
1981	29,700	13,773.10	1.4037537	1.4593338	1.5267427	1.5836377	1.6652330	1.6795543	1.7246321
1982	32,400	14,531.34	1.3305063	1.3831863	1.4470778	1.5010040	1.5783417	1.5919158	1.6346414
1983	35,700	15,239.24	1.2687011	1.3189339	1.3798575	1.4312787	1.5050239	1.5179674	1.5587083
1984	37,800	16,135.07	1.1982619	1.2457058	1.3032469	1.3518132	1.4214639	1.4336889	1.4721678
1985	39,600	16,822.51	1.1492958	1.1948009	1.2499906	1.2965723	1.3633768	1.3751022	1.4120087
1986	42,000	17,321.82	1.1161668	1.1603602	1.2139590	1.2591979	1.3240768	1.3354642	1.3713068
1987	43,800	18,426.51	1.0492513	1.0907953	1.1411808	1.1837076	1.2446969	1.2554016	1.2890954
1988	45,000	19,334.04	1.0000000	1.0395939	1.0876144	1.1281450	1.1862715	1.1964737	1.2285860
1989	48,000	20,099.55	1.0000000	1.0000000	1.0461916	1.0851785	1.1410912	1.1509049	1.1817941
1990	51,300	21,027.98	1.0000000	1.0000000	1.0000000	1.0372656	1.0907096	1.1000900	1.1296154
1991	53,400	21,811.60	1.0000000	1.0000000	1.0000000	1.0000000	1.0515240	1.0605673	1.0890320
1992	55,500	22,935.42	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0086002	1.0356702
1993	57,600	23,132.67	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0268391
1994	60,600	23,753.53	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1995	61,200	24,705.66	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2000	76,200	32,154.82	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2001	80,400	32,921.92	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2002	84,900	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2003	87,000	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year enacted	Provision
Average monthly wage (AMW)	
1939	Computed using creditable earnings after 1936 and before year of death or retirement, divided by months after 1936 and before quarter of death or retirement, excluding months before age 22 in quarters not covered.
1950	Alternatively, computed using creditable earnings after 1950 (or year aged 21, if later) and before year of death, year of retirement, or subsequent year (or year age 65 attained if then insured), divided by number of months in those years.
1954	Earnings and months in 4 years may be excluded in all cases; 5 years if worker has 20 quarters of coverage. Period of disability may be excluded.
1956	Earnings and months in 5 years may be excluded in all cases. Computation period may end at age 62 for women then insured.
1960	Earnings may be used for any year after 1950 and before year of retirement but including year of death, with the number of years equal to the years elapsed after 1955 (or year age 26 attained) and before year of death or age 65 attained (62 for women). Same method may be used for earnings after 1936 and years elapsed after 1941.
1972	Number of years for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.
1977	For workers who attain age 62, become disabled, or die after 1978, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1936. For workers who attain age 62 after 1978 and before 1984, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1950.
Average indexed monthly earnings (AIME)	
1977	For workers who attain age 62, become disabled, or die after 1978, AIME is computed by using indexed earnings after 1950 for the same computation period applicable in calculating the AMW. Indexed earnings for a given year equal actual creditable earnings multiplied by the national average wage for the second year before worker attains age 62, becomes disabled, or dies, divided by the national average wage for the given year, except that for years after the second year before the worker attains age 62, becomes disabled, or dies, indexed earnings equal actual creditable earnings.
1980	For disabled workers, the number of years of earnings used equals the number of years elapsed after 1950 (or year age 21 attained, if later) and before year of disability, minus dropout years equal to one-fifth of the number of elapsed years rounded to the next lower integer (to a maximum of 5 dropout years). However, the number of years of earnings used is at least 2. <i>Effective for initial entitlement after June 1980.</i> Disabled workers who receive less than 3 dropout years under the one-fifth rule may be credited with additional dropout years based on child care, up to a total of 3 dropout years. (To receive this credit, a worker must have had no earnings in that year and have been living with a child under age 3.) However, the number of years of earnings used is at least 2. <i>Effective for July 1981.</i>
1983	For workers who die after 1978 but before attaining age 62, indexed earnings for a given year equal actual creditable earnings, multiplied by the national average wage for the earlier of (1) the year in which the worker reached or would have reached age 60 or (2) the second year before the survivor becomes eligible for aged or disabled widow(er) benefits, and then divided by the national average wage for the given year. This computation method applies only if it results in a higher benefit. <i>Effective for surviving spouses newly eligible after 1984.</i>

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

- a. For workers who attained age 62 in the 1979–1983 period, the PIA cannot be less than that derived from the PIA table in effect in December 1978 (approximated by the PIA formula in Table 2.A16) 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.
- b. 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 in successive calendar years. The legislation also froze the minimum PIA at \$122.
- c. Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.
- d. The minimum PIA was eliminated by 1981 legislation for workers who attain age 62 or die after 1981 (after 1991 for members of certain religious orders). August 1981 legislation would have eliminated the minimum PIA effective March 1982 for workers who attained age 62 before November 1981 or who died (before attaining age 62) before March 1982; for all others, the minimum would have been eliminated effective November 1981. This legislation was superseded by December 1981 legislation that restored the minimum PIA for workers who attained age 62 or died (before attaining age 62) before 1982.
- e. The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits were calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

... = not available.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year effective	Provision																												
	Enacted in 1983																												
1986	Workers first eligible for pensions based on noncovered employment and disability or retired workers after December 31, 1985. ^a The benefit computation formula uses a reduced factor of the usual first AIME bend point.																												
	<table border="0"> <thead> <tr> <th style="text-align: left;"><i>Year eligible</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>1986</td><td style="text-align: center;">80</td></tr> <tr><td>1987</td><td style="text-align: center;">70</td></tr> <tr><td>1988</td><td style="text-align: center;">60</td></tr> <tr><td>1989</td><td style="text-align: center;">50</td></tr> <tr><td>1990 and later</td><td style="text-align: center;">40</td></tr> </tbody> </table>	<i>Year eligible</i>	<i>Factor (percent)</i>	1986	80	1987	70	1988	60	1989	50	1990 and later	40																
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1986	80																												
1987	70																												
1988	60																												
1989	50																												
1990 and later	40																												
	WEP is not applicable to persons who were federal employees or nonprofit employees on January 1, 1984, and who were covered by Social Security on that date with no Civil Service Retirement System coverage; to persons with Railroad Retirement pensions; or to workers with 30 years of substantial Social Security earnings. Workers with 26–29 years of coverage have less than full WEP applied. ^b For benefits payable before January 1989:																												
	<table border="0"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>26</td><td style="text-align: center;">50</td></tr> <tr><td>27</td><td style="text-align: center;">60</td></tr> <tr><td>28</td><td style="text-align: center;">70</td></tr> <tr><td>29</td><td style="text-align: center;">80</td></tr> </tbody> </table>	<i>Years of coverage</i>	<i>Factor (percent)</i>	26	50	27	60	28	70	29	80																		
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26	50																												
27	60																												
28	70																												
29	80																												
	Enacted in 1988																												
1989	5 percent added to factor for each year of coverage over 20.																												
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21	45																												
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26	70																												
27	75																												
28	80																												
29	85																												
1991	Earnings required for a year of substantial coverage (decoupled from the definition of a year of coverage for special minimum PIA). ^b																												
	<table border="0"> <thead> <tr> <th style="text-align: left;"><i>Year</i></th> <th style="text-align: center;"><i>Earnings (dollars)</i></th> </tr> </thead> <tbody> <tr><td>1991</td><td style="text-align: center;">9,900</td></tr> <tr><td>1992</td><td style="text-align: center;">10,350</td></tr> <tr><td>1993</td><td style="text-align: center;">10,725</td></tr> <tr><td>1994</td><td style="text-align: center;">11,250</td></tr> <tr><td>1995</td><td style="text-align: center;">11,325</td></tr> <tr><td>1996</td><td style="text-align: center;">11,625</td></tr> <tr><td>1997</td><td style="text-align: center;">12,150</td></tr> <tr><td>1998</td><td style="text-align: center;">12,675</td></tr> <tr><td>1999</td><td style="text-align: center;">13,425</td></tr> <tr><td>2000</td><td style="text-align: center;">14,175</td></tr> <tr><td>2001</td><td style="text-align: center;">14,925</td></tr> <tr><td>2002</td><td style="text-align: center;">15,750</td></tr> <tr><td>2003</td><td style="text-align: center;">16,125</td></tr> </tbody> </table>	<i>Year</i>	<i>Earnings (dollars)</i>	1991	9,900	1992	10,350	1993	10,725	1994	11,250	1995	11,325	1996	11,625	1997	12,150	1998	12,675	1999	13,425	2000	14,175	2001	14,925	2002	15,750	2003	16,125
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a. Reduction in PIA will not be greater than one-half of the periodic payment based on noncovered employment performed after 1956.

b. See Table 2.A12. Before 1991, a year of substantial coverage for WEP was the same amount as for the minimum PIA (25 percent of the "old law" contribution and benefit base). For 1991 and following, a year of substantial coverage under WEP provisions remains 25 percent of the old law base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year enacted	Number of years of coverage	PIA computation		
1972	For 1937–1950, the number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900 After 1950, the number of years with creditable earnings equal to at least 25 percent of the effective annual maximum taxable earnings, that is:			<i>Maximum amount^a for workers with 30 or more years of coverage (dollars)</i>
	<i>Year</i>	<i>Amount (dollars)</i>	<i>Effective date</i>	<i>Amount^a per year of coverage over 10 years (dollars)</i>
			January 1973	8.50
	1951–1954	900		
	1955–1958	1,050		
	1959–1965	1,200		
	1966–1967	1,650		
	1968–1971	1,950		
	1972	2,250		
	1973	2,700		
	1974	3,300		
	1975	3,525		
	1976	3,825		
	1977	4,125		
	1978	4,425		
1973	...			
			<i>Effective date</i>	<i>Amount^a per year of coverage over 10 years (dollars)</i>
			March 1974	9.00
1977 ^b	After 1978, the number of years with creditable earnings equal to at least 25 percent of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is:		<i>Effective date</i>	<i>Maximum amount^a for workers with 30 or more years of coverage (dollars)</i>
	<i>Year</i>	<i>Amount (dollars)</i>		<i>Amount^a per year of coverage over 10 years (dollars)</i>
			January 1979	11.50
	1979	4,725	June 1979	^c 12.64
	1980	5,100	June 1980	^c 14.45
	1981	5,500	June 1981	^c 16.07
	1982	6,075	June 1982	^c 17.26
	1983	6,675	December 1983	^c 17.86
	1984	7,050	December 1984	^c 18.49
	1985	7,425	December 1985	^c 19.06
	1986	7,875	December 1986	^c 19.31
	1987	8,175	December 1987	^c 20.12
	1988	8,400	December 1988	^c 20.92
	1989	8,925	December 1989	^c 21.90
	1990	9,525	December 1990	^c 23.08
			December 1991	^c 23.93
			December 1992	^c 24.65
			December 1993	^c 25.29
			December 1994	^c 26.00
			December 1995	^c 26.68
			December 1996	^c 27.45
			December 1997	^c 28.03
			December 1998	^c 28.39
			December 1999	^{c,d} 29.10
			December 2000	^c 30.12
			December 2001	^c 30.90
			December 2002	^c 31.33

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

... = not applicable.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

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

... = not available.

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

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

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

b. Applicability of formula limited to workers with initial entitlement before July 1980, as a result of 1980 amendments.

c. Calculated amount subject to cost-of-living adjustments beginning with the one effective for June of the year of first eligibility.

d. Formula for computing maximum family benefit revised effective for workers with initial entitlement in or after July 1980. New formula remains unchanged for workers eligible in successive calendar years because it has no bend points requiring adjustments.

e. Calculated amount subject to cost-of-living adjustments beginning with the one effective in year of first eligibility (or in 1981, if later).

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

(Continued)

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

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

(Continued)

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

AMW (dollars)	December 1985	December 1986	December 1987	December 1988	December 1989	December 1990	December 1991	December 1992	December 1993	December 1994
First 110	257.44	260.79	271.74	282.61	295.89	311.87	323.41	333.11	341.77	351.34
Next 290	93.62	94.84	98.82	102.77	107.60	113.42	117.62	121.15	124.30	127.78
Next 150	87.50	88.64	92.36	96.05	100.56	105.99	109.91	113.21	116.15	119.40
Next 100	102.88	104.22	108.60	112.94	118.25	124.64	129.25	133.13	136.59	140.41
Next 100	57.22	57.96	60.39	62.81	65.76	69.31	71.87	74.03	75.95	78.08
Next 250	47.67	48.29	50.32	52.33	54.79	57.75	59.89	61.69	63.29	65.06
Next 175	42.95	43.51	45.34	47.15	49.37	52.04	53.97	55.59	57.04	58.64
Next 100	39.78	40.30	41.99	43.67	45.72	48.19	49.97	51.47	52.81	54.29
Next 100	37.36	37.85	39.44	41.02	42.95	45.27	46.94	48.35	49.61	51.00
Next 100	35.30	35.76	37.26	38.75	40.57	42.76	44.34	45.67	46.86	48.17
Next 435	33.14	33.57	34.98	36.38	38.09	40.15	41.64	42.89	44.01	45.24
Next 250	30.16	30.55	31.83	33.10	34.66	36.53	37.88	39.02	40.03	41.15
Next 315	26.39	26.73	27.85	28.96	30.32	31.96	33.14	34.13	35.02	36.00
Next 225	23.72	24.03	25.04	26.04	27.26	28.73	29.79	30.68	31.48	32.36
Next 275	22.08	22.37	23.31	24.24	25.38	26.75	27.74	28.57	29.31	30.13
Next 175	21.34	21.62	22.53	23.43	24.53	25.85	26.81	27.61	28.33	29.12
Next 150	20.63	20.90	21.78	22.65	23.71	24.99	25.91	26.69	27.38	28.15
Next 200	20.00	20.26	21.11	21.95	22.98	24.22	25.12	25.87	26.54	27.28
Next 150	...	20.00	20.84	21.67	22.69	23.92	24.81	25.55	26.21	26.94
Next 100	...	...	20.00	20.80	21.78	22.96	23.81	24.52	25.16	25.86
Next 250	...	...	...	20.00	20.94	22.07	22.89	23.58	24.19	24.87
Next 275	...	...	...	...	20.00	21.08	21.86	22.52	23.11	23.76
Next 175	...	...	...	...	...	20.00	20.74	21.36	21.92	22.53
Next 175	...	...	...	...	...	...	20.00	20.60	21.14	21.73
Next 175	...	...	...	...	...	...	...	20.00	20.52	21.13
Next 250	...	...	...	...	...	...	...	...	20.00	21.09
Next 50	...	...	...	...	...	...	...	...	...	20.56
Percentage increase in PIA	3.1	1.3	4.2	4.0	4.7	5.4	3.7	3.0	2.6	2.8

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year enacted	Effective date	Minimum PIA ^a (dollars)	Maximum family benefit	
			Percentage of AMW	Not less than—
1935	...	10.00	...	...
1939	...	...	Lesser of 80%, \$85, or 200% of PIA	\$20.00
1950	September 1950	20.00	80% of first \$187.50	\$40.00
1952	September 1952	25.00	80% of first \$210.93	\$45.00
1954	September 1954	30.00	80% of first \$250	\$50.00 or 150% of PIA
1958	January 1959	33.00	80% of first \$317.50	\$20.00 + PIA or 150% of PIA
1961	August 1961	40.00	...	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 ^b	...
1972	September 1972	84.50	105.6% of first \$436 + 52.8% of next \$191 ^b	...
1973 ^c	June 1974	89.50	111.8% of first \$436 + 55.9% of next \$191 ^b	...
1973 ^d	March 1974	90.50	113.0% of first \$436 + 56.5% of next \$191 ^b	...
	June 1974	93.80	117.2% of first \$436 + 58.6% of next \$191 ^b	...
	June 1975	101.40	126.6% of first \$436 + 63.3% of next \$191 ^b	...
	June 1976	107.90	134.7% of first \$436 + 67.3% of next \$191 ^b	...
	June 1977	114.30	142.6% of first \$436 + 71.3% of next \$191 ^b	...
	June 1978	121.80	151.9% of first \$436 + 76.0% of next \$191 ^b	...
	June 1979	133.90	167.0% of first \$436 + 83.5% of next \$191 ^b	...
	June 1980	153.10	190.9% of first \$436 + 95.4% of next \$191 ^b	...
	June 1981	170.30	212.2% of first \$436 + 106.1% of next \$191 ^b	...
1981 ^e	March 1982	f	...	...
1981	June 1982	182.90	227.9% of first \$436 + 114.0% of next \$191 ^b	...
	December 1983	189.30	235.9% of first \$436 + 118.0% of next \$191 ^b	...
	December 1984	195.90	244.2% of first \$436 + 122.1% of next \$191 ^b	...
	December 1985	201.90	251.8% of first \$436 + 125.9% of next \$191 ^b	...
	December 1986	204.50	255.1% of first \$436 + 127.5% of next \$191 ^b	...
	December 1987	213.00	265.8% of first \$436 + 132.9% of next \$191 ^b	...
	December 1988	221.50	276.4% of first \$436 + 138.2% of next \$191 ^b	...
	December 1989	231.90	289.4% of first \$436 + 144.7% of next \$191 ^b	...
	December 1990	244.40	305.0% of first \$436 + 152.5% of next \$191 ^b	...
	December 1991	253.40	316.3% of first \$436 + 158.1% of next \$191 ^b	...
	December 1992	261.00	325.8% of first \$436 + 162.8% of next \$191 ^b	...
	December 1993	267.70	334.3% of first \$436 + 167.0% of next \$191 ^b	...
	December 1994	275.10	343.7% of first \$436 + 171.7% of next \$191 ^b	...
	December 1995	282.20	352.6% of first \$436 + 176.2% of next \$191 ^b	...
	December 1996	290.30	362.8% of first \$436 + 181.3% of next \$191 ^b	...
	December 1997	296.30	370.4% of first \$436 + 185.1% of next \$191 ^b	...
	December 1998	300.10	375.2% of first \$436 + 187.5% of next \$191 ^b	...
	December 1999 ^g	307.60	384.6% of first \$436 + 192.2% of next \$191 ^b	...
	December 2000	318.30	398.1% of first \$436 + 198.9% of next \$191 ^b	...
	December 2001	326.50	408.5% of first \$436 + 204.1% of next \$191 ^b	...
	December 2002	331.00	414.2% of first \$436 + 206.9% of next \$191 ^b	...

a. Based on earnings; subject to reduction if claimed before age 65.

b. For AMW of \$628 or more, 175 percent of PIA.

c. Superseded by 1973 legislation.

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

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

f. Minimum PIA eliminated by 1981 legislation.

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions

Year enacted	Provision
	<i>Quarter of coverage</i>
1977	Mandatory annual determination, beginning in 1978, as to whether or not an adjustment is required in the amount of wages and self-employment earnings an individual needs in order to be credited with a quarter of coverage (QC) in the succeeding year. The amount required for a QC is the product of \$250 (in effect in 1978) multiplied by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for 1976 (see Table 2.A8 for average annual wages after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new amount required for a QC. In no case, however, is the new amount reduced below the amount in effect in the year of determination.
	<i>Maximum amount of taxable and creditable earnings</i>
1972	The 1972 Act (as modified by the 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. The determination in the years after 1975 is made by multiplying the "maximum" in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the maximum was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid after the year of determination and with respect to taxable years beginning after that year. In no case, however, is the maximum reduced to an amount below the maximum in the year of determination.
1976	In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975.
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 section 401(k) pension plans, in the average annual average wage.
1994	The determination for years after 1994 is made by multiplying \$60,600, the "maximum" for 1994, by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See Table 2.A8 for annual amounts of the national average wage index.) The resulting product, rounded to the nearest \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid in (and taxable years beginning in) the year following the year the determination is made. In no case, however, is the new maximum reduced to an amount below the maximum in the year of determination.
	<i>Benefits Computation</i>
1977	New benefit computation method based on average indexed monthly earnings (AIME) after 1950, effective for workers first eligible after 1978. Provision for automatic adjustment of the dollar amounts, or bend points, defining (1) the AIME brackets in the PIA formula (see Table 2.A11) and (2) the PIA brackets in the maximum family benefit formula (see Table 2.A13). New bend points are established by multiplying the bend points in effect in 1979—\$180 and \$1,085 for the PIA formula and \$230, \$332, and \$433 for the maximum family benefit formula—by the following quotient: the national average wage for the second year before the year for which the determination was made, divided by the average wage for 1977 (see Table 2.A8 for average annual wages after 1950). The resulting products, rounded to the nearest dollar, are the new bend points.
1980	Modified maximum family benefit formula applicable to workers with initial entitlement to disability benefits in or after July 1980 (see Table 2.A14). New formula for disabled workers has no bend points subject to automatic adjustment.
	<i>Cost-of-living increase</i>
1972	Under the original provisions (based on 1972 and 1973 legislation), the arithmetical mean of the consumer price index (CPI) for January, February, and March in the year of determination was compared with the arithmetical mean of the CPI for the later of (a) January, February, and March of the year in which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. (Before the introduction, in 1977, of the alternative CPI series for "all urban consumers," or the CPI-U, the CPI-W was referred to as the CPI.) If the percentage increase in the CPI, rounded to the nearest one-tenth of 1 percent, was at least 3.0 (the triggering requirement), a cost-of-living benefit increase was established and the level of benefits was increased by the same percentage, effective for June of the year in which the determination was made.
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. The 1983 Act also introduced an alternative method for determining the size of a cost-of-living adjustment. This method, called the stabilizer provision, is applied when the ratio of the combined OASDI trust fund assets to estimated outgo falls below a certain percentage. The "triggering" percentage is 15 percent for 1985–1988 and 20 percent for years after 1988. Under these circumstances, the cost-of-living adjustment is based on the lesser of the CPI-W percentage increase determined above or the increase in average wages. The latter increase is the percentage, rounded to the nearest one-tenth of 1 percent by which the national average wage for the year before the year of determination exceeds the average wage for the year before the most recent year in which either a cost-of-living increase or a general benefit increase occurred. (See Table 2.A8 for the annual amount of the average wage after 1950 and footnote a in that table for the underlying data sources.) 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.)
1986	Triggering requirement eliminated for cost-of-living increases in and after 1986 by P.L. 99-509 (signed October 21, 1986).
2001	The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits were calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions—Continued

Year enacted	Provision
Earnings test	
1972	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. The determination in the years after 1975 is made by multiplying the monthly exempt amount in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the exempt amount was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950.) The resulting product, rounded to the nearest multiple of \$10, is the new monthly exempt amount, effective with respect to remuneration paid after the year of determination and with respect to taxable year beginning after that year. In no case, however, is the new exempt amount reduced below the exempt amount in the year of determination. The new annual exempt amount is determined by multiplying the new monthly amount by 12.
1976	In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975.
1994	The determination for years after 1994 is made by multiplying the monthly exempt amounts in effect for 1994 (\$930 for beneficiaries who have, \$670 for beneficiaries who have not yet, reached "full retirement age"; see footnote <i>f</i> in Table 2.A29) by the following quotient: the national average wage for the year before the year in which the determination is made, divided by the national average wage for 1992. (See Table 2.A8 for annual amounts of the national average wage.) The resulting products, rounded to the nearest \$10, are the new monthly exempt amounts effective for the year following the year the determination is made. The new annual exempt amounts are determined by multiplying the new monthly amounts by 12.
1996	Public Law 104-121, enacted March 29, 1996, suspended the automatic indexing of the exempt amounts through the year 2002 for workers aged 65–69. It legislated ad hoc increases in the annual exempt amounts to \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. Thereafter, the exempt amounts will increase automatically based on the annual increase in the national average wage as under the 1994 legislation.
2000	Public Law 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

(Continued)

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

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

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

... = not applicable.

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2.A OASDI: Benefit Types and Levels

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

Year enacted	Age	Percentage of PIA	Condition or qualification																																	
Retired worker																																				
1935	65 or older	100	Fully insured. Amount based on cumulative wages.																																	
1939	Amount based on PIA.																																	
1956	Women: 62–64	...	Reduced 5/9 of 1% for each month under age 65.																																	
1961	Men: 62–64	...	Reduced 5/9 of 1% for each month under age 65.																																	
1972	Increased 1/12 of 1% for each month between ages 65 and 72 for which no benefits received after 1970 (PIA based on AMW only). Applicable only to worker whose benefit has not been actuarially reduced.																																	
1977	Increased 1/4 of 1% for each month after 1981 and between ages 65 and 72 in which no benefits received. Requirement for nonreceipt of actuarially reduced benefit removed.																																	
1983	65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border: none;"> <thead> <tr> <th style="text-align: left;"><i>Applicable PIA payable at age—</i></th> <th style="text-align: left;"><i>Applicable to workers who attain age 62 in—</i></th> </tr> </thead> <tbody> <tr><td>65 and 2 months</td><td>2000</td></tr> <tr><td>65 and 4 months</td><td>2001</td></tr> <tr><td>65 and 6 months</td><td>2002</td></tr> <tr><td>65 and 8 months</td><td>2003</td></tr> <tr><td>65 and 10 months</td><td>2004</td></tr> <tr><td>66</td><td>2005–2016</td></tr> <tr><td>66 and 2 months</td><td>2017</td></tr> <tr><td>66 and 4 months</td><td>2018</td></tr> <tr><td>66 and 6 months</td><td>2019</td></tr> <tr><td>66 and 8 months</td><td>2020</td></tr> <tr><td>66 and 10 months</td><td>2021</td></tr> <tr><td>67</td><td>2022 and later</td></tr> </tbody> </table>	<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>	65 and 2 months	2000	65 and 4 months	2001	65 and 6 months	2002	65 and 8 months	2003	65 and 10 months	2004	66	2005–2016	66 and 2 months	2017	66 and 4 months	2018	66 and 6 months	2019	66 and 8 months	2020	66 and 10 months	2021	67	2022 and later							
<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>																																			
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66 and 2 months	2017																																			
66 and 4 months	2018																																			
66 and 6 months	2019																																			
66 and 8 months	2020																																			
66 and 10 months	2021																																			
67	2022 and later																																			
	62–66	...	Reduced 5/9 of 1% for each of the first 36 months of receipt of benefits immediately preceding the age at which 100% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.																																	
	Increased by the following percentage for each month between the age at which 100% of PIA is payable and age 70 in which no benefits are received: <table style="margin-left: 40px; border: none;"> <thead> <tr> <th style="text-align: left;"><i>Age 62 in years—</i></th> <th style="text-align: left;"><i>Rate of increase</i></th> <th style="text-align: left;"><i>Annual rate (percent)</i></th> </tr> </thead> <tbody> <tr><td>1987–1988</td><td>7/24 of 1%</td><td>3.5</td></tr> <tr><td>1989–1990</td><td>1/3 of 1%</td><td>4</td></tr> <tr><td>1991–1992</td><td>9/24 of 1%</td><td>4.5</td></tr> <tr><td>1993–1994</td><td>10/24 of 1%</td><td>5</td></tr> <tr><td>1995–1996</td><td>11/24 of 1%</td><td>5.5</td></tr> <tr><td>1997–1998</td><td>1/2 of 1%</td><td>6</td></tr> <tr><td>1999–2000</td><td>13/24 of 1%</td><td>6.5</td></tr> <tr><td>2001–2002</td><td>14/24 of 1%</td><td>7</td></tr> <tr><td>2003–2004</td><td>15/24 of 1%</td><td>7.5</td></tr> <tr><td>2005 and later</td><td>2/3 of 1%</td><td>8</td></tr> </tbody> </table>	<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate (percent)</i>	1987–1988	7/24 of 1%	3.5	1989–1990	1/3 of 1%	4	1991–1992	9/24 of 1%	4.5	1993–1994	10/24 of 1%	5	1995–1996	11/24 of 1%	5.5	1997–1998	1/2 of 1%	6	1999–2000	13/24 of 1%	6.5	2001–2002	14/24 of 1%	7	2003–2004	15/24 of 1%	7.5	2005 and later	2/3 of 1%	8
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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	...	Disability insured. Waiting period of 6 calendar months. Reduced by amount of workers' compensation.																																	
1958	Reduction for workers' compensation eliminated.																																	
1960	Under 50																																	
1965	Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high-5 year average taxable earnings in covered employment. Adjusted periodically for rises in wage levels.																																	
1967	Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high 5-year average earnings in covered employment, regardless of taxable limit.																																	
1972	Reduced if benefits plus workers' compensation exceed 80% of the highest of (a) AMW, (b) high 5-year average earnings or (c) highest annual earnings in the period consisting of year of disability onset and 5 preceding years in covered employment.																																	
	Waiting period reduced to 5 full calendar months.																																	
1983	Partial offset for receipt of pension based on noncovered employment phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985.																																	

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: ... = not applicable.

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

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Wife			
1939	65 or older	50	Fully insured.
1956	62–64	...	Reduced 25/36 of 1% for each month under age 65.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Divorced wife			
1965	65 or older	...	Fully insured. Dependent. Married 20 years. Not counted toward family maximum.
	62–64	...	Reduced 25/36 of 1% for each month under age 65.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1972	...	...	Dependency requirement eliminated.
1977	...	...	Married 10 years.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if he applied. Effective with benefits for months after December 1984.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Wife (mother)			
1950	Under 65	...	Fully insured. Caring for eligible child.
1965	...	...	Eligible child excludes student aged 18–21.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Child			
1939	Under 18	...	Fully insured. ^a
1965	18–21	...	Full-time student.
1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
	...	...	Includes grandchild under certain circumstances.
1981	18–22	...	Student benefits eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
1996	...	...	Stepchildren must be dependent on worker.
Disabled child			
1956	18 or older	...	Fully insured. ^a Disabled before age 18.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.

(Continued)

2.A OASDI: Benefit Types and Levels

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Husband			
1950	65 or older	50	Fully and currently insured. Dependent.
1961	62–64	...	Reduced 25/36 of 1% for each month under age 65.
1967	...	...	Currently insured requirement eliminated. Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Dependency requirement eliminated.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and dependent.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Divorced husband			
1977 ^b	65 or older	...	Fully insured. Married 10 years. Not counted toward family maximum.
	62–64	...	Reduced 25/36 of 1% for each month under age 65.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible after June 1983.
	...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if she applied. Effective with benefits for months after December 1984.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Husband (father)			
1978 ^c	Under 65	...	Fully insured. Caring for eligible child. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

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

b. Northern District of California District Court decision in *Oliver v. Califano*, June 24, 1977. Statutory change enacted in 1983.

c. Eastern District of Pennsylvania District Court decision in *Cooper v. Califano*, December 29, 1978. Statutory change enacted in 1983.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: ... = not applicable.

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

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Widow			
1939	65 or older	75	Fully insured.
1956	62–64	...	...
1961	...	82.5	...
1965	60–61	...	Reduced 5/9 of 1% for each month under age 62.
1972	65 or older	100	Limited, if husband retired before age 65, to amount husband would be receiving if still living, but not less than 82 1/2% of PIA.
	60–64	...	Reduced 19/40 of 1% each month under age 65. In addition, for a widow aged 62–64 whose husband retired before age 65 limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
1977	...	...	Increased by any delayed retirement credit husband would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased, as follows:
			<i>Applicable PIA payable at age—</i>
			<i>Applicable to widows who attain age 60 in—</i>
			65 and 2 months 2000
			65 and 4 months 2001
			65 and 6 months 2002
			65 and 8 months 2003
			65 and 10 months 2004
			66 2005–2016
			66 and 2 months 2017
			66 and 4 months 2018
			66 and 6 months 2019
			66 and 8 months 2020
			66 and 10 months 2021
			67 2022 and later
	60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Disabled widow			
1967	50–59	82.5	Fully insured. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 60. Includes divorced wife, dependent and married 20 years.
1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60.
1977	...	...	Increased by any delayed retirement credit husband would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced wife			
1965	60 or older	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1% for each month under age 62.
1972	65 or older	100	Limited, if former husband retired before age 65, to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
	60–64	...	Reduced 19/40 of 1% for each month under age 65. In addition, for widow aged 62–64 whose former husband retired before age 65, limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
1977	...	...	Dependency requirement eliminated.
	...	...	Increased by any delayed retirement increment former husband would be receiving.
	...	...	Married 10 years.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widow).
	60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

2.A OASDI: Benefit Types and Levels

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Disabled surviving divorced wife			
1967	50–59	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 62.
1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60.
	...	...	Dependency requirement eliminated.
1977	...	...	Increased by any delayed retirement increment husband (or former husband) would be receiving.
	...	...	Married 10 years.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Widowed mother			
1939	Under 65	75	Fully or currently insured. Caring for eligible child.
1965	...	...	Eligible child excludes student over age 18.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced mother			
1950	Under 65	75	Fully or currently insured. Caring for eligible child. Dependent. Not counted toward family maximum.
1965	...	...	Eligible child excludes student over age 18.
1972	...	...	Dependency requirement eliminated.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Child			
1939	Under 18	50	Fully or currently insured. ^a Student aged 16–17.
1946	...	...	Student requirement eliminated.
1950	...	...	Plus 25% of PIA divided among the children.
1960	...	75	Additional 25% of PIA eliminated.
1965	...	...	Full-time student.
1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
	...	...	Includes grandchild under certain circumstances.
1981	18–22	...	Student category eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
1996	...	...	Stepchildren must be dependent on worker.
Disabled child			
1956	18 or older	50	Fully or currently insured. ^a Disabled before age 18. Plus 25% of PIA divided among the children.
1960	...	75	Additional 25% of PIA eliminated.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.
Parent			
1939	65 or older	50	Fully insured. Dependent. No surviving widow or child under age 18.
1946	...	...	No surviving eligible widow or child.
1950	...	75	...
1956	62–64	...	Women.
1958	...	...	No-other-survivor requirement eliminated.
1961	62 or older	82.5	75% each if two parents.

(Continued)

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Widower			
1950	65 or older	75	Fully and currently insured. Dependent.
1961	62 or older	82.5	...
1967	...	...	Currently insured requirement eliminated.
1972	65 or older	100	Limited, if wife retired before age 65, to amount wife would be receiving if still living, but not less than 82 1/2% of PIA.
	60–64	...	Reduced 19/40 of 1% for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2% of PIA.
1977	...	...	Dependency requirement eliminated.
	...	...	Increased by any delayed retirement increment wife would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60.
	...	...	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.
1983	65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widow).
	60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Disabled widower			
1967	50–61	82.5	Fully insured. Dependent. Reduced 5/9 of 1% per month between ages 60–62, plus 43/198 of 1% for each month under age 60.
1972	50–59	100	Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. Disability requirement eliminated for ages 60–61.
	...	...	Dependency requirement eliminated.
1977	...	...	Increased by any delayed retirement increment wife would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60.
	...	...	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.
1983	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced husband			
1980 ^b	65 or older	100	Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Limited, if former wife retired before age 65, to amount she would be receiving if still living, but not less than 82 1/2% of PIA. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
	60–64	...	Reduced 19/40 of 1% for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2% of PIA.
	...	...	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	65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widow).
	60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Disabled surviving divorced husband			
1980 ^b	50–59	100	Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered employment (noncovered pension offset).
	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Widowed father			
1975 ^c	Under 65	75	Fully or currently insured. Caring for eligible child under age 18.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset to two-thirds of such pension.

(Continued)

2.A OASDI: Benefit Types and Levels

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Surviving divorced father			
1979 ^d	Under 65	75	Fully or currently insured. Caring for eligible child under age 18. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

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

b. Oregon District Court decision in *Ambrose v. Harris*, July 17, 1980. Statutory change enacted in 1983.

c. Supreme Court decision in *Weinberger v. Wiesenfeld*, March 19, 1975. Statutory change enacted in 1983.

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: ... = not applicable.

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

2.A OASDI: Benefit Types and Levels

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

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

a. Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.

b. Provision for future automatic cost-of-living adjustments.

c. Suspended by 1973 legislation.

d. Beginning June 1975, subject to automatic cost-of-living adjustments. Benefits no longer available to persons receiving payments under Supplemental Security Income program.

e. Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.

f. Effective for applications after November 5, 1990.

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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2.A OASDI: Benefit Types and Levels

Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2002, by average indexed monthly earnings for stipulated yearly wage levels, effective December 2002 (in dollars)

Beneficiary family	Federal minimum wage ^a	75% of average wage	Average wage ^b	150% of average wage	Maximum taxable earnings ^c
Retired-worker families^d					
Average indexed monthly earnings	1,257.00	2,011.00	2,681.00	3,928.00	5,499.00
Primary insurance amount	756.00	1,000.60	1,218.00	1,560.40	1,799.40
Maximum family benefit	1,134.00	1,786.30	2,224.90	2,731.50	3,149.70
Monthly benefit amount for retired worker claiming benefits at age 62					
Worker alone	585.00	775.00	943.00	1,209.00	1,394.00
Worker with spouse claiming benefits at—					
Age 65 or older	963.00	1,275.00	1,552.00	1,989.00	2,293.00
Age 62	859.00	1,137.00	1,384.00	1,774.00	2,046.00
Survivor families^e					
Average indexed monthly earnings	1,027.00	2,013.00	2,684.00	4,026.00	6,534.00
Primary insurance amount	681.40	1,001.30	1,219.00	1,575.30	1,956.80
Maximum family benefit	1,022.10	1,788.20	2,226.20	2,757.60	3,425.10
Monthly benefit amount for survivor of worker deceased at age 40					
1 surviving child	511.00	750.00	914.00	1,181.00	1,467.00
Widowed mother or father and 1 child	1,022.00	1,500.00	1,828.00	2,362.00	2,934.00
Widowed mother or father and 2 children	1,020.00	1,788.00	2,226.00	2,757.00	3,423.00
Disabled-worker families^f					
Average indexed monthly earnings	1,163.00	2,011.00	2,682.00	4,023.00	6,321.00
Primary insurance amount	725.50	1,000.60	1,218.40	1,574.90	1,924.40
Maximum family benefit ^g	1,002.30	1,500.90	1,827.60	2,362.40	2,886.60
Monthly benefit amount for disabled worker age 50					
Worker alone	725.00	1,000.00	1,218.00	1,574.00	1,924.00
Worker, spouse, and 1 child	1,001.00	1,500.00	1,826.00	2,360.00	2,886.00

a. Annual earnings are calculated by multiplying the federal minimum wage by 2,080 hours (see Table 3.B3). Increases in the minimum wage during the year are prorated.

b. See Table 2.A8.

c. See Table 2.A9.

d. Assumes the worker began to work at age 22, retired at age 62 in 2002 with maximum reduction, and had no prior period of disability.

e. Assumes the deceased worker began to work at age 22, died in 2002 at age 40, had no earnings in that year, and had no prior period of disability.

f. Assumes the worker began to work at age 22, became disabled at age 50 in 2002, had no earnings in that year, and had no prior period of disability.

g. The 1980 Amendments to the Social Security Act provide for a different family maximum amount in disability cases. For disabled workers entitled after June 1980, the maximum is the smaller of (1) 85 percent of the worker's AIME (or 100 percent of the PIA, if larger) or (2) 150 percent of the PIA.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, by year they attained age 62, 1957–2003 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2002 ^b	At retirement		Effective December 2002 ^b	
			Men	Women	Men	Women
1957	24.00	311.80	...	86.80	...	768.60
1958	24.00	311.80	...	86.80	...	768.60
1959	26.40	311.80	...	92.80	...	768.00
1960	26.40	310.40	...	95.20	...	788.40
1961	26.40	308.70	...	96.00	...	794.10
1962	32.00	307.80	93.60	96.80	774.50	801.10
1963	32.00	306.20	94.40	97.60	779.80	806.40
1964	32.00	306.20	95.20	98.40	784.80	811.70
1965	35.20	305.80	102.80	105.40	789.10	809.90
1966	35.20	303.20	102.80	106.20	786.40	812.80
1967	35.20	301.40	105.40	108.80	804.00	829.30
1968	^c 44.00	297.50	^c 121.00	^c 124.80	808.00	834.40
1969	44.00	294.60	124.80	128.40	825.50	849.60
1970	51.20	290.40	146.80	151.90	833.40	862.20
1971	56.40	286.50	163.60	170.50	832.20	867.90
1972	56.40	282.50	167.10	172.90	838.80	867.90
1973	67.60	278.60	207.60	212.90	854.50	877.20
1974	67.60	274.10	217.00	219.70	880.90	891.30
1975	75.10	270.50	253.10	253.10	911.90	911.90
1976	81.20	267.30	285.60	285.60	941.60	941.60
1977	86.40	265.30	319.40	319.40	983.00	983.00
1978	91.50	264.10	354.60	354.60	1,028.10	1,028.10
1979	97.60	265.20	^d 388.90	^d 388.90	1,058.90	1,058.90
1980	97.60	241.00	^d 402.80	^d 402.80	997.80	997.80
1981	97.60	210.50	432.00	432.00	935.90	935.90
1982	^e	^e	474.60	474.60	924.90	924.90
1983	^e	^e	526.40	526.40	954.80	954.80
1984	^e	^e	559.40	559.40	980.50	980.50
1985	^e	^e	591.30	591.30	1,001.80	1,001.80
1986	^e	^e	630.50	630.50	1,036.00	1,036.00
1987	^e	^e	662.10	662.10	1,074.00	1,074.00
1988	^e	^e	686.70	686.70	1,069.10	1,069.10
1989	^e	^e	734.00	734.00	1,098.70	1,098.70
1990	^e	^e	774.60	774.60	1,107.60	1,107.60
1991	^e	^e	810.00	810.00	1,098.90	1,098.90
1992	^e	^e	854.10	854.10	1,117.70	1,117.70
1993	^e	^e	893.60	893.60	1,135.40	1,135.40
1994	^e	^e	948.00	948.00	1,174.00	1,174.00
1995	^e	^e	965.90	965.90	1,163.70	1,163.70
1996	^e	^e	999.90	999.90	1,174.20	1,174.20
1997	^e	^e	1,049.10	1,049.10	1,197.40	1,197.40
1998	^e	^e	1,109.60	1,109.60	1,240.50	1,240.50
1999	^e	^e	1,183.60	1,183.60	^f 1,306.10	^f 1,306.10
2000	^e	^e	1,241.70	1,241.70	1,336.90	1,336.90
2001	^e	^e	1,307.30	1,307.30	1,359.90	1,359.90
2002	^e	^e	1,375.30	1,375.30	1,394.50	1,394.50
2003	^e	^e	1,404.30	1,404.30	...	...

a. Assumes the worker began to work at age 22, retired at the beginning of the year, had no prior disability, and received the maximum reduction. Through 1999 the assumed reduction was 36 months at 5/9 of 1 percent per month or 20 percent. In 2001, with the increase in the full retirement age to 65 and 2 months, the reduction increased to 20.008333 percent (see Table 2.A20). In 2002 the full retirement age increased to 65 and 4 months for a maximum reduction to 21.666667 percent. In 2002 the full retirement age increased to 65 and 6 months for a maximum reduction of 22.5 percent. In 2003 the full retirement age increased to 65 and 8 months for a maximum reduction of 23.333333 percent.

b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.

c. Effective February 1968.

d. Derived from transitional guarantee computation based on 1978 PIA table.

e. Minimum PIA eliminated by 1981 legislation for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who were under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

... = not applicable.

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

2.A OASDI: Benefit Types and Levels

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2003 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2002 ^b	At retirement		Effective December 2002 ^b	
			Men	Women	Men	Women
1940	10.00	330.70	41.20	41.20	641.30	641.30
1941	10.00	330.70	41.60	41.60	641.30	641.30
1942	10.00	330.70	42.00	42.00	648.90	648.90
1943	10.00	330.70	42.40	42.40	648.90	648.90
1944	10.00	330.70	42.80	42.80	648.90	655.90
1945	10.00	330.70	43.20	43.20	655.90	655.90
1946	10.00	330.70	43.60	43.60	663.80	663.80
1947	10.00	330.70	44.00	44.00	670.00	670.00
1948	10.00	330.70	44.40	44.40	670.00	670.00
1949	10.00	330.70	44.80	44.80	676.80	676.80
1950	10.00	330.70	45.20	45.20	685.20	685.20
1951	20.00	330.70	68.50	68.50	685.20	685.20
1952	20.00	330.70	68.50	68.50	685.20	685.20
1953	25.00	330.70	85.00	85.00	757.00	757.00
1954	25.00	330.70	85.00	85.00	757.00	757.00
1955	30.00	330.70	98.50	98.50	757.00	757.00
1956	30.00	330.70	103.50	103.50	799.80	799.80
1957	30.00	330.70	108.50	108.50	835.90	835.90
1958	30.00	330.70	108.50	108.50	835.90	835.90
1959	33.00	330.70	116.00	116.00	835.90	835.90
1960	33.00	330.70	119.00	119.00	856.90	856.90
1961	33.00	330.70	120.00	120.00	863.70	863.70
1962	40.00	330.70	121.00	123.00	871.60	886.40
1963	40.00	330.70	122.00	125.00	878.50	899.70
1964	40.00	330.70	123.00	127.00	886.40	914.70
1965	44.00	330.70	131.70	135.90	886.40	914.70
1966	44.00	330.70	132.70	135.90	892.90	914.70
1967	44.00	330.70	135.90	140.00	914.70	941.80
1968	^c 55.00	330.70	^c 156.00	^c 161.60	928.50	961.90
1969	55.00	330.70	160.50	167.30	955.70	995.80
1970	64.00	330.70	189.80	196.40	982.40	1,017.40
1971	70.40	330.70	213.10	220.40	1,002.50	1,036.10
1972	70.40	330.70	216.10	224.70	1,017.40	1,057.10
1973	84.50	330.70	266.10	276.40	1,043.30	1,083.80
1974	84.50	330.70	274.60	284.90	1,076.10	1,117.00
1975	93.80	330.70	316.30	333.70	1,117.00	1,178.40
1976	101.40	330.70	364.00	378.80	1,189.40	1,237.90
1977	107.90	330.70	412.70	422.40	1,267.80	1,297.20
1978	114.30	330.70	459.80	459.80	1,333.70	1,333.70
1979	121.80	330.70	503.40	503.40	1,370.80	1,370.80
1980	133.90	330.70	572.00	572.00	1,417.30	1,417.30
1981	153.10	330.70	677.00	677.00	1,467.60	1,467.60
1982	^d 170.30	330.70	^d 679.30	^d 679.30	1,323.60	1,323.60
1983	^d 166.40	300.90	709.50	709.50	1,287.60	1,287.60
1984	^d 150.50	262.50	703.60	703.60	1,233.50	1,233.50
1985	^e	^e	717.20	717.20	1,215.20	1,215.20
1986	^e	^e	760.10	760.10	1,249.10	1,249.10
1987	^e	^e	789.20	789.20	1,280.50	1,280.50
1988	^e	^e	838.60	838.60	1,305.90	1,305.90
1989	^e	^e	899.60	899.60	1,346.80	1,346.80

(Continued)

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2003 (in dollars)—Continued

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2002 ^b	At retirement		Effective December 2002 ^b	
			Men	Women	Men	Women
1990	e	e	975.00	975.00	1,394.50	1,394.50
1991	e	e	1,022.90	1,022.90	1,388.10	1,388.10
1992	e	e	1,088.70	1,088.70	1,424.80	1,424.80
1993	e	e	1,128.80	1,128.80	1,434.30	1,434.30
1994	e	e	1,147.50	1,147.50	1,421.10	1,421.10
1995	e	e	1,199.10	1,199.10	1,444.60	1,444.60
1996	e	e	1,248.90	1,248.90	1,466.60	1,466.60
1997	e	e	1,326.60	1,326.60	1,514.20	1,514.20
1998	e	e	1,342.80	1,342.80	1,501.10	1,501.10
1999	e	e	1,373.10	1,373.10	^f 1,515.30	^f 1,515.30
2000	e	e	^f 1,435.30	1,435.30	^f 1,545.40	^f 1,545.40
2001	e	e	^f 1,538.20	^f 1,538.20	^f 1,600.10	^f 1,600.10
2002	e	e	^f 1,660.50	^f 1,660.50	^f 1,683.70	^f 1,683.70
2003 ^g	e	e	^g 1,721.70	^g 1,721.70	...	...

a. Assumes the worker began to work at age 22, retired at the beginning of the year, had no earnings after retirement, and had no prior period of disability.

b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.

c. Effective for February 1968.

d. Derived from transitional guarantee computation based on 1978 PIA table.

e. Minimum PIA eliminated by 1981 legislation for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who are under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)

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

g. Effective for workers retiring at age 65 in 2003, the age at which one can receive an unreduced benefit—the full retirement age (FRA)—has been raised from 65 to 65 and 2 months. Workers retiring at age 65 receive a benefit of \$1,721.70. Those entitled at age 65 and 2 months receive a benefit of \$1,741.10. See Table 2.A17.1 for reduction factors.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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

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

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^a
				Annual earnings (dollars)	Monthly wages ^b (dollars)	
For all beneficiaries						
1935	...	...	Covered	...	...	Full monthly benefit
1939	1940	...	...	...	14.99	...
1950	1951	Aged 75 or older	...	^c 600	50.00	...
1952	1953	...	...	^c 900	75.00	...
1954	1955	Aged 72 or older	All ^d	1,200	80.00	One month's full benefit for each \$80.00 or fraction thereof
1956	1958	Disabled	...	...	...	...
1958	1959	...	...	...	100.00	...
1960	1961	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,500
						\$1 for each \$1 of earnings above \$1,500
1961	1962	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,700
						\$1 for each \$1 of earnings above \$1,700
1965	1966	...	...	1,500	125.00	\$1 for each \$2 of earnings from \$1,501–\$2,700
						\$1 for each \$1 of earnings above \$2,700
1967	1968	...	...	1,680	140.00	\$1 for each \$2 of earnings from \$1,681–\$2,880
						\$1 for each \$1 of earnings above \$2,880
1972	1973	...	Up to age 72	2,100	175.00	\$1 for each \$2 of earnings above \$2,100
1973	1974	...	...	2,400	200.00	\$1 for each \$2 of earnings above \$2,400
	1975	...	...	^e 2,520	^e 210.00	\$1 for each \$2 of earnings above \$2,520
	1976	...	...	^e 2,760	^e 230.00	\$1 for each \$2 of earnings above \$2,760
	1977	...	...	^e 3,000	^e 250.00	\$1 for each \$2 of earnings above \$3,000
For beneficiaries who have not reached full retirement age ^f						
1977	1978	...	...	^e 3,240	^e 270.00	\$1 for each \$2 of earnings above \$3,240
	1979	...	...	^e 3,480	^e 290.00	\$1 for each \$2 of earnings above \$3,480
	1980	...	...	^e 3,720	^e 310.00	\$1 for each \$2 of earnings above \$3,720
	1981	...	...	^e 4,080	^e 340.00	\$1 for each \$2 of earnings above \$4,080
	1982	...	...	^e 4,440	^e 370.00	\$1 for each \$2 of earnings above \$4,440
	1983	...	...	^e 4,920	^e 410.00	\$1 for each \$2 of earnings above \$4,920
	1984	...	...	^e 5,160	^e 430.00	\$1 for each \$2 of earnings above \$5,160
	1985	...	...	^e 5,400	^e 450.00	\$1 for each \$2 of earnings above \$5,400
	1986	...	...	^e 5,760	^e 480.00	\$1 for each \$2 of earnings above \$5,760
	1987	...	...	^e 6,000	^e 500.00	\$1 for each \$2 of earnings above \$6,000
	1988	...	...	^e 6,120	^e 510.00	\$1 for each \$2 of earnings above \$6,120
	1989	...	...	^e 6,480	^e 540.00	\$1 for each \$2 of earnings above \$6,480
	1990	...	...	^e 6,840	^e 570.00	\$1 for each \$2 of earnings above \$6,840
	1991	...	...	^e 7,080	^e 590.00	\$1 for each \$2 of earnings above \$7,080
	1992	...	...	^e 7,440	^e 620.00	\$1 for each \$2 of earnings above \$7,440
	1993	...	...	^e 7,680	^e 640.00	\$1 for each \$2 of earnings above \$7,680
	1994	...	...	^e 8,040	^e 670.00	\$1 for each \$2 of earnings above \$8,040
	1995	...	...	^e 8,160	^e 680.00	\$1 for each \$2 of earnings above \$8,160
	1996	...	...	^e 8,280	^e 690.00	\$1 for each \$2 of earnings above \$8,280
	1997	...	...	^e 8,640	^e 720.00	\$1 for each \$2 of earnings above \$8,640
	1998	...	...	^e 9,120	^e 760.00	\$1 for each \$2 of earnings above \$9,120
	1999	...	...	^e 9,600	^e 800.00	\$1 for each \$2 of earnings above \$9,600
For beneficiaries who have reached full retirement age ^f						
1977	1978	...	...	^g 4,000	^g 333.33	\$1 for each \$2 of earnings above \$4,000
	1979	...	...	^g 4,500	^g 375.00	\$1 for each \$2 of earnings above \$4,500
	1980	...	...	^g 5,000	^g 416.66	\$1 for each \$2 of earnings above \$5,000
	1981	...	...	^g 5,500	^g 458.33	\$1 for each \$2 of earnings above \$5,500
	1982	...	...	^g 6,000	^g 500.00	\$1 for each \$2 of earnings above \$6,000
1981	1983	Aged 70 or older	Up to age 70	...	...	...
	1983	...	...	^e 6,600	^e 550.00	\$1 for each \$2 of earnings above \$6,600
	1984	...	...	^e 6,960	^e 580.00	\$1 for each \$2 of earnings above \$6,960
	1985	...	...	^e 7,320	^e 610.00	\$1 for each \$2 of earnings above \$7,320
	1986	...	...	^e 7,800	^e 650.00	\$1 for each \$2 of earnings above \$7,800
	1987	...	...	^e 8,160	^e 680.00	\$1 for each \$2 of earnings above \$8,160
	1988	...	...	^e 8,400	^e 700.00	\$1 for each \$2 of earnings above \$8,400
	1989	...	...	^e 8,880	^e 740.00	\$1 for each \$2 of earnings above \$8,880
1983	1990	...	...	...	...	\$1 for each \$3 of earnings above exempt amount
	1990	...	...	^e 9,360	^e 780.00	\$1 for each \$3 of earnings above \$9,360
	1991	...	...	^e 9,720	^e 810.00	\$1 for each \$3 of earnings above \$9,720
	1992	...	...	^e 10,200	^e 850.00	\$1 for each \$3 of earnings above \$10,200
	1993	...	...	^e 10,560	^e 880.00	\$1 for each \$3 of earnings above \$10,560
	1994	...	...	^e 11,160	^e 930.00	\$1 for each \$3 of earnings above \$11,160
	1995	...	...	^e 11,280	^e 940.00	\$1 for each \$3 of earnings above \$11,280
1996	1996	...	...	12,500	^h 1,041.67	\$1 for each \$3 of earnings above \$12,500
	1997	...	...	13,500	1,125.00	\$1 for each \$3 of earnings above \$13,500
	1998	...	...	14,500	ⁱ 1,208.33	\$1 for each \$3 of earnings above \$14,500
	1999	...	...	15,500	^j 1,291.67	\$1 for each \$3 of earnings above \$15,500

(Continued)

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

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

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^a
				Annual earnings (dollars)	Monthly wages ^b (dollars)	
For beneficiaries who have reached full retirement age ^f (cont.)						
2000	2000	...	EARNINGS TEST ELIMINATED ^k	...	...	...
For beneficiaries who will not reach full retirement age during year ^f						
2000	2000	...	...	^e 10,080	^e 840	\$1 for each \$2 of earnings above \$10,080
	2001	...	...	^e 10,680	^e 890	\$1 for each \$2 of earnings above \$10,680
	2002	...	...	^e 11,280	^e 940	\$1 for each \$2 of earnings above \$11,280
	2003	...	...	^e 11,520	960	\$1 for each \$2 of earnings above \$11,520
For beneficiaries who will reach full retirement age during year ^f						
2000	2000	...	...	17,000	^l 1,416.67	\$1 for each \$3 of earnings above \$17,000
	2001	...	...	25,000	^m 2,083.33	\$1 for each \$3 of earnings above \$25,000
	2002	...	...	30,000	2,500.00	\$1 for each \$3 of earnings above \$30,000
	2003	...	...	30,720	2,560.00	\$1 for each \$3 of earnings above \$30,720

- a. Earnings of retired-worker beneficiary affect total monthly family benefit. Earnings of dependent or survivor beneficiary affect only his or her benefit. However, effective January 1985, earnings of retired-worker beneficiary do not affect benefit to divorced spouse who has been divorced at least 2 years. Effective for benefits after December 1990, the 2-year requirement is waived, if the worker was entitled to benefits before the divorce.
- b. Monthly test for self-employment income is defined in terms of substantial services. For taxable years beginning after December 31, 1977, monthly test eliminated for both wage and self-employment income except that each individual may use monthly test for 1 grace year, usually the year of retirement.
- c. Applied to self-employment income only.
- d. Special provisions for earnings in noncovered employment outside the United States.
- e. Became effective due to automatic adjustment provisions mandated by 1972 and 1973 legislation.
- f. Full retirement age is 65 for beneficiaries who attain age 62 (age 60 for widow(er)s) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later.
- g. Discretionary increase included in 1977 legislation.
- h. Actual amount is \$1,041.66 2/3.
- i. Actual amount is \$1,208.33 1/3.
- j. Actual amount is \$1,291.66 2/3.
- k. Public Law 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.
- l. Actual amount is \$1,416.66 2/3.
- m. Actual amount is \$2,083.33 1/3.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

NOTE: ... = not applicable.

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

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

Table 2.A30—Monthly earnings guidelines for substantial gainful activity, 1961–2003 (in dollars)

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

a. Earnings above the maximum amount ordinarily demonstrate SGA; earnings below the minimum amount show that SGA has not occurred. When earnings are between the minimum and maximum, other factors are considered.

b. The 1977 amendments provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines than nonblind beneficiaries.

c. Pre-1978 guidelines are the same as those applicable to nonblind beneficiaries.

d. Annual amounts were determined by automatic adjustments linked to increases in average wage level. The amounts equal the monthly exempt amounts under the earnings test applicable to beneficiaries who have reached full retirement age (see Table 2.A29 for the 1983–1995 amounts).

e. Computed as follows: Nonblind SGA amount for 2000, multiplied by the ratio of the 2001 national average wage index to the 1998 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2002 level, the 2002 level would have been used.)

f. Computed as follows: Blind SGA amount for 1994, multiplied by the ratio of the 2001 national average wage index to the 1992 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2002 level, the 2002 level would have been used.)

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2003," *Federal Register*, vol. 67, no. 207 (October 25, 2002).

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

SGA guidelines for self-employed individuals differ from the guidelines for wage earners.

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

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

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

Table 2.A31—Taxation of Social Security benefits

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

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

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

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

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

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

Modified adjusted gross income ^a	Amount of benefits ^b	One-half of benefits ^b	Income to be compared with base amount	Relevant base amount ^c	Income in excess of base amount	One-half of excess	85 percent of excess income	Lower of one-half of benefits, or one-half of income between upper and lower base amounts	85 percent of benefits	Taxable benefits included in gross income	
										If income does not exceed upper base amount—lesser of one-half of benefits or one-half of income over base amount (K = lesser of C or G)	If income exceeds upper base amount—lesser of 85 percent of benefits or one-half of income between base amounts plus 85 percent of income over upper base amount (L = lesser of J or I + H)
(A)	(B)	(C)	(D = A + C)	(E)	(F = D - E)	(G = F / 2)	(H = .85 F)	(I)	(J = .85 B)	(K)	(L)
Married filing jointly											
25,000	10,000	5,000	30,000	32,000	0	...	...	...	...	...	...
28,000	10,000	5,000	33,000	32,000	1,000	500	...	...	...	500	...
33,000	10,000	5,000	38,000	32,000	6,000	3,000	...	...	...	3,000	...
38,000	10,000	5,000	43,000	32,000	11,000	5,500	...	...	...	5,000	...
40,000	10,000	5,000	45,000	44,000	1,000	...	850	5,000	8,500	...	5,850
43,000	10,000	5,000	48,000	44,000	4,000	...	3,400	5,000	8,500	...	8,400
45,000	10,000	5,000	50,000	44,000	6,000	...	5,100	5,000	8,500	...	8,500
Married filing separate returns ^d											
0	6,000	3,000	3,000	0	3,000	...	2,550	0	5,100	...	2,550
2,000	6,000	3,000	5,000	0	5,000	...	4,250	0	5,100	...	4,250
4,000	6,000	3,000	7,000	0	7,000	...	5,950	0	5,100	...	5,100
10,000	6,000	3,000	13,000	0	13,000	...	11,050	0	5,100	...	5,100
20,000	6,000	3,000	23,000	0	23,000	...	19,550	0	5,100	...	5,100
Individuals in all other filing categories											
20,000	8,000	4,000	24,000	25,000	0	...	...	...	...	...	...
25,000	8,000	4,000	29,000	25,000	4,000	2,000	...	...	...	2,000	...
30,000	8,000	4,000	34,000	25,000	9,000	4,500	...	...	...	4,000	...
32,000	8,000	4,000	36,000	34,000	2,000	...	1,700	4,000	6,800	...	5,700
35,000	8,000	4,000	39,000	34,000	5,000	...	4,250	4,000	6,800	...	6,800
40,000	8,000	4,000	44,000	34,000	10,000	...	8,500	4,000	6,800	...	6,800

- a. Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.
- b. Social Security and Tier 1 Railroad Retirement benefits, including workers' compensation benefits to the extent they cause a reduction in either of these two types of benefits.
- c. For married couples filing joint returns, up to 50 percent of benefits are subject to income tax if gross income is over \$32,000 but less than \$44,000. If gross income is less than \$32,000, none of the Social Security benefits will be taxable. If gross income exceeds \$44,000, up to 85 percent of Social Security benefits will be taxable income. Similar lower and upper level thresholds or "base amounts" for single individuals are \$25,000 and \$34,000. There is no similar threshold or base amount for married individuals who live together but file separate returns (for example, up to 85 percent of Social Security benefits in those cases may be considered taxable income).
- d. Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

NOTE: ... = not applicable.

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

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2003

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

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

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

c. Superseded by 1973 provision.

d. Mechanism established for providing cost-of-living adjustments.

e. General benefit increase.

f. Benefits originally paid in 2000 and through July 2001 were based on federal benefit rates of \$512.00 and \$530.00, respectively. Pursuant to P.L. 106-554, monthly payments beginning in August 2001 were effectively based on the higher \$531 amount. Lump-sum compensation payments were made based on an adjusted benefit rate for months prior to August 2001.

g. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2002; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, Office of the Chief Actuary, "SSI Federal Payment Amounts," <http://www.socialsecurity.gov/OACT/COLA/SSIAMts.html>.

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

CONTACT: Alfreda Brooks (410) 965-9849.

2.C Medicare: History of Provisions

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2004

Effective date ^a	Hospital Insurance					Supplementary Medical Insurance					
	All expenses in "benefit period" covered except—					Monthly premium ^b (dollars)	Annual deductible (dollars)	Coinsurance (percent)	Monthly premium (dollars)		
	Inpatient hospital deductible (IHD) covers first 60 days (dollars)	Inpatient hospital daily coinsurance		Skilled nursing facility daily coinsurance after 20 days (1/8 X IHD) (dollars)	Government amounts for—				For enrollee ^c (aged and disabled)	Aged	Disabled ^c
		Days 61 through 90 (1/4 X IHD) (dollars)	Lifetime reserve days after 90 days (1/2 X IHD)								
1966	40	10	d	d	...	50	20	3.00	3.00	...	
1967	40	10	d	5.00	...	50	20	3.00	3.00	...	
1968	40	10	20	5.00	...	e 50	e 20	f 4.00	f 4.00	...	
1969	44	11	22	5.50	...	50	20	4.00	4.00	...	
1970	52	13	26	6.50	...	50	20	5.30	5.30	...	
1971	60	15	30	7.50	...	50	20	5.60	5.60	...	
1972	68	17	34	8.50	...	50	g 20	5.80	5.80	...	
1973	72	18	36	9.00	33	60	20	h 6.30	6.30	22.70	
1974	84	21	42	10.50	36	60	20	6.70	6.70	29.30	
1975	92	23	46	11.50	40	60	20	6.70	8.30	30.30	
1976	104	26	52	13.00	45	60	20	7.20	14.20	30.80	
1977	124	31	62	15.50	54	60	20	7.70	16.90	42.30	
1978	144	36	72	18.00	63	60	20	8.20	18.60	41.80	
1979	160	40	80	20.00	69	60	20	8.70	18.10	41.30	
1980	180	45	90	22.50	78	60	20	9.60	23.00	41.40	
1981	204	51	102	25.50	89	ij 60	j 20	11.00	34.20	62.20	
1982	260	65	130	32.50	113	k 75	k 20	12.20	37.00	72.00	
1983	304	76	152	38.00	113	75	20	12.20	41.80	80.00	
1984	356	89	178	44.50	155	75	20	14.60	43.80	94.00	
1985	400	100	200	50.00	174	75	20	15.50	46.50	89.90	
1986	492	123	246	61.50	214	75	20	15.50	46.50	66.10	
1987	520	130	260	65.00	226	75	20	17.90	53.70	88.10	
1988	540	135	270	67.50	234	75	20	24.80	74.40	72.40	
1989	l 560	l	l	m 25.50	156	75	20	n 31.90	83.70	40.70	
1990	592	148	296	74.00	175	75	20	28.60	85.80	59.60	
1991	628	157	314	78.50	177	100	20	29.90	95.30	82.10	
1992	652	163	326	81.50	192	100	20	31.80	89.80	129.80	
1993	676	169	338	84.50	221	100	20	36.60	104.40	129.20	
1994	696	174	348	87.00	o 245	100	20	41.10	82.50	111.10	
1995	716	179	358	89.50	o 261	100	20	46.10	100.10	165.50	
1996	736	184	368	92.00	o 289	100	20	42.50	127.30	167.70	
1997	760	190	380	95.00	o 311	100	20	43.80	131.40	177.00	
1998	764	191	382	95.50	o 309	100	20	43.80	132.00	150.40	
1999	768	192	384	96.00	o 309	100	20	45.50	139.10	160.50	
2000	776	194	388	97.00	o 301	100	20	45.50	138.30	196.70	
2001	792	198	396	99.00	o 300	100	20	50.00	152.00	214.40	
2002	812	203	406	101.50	o 319	100	20	54.00	164.60	192.20	
2003	840	210	420	105.00	o 316	100	20	58.70	178.70	223.30	
2004	876	219	438	109.50	o 343	100	20	66.60	199.80	284.40	

- a. The HI and SMI deductible and coinsurance amounts begin in January unless otherwise noted. The HI and SMI monthly premium amounts were effective in July through 1983 and in January for 1984 and succeeding years.
- b. Premium paid for voluntary participation of individuals aged 65 or older not otherwise entitled to Hospital Insurance and of certain disabled individuals who have exhausted other entitlement.
- c. Beginning in July 1973 for the disabled.
- d. Benefit not provided.
- e. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- f. Beginning in April 1968.
- g. Home health services not subject to coinsurance, beginning in January 1973.
- h. Monthly premium for July and August 1973 was reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.
- i. Home health services not subject to deductible.
- j. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968, but only when physician accepts assignment.
- k. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.
- l. Unlike all other years, the 1989 deductible was applied on an annual, rather than a benefit period, basis. Once the deductible was paid by the beneficiary, Medicare paid the balance of expenses for covered hospital services, regardless of the number of days of hospitalization (except for psychiatric hospital care, which was still limited by the 190-day lifetime maximum).
- m. The coinsurance amount in 1989 was equal to 20 percent of the estimated national average daily cost of covered skilled nursing facility care, rather than 1/8 of the inpatient hospital deductible. The beneficiary paid the coinsurance amount for the first 8 days of care in 1989, rather than for days of care 21 to 100 in a benefit period as in all other years. Skilled nursing facility benefits were available for up to 150 days of care per year in 1989, rather than for up to 100 days of care per benefit period as in all other years.
- n. Includes the standard monthly SMI premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Amount shown is for most Part B enrollees. Residents of Puerto Rico and other territories and commonwealths, as well as persons enrolled in Part B only, paid different supplemental flat premiums resulting in a smaller premium than that shown.
- o. A reduced premium is available to individuals aged 65 or older who are not otherwise entitled to HI but who have (or who were married to, widowed, or divorced from a spouse for certain periods of time who has or had) at least 30 quarters of Social Security coverage. The reduced premium is \$184, \$183, \$188, \$187, \$170, \$170, \$166, \$165, \$175, \$174, and \$189 for 1994 to 2004, respectively.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable.

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

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2002–2004

State or area	Federal medical assistance percentage ^a			Enhanced federal medical assistance percentage ^b	
	2002 ^c	2003 ^d	2004 ^e	2003	2004
Alabama	70.45	70.60	70.75	79.42	79.53
Alaska	53.01	58.27	58.39	70.79	70.87
Arizona	64.98	67.25	67.62	77.08	77.08
Arkansas	72.64	74.28	74.67	82.00	82.27
California	51.40	50.00	50.00	65.00	65.00
Colorado	50.00	50.00	50.00	65.00	65.00
Connecticut	50.00	50.00	50.00	65.00	65.00
Delaware	50.00	50.00	50.00	65.00	65.00
District of Columbia	70.00	70.00	70.00	79.00	79.00
Florida	56.43	58.83	58.93	71.18	71.25
Georgia	59.00	59.60	59.58	71.72	71.71
Hawaii	56.34	58.77	58.90	71.14	71.23
Idaho	71.02	70.96	70.46	79.67	79.32
Illinois	50.00	50.00	50.00	65.00	65.00
Indiana	62.04	61.97	62.32	73.38	73.62
Iowa	62.86	63.50	63.93	74.45	74.75
Kansas	60.20	60.15	60.82	72.11	72.57
Kentucky	69.94	69.89	70.09	78.92	79.06
Louisiana	70.30	71.28	71.63	79.90	80.14
Maine	66.58	66.22	66.01	76.35	76.21
Maryland	50.00	50.00	50.00	65.00	65.00
Massachusetts	50.00	50.00	50.00	65.00	65.00
Michigan	56.36	55.42	55.89	68.79	69.12
Minnesota	50.00	50.00	50.00	65.00	65.00
Mississippi	76.09	76.62	77.08	83.63	83.96
Missouri	61.06	61.23	61.47	72.86	73.03
Montana	72.83	72.96	72.85	81.07	81.00
Nebraska	59.55	59.52	59.89	71.66	71.92
Nevada	50.00	52.39	54.93	66.67	68.45
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	73.04	74.56	74.85	82.19	82.40
New York	50.00	50.00	50.00	65.00	65.00
North Carolina	61.46	62.56	62.85	73.79	74.00
North Dakota	69.87	68.36	68.31	77.85	77.82
Ohio	58.78	58.83	59.23	71.18	71.46
Oklahoma	70.43	70.56	70.24	79.39	79.17
Oregon	59.20	60.16	60.81	72.11	72.57
Pennsylvania	54.65	54.69	54.76	68.28	68.33
Rhode Island	52.45	55.40	56.03	68.78	69.22
South Carolina	69.34	69.81	69.86	78.87	78.90
South Dakota	65.93	65.29	65.67	75.70	75.97
Tennessee	63.64	64.59	64.40	75.21	75.08
Texas	60.17	59.99	60.22	71.99	72.15
Utah	70.00	71.24	71.72	79.87	80.20
Vermont	63.06	62.41	61.34	73.69	72.94
Virginia	51.45	50.53	50.00	65.37	65.00
Washington	50.37	50.00	50.00	65.00	65.00
West Virginia	75.27	75.04	75.19	82.53	82.63
Wisconsin	58.57	58.43	58.41	70.90	70.89
Wyoming	61.97	61.32	59.77	72.92	71.84
Outlying areas					
American Samoa	^f 50.00	^f 50.00	^f 50.00	^f 65.00	^f 65.00
Guam	^f 50.00	^f 50.00	^f 50.00	^f 65.00	^f 65.00
Northern Mariana Islands	^f 50.00	^f 50.00	^f 50.00	^f 65.00	^f 65.00
Puerto Rico	^f 50.00	^f 50.00	^f 50.00	^f 65.00	^f 65.00
Virgin Islands	^f 50.00	^f 50.00	^f 50.00	^f 65.00	^f 65.00

a. Section 1905 (b) of the Social Security Act specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived: $N = 3\text{-year average national per capita personal income}$; $S = 3\text{-year average state per capita personal income}$. Federal medical assistance percentage: $\text{State share} = (S^2/N^2) \times 45$ or $(45/N^2) \times S^2$; $\text{Federal share} = 100 - \text{state share}$ with 50–83 percent limits.

b. This is the Title XXI enhanced federal medical assistance percentage rate specified in section 2105(b) of the Act. The enhanced federal medical assistance percentage is limited to no more than 85%.

c. Effective October 1, 2001, through September 30, 2002.

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

e. Effective October 1, 2003, through September 30, 2004.

f. 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%.

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

CONTACT: Adelle Simmons (202) 401-6119.

2.F SSA Administrative Data: Offices and Staff

Table 2.F1—Number of SSA offices, 2002

Office	Number
Headquarters (Baltimore, Maryland)	1
Regional offices ^a	10
Field offices ^b	1,336
Level 1	612
Level 2	674
Resident stations	50
Teleservice centers	36
Program service centers ^c	6
Data operations center ^d	1
Office of Hearings and Appeals	
Headquarters (Falls Church, Virginia)	1
Regional offices	10
Hearing offices	138
Satellite offices	4

- a. Regional offices are located in Boston, Massachusetts; New York, New York; Philadelphia, Pennsylvania; Atlanta, Georgia; Chicago, Illinois; Dallas, Texas; Kansas City, Missouri; Denver, Colorado; San Francisco, California; and Seattle, Washington.
- b. In December 1997, the field offices were redesignated as Level 1, 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.
- c. Program service centers are located in Jamaica, New York; Philadelphia, Pennsylvania; Birmingham, Alabama; Chicago, Illinois; Kansas City, Missouri; and Richmond, California.
- d. The data operations center is located in Wilkes-Barre, Pennsylvania.

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

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

Table 2.F2—Number of SSA employees and percentage with selected characteristics by grade, September 30, 2002

Characteristic	All grade levels	GS 1–4	GS 5–8	GS 9–12	GS 13–15	SES
	<i>Number</i>					
Total ^a	63,661	1,072	20,383	32,623	7,995	124
	<i>Percentage of total</i>					
Women	70.8	76.9	80.9	72.2	49.2	33.9
Minorities	42.7	50.1	56.4	39.1	25.3	33.1
Black	27.2	43.4	35.1	24.7	17.1	23.4
Hispanic	11.2	4.7	15.7	10.4	5.0	8.9
Asian or Pacific Islander	3.1	1.5	4.3	2.7	2.0	0.8
American Indian or Alaska Native	1.2	0.6	1.3	1.2	1.1	0.0
Severely disabled	2.3	10.2	4.0	1.4	0.8	0.8

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

SOURCE: Social Security Administration's Affirmative Employment Plan.

CONTACT: Nelson Izquierdo (410) 965-4364.

Table 2.F3—Number of work years, fiscal years 1993–2002

Year	Full-time permanent staff ^a	Total work years ^b
1993	61,640	66,623
1994	62,434	66,741
1995 ^c	62,504	67,063
1996	62,133	66,726
1997	61,224	69,378
1998	59,943	67,210
1999	59,752	66,459
2000	60,434	65,521
2001	61,490	65,562
2002	61,914	65,742

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

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

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

SOURCE: Social Security Administration's Payroll Reports.

CONTACT: Donna Frocke (410) 965-3094.

Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2002 (in thousands)

Workload	Total	Worker	Family members and survivors
Beginning-of-year pending	122.4	48.1	74.3
Received	3,213.7	1,736.9	1,476.8
Processed ^a	3,266.3	1,755.9	1,510.4
End-of-year pending	69.8	29.1	40.7

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

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

NOTE: Before fiscal year 2001, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

Table 2.F5—Number of Disability Insurance claims, fiscal year 2002 (in thousands)

Workload	Total	Worker	Family members and survivors
Beginning-of-year pending	482.3	458.0	24.3
Received	1,986.6	1,745.4	241.2
Processed ^a	1,985.6	1,738.9	246.7
End-of-year pending	483.3	464.5	18.8

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

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

NOTE: Before fiscal year 2001, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2002 (in thousands)

Workload	Total	Aged	Blind or disabled
Beginning-of-year pending	425.0	4.1	420.9
Received	2,010.6	169.0	1,841.6
Processed ^a	1,979.8	167.9	1,811.9
End-of-year pending	455.8	5.2	450.6

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

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

NOTE: Before fiscal year 2001, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

2.F SSA Administrative Data: Service Delivery

Table 2.F7—Accuracy rates and use of 800 telephone number, fiscal years 1998–2002

Item	1998	1999	2000	2001	2002
<i>Accuracy rates (percent)</i>					
OASI payments					
Index of dollar accuracy	99.8	99.6	99.6	99.9	a
Payment review/stewardship results					
Excess payments	99.9	99.8	99.9	99.9	a
Underpayments	99.9	99.9	99.9	99.8	a
SSI payments ^b					
Index of dollar accuracy ^c	93.9	94.2	94.0	91.4	a
Payment review/stewardship results ^d					
Excess payments	93.5	94.3	94.7	93.3	a
Underpayments	98.8	98.3	98.6	98.8	a
Disability Insurance benefits ^e					
Initial claims	93.7	94.3	94.2	93.9	94.2
Allowances	96.1	96.5	97.0	96.8	97.1
Denials	92.3	93.0	92.4	92.0	92.4
Reconsideration	91.6	92.3	92.2	91.0	90.5
Reversals of denials	95.6	96.0	96.9	96.8	95.9
Affirmations of denials	90.9	91.6	91.3	89.9	89.4
<i>National 800 number network (1-800-772-1213)</i>					
Number of calls received (millions)	78.9	78.7	76.3	74.8	62.3
Average time calls answered (minutes)	2.7	2.0	2.5	2.8	4.7

a. Data not available.

b. Excludes determinations of disability.

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

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

e. Represents cases free of decisional and documentation errors.

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

CONTACT: Bob Marks (410) 965-4527 or Phyllis Zemlak (410) 965-3073.

Table 2.F8—Workload of SSA's Administrative Law Judges (ALJs), fiscal years 2001–2003

Item	2001	2002	2003 ^a
Number of ALJs	919	969	991
Average monthly hearing dispositions per ALJ	42	45	51
Average hearings pending per ALJ	447	470	574

a. Estimated data.

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

NOTE: Data based on Administrative Law Judges' availability during fiscal year 2002; data excludes Regional Chief ALJs.

CONTACT: Beverly Nateghi (703) 605-8788.

Table 2.F9—Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2002–2003

Program	Hearing receipts		Hearing dispositions		End-of-year pending cases	
	2002	2003 ^a	2002	2003 ^a	2002	2003 ^a
Total	596,959	688,147	532,106	602,009	500,757	586,895
OASI	2,944	3,227	2,725	3,081	2,970	3,116
Disability						
DI	200,302	214,042	171,367	184,538	165,228	194,732
SSI	158,775	181,611	142,120	162,572	147,315	166,354
DI and SSI	163,360	167,110	138,502	146,816	147,538	167,832
Medicare (Parts A and B and adversarial)	71,576	122,147	77,388	105,000	37,705	54,852
Black Lung	2	10	4	2	1	9

a. Estimated data.

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

CONTACT: Beverly Nateghi (703) 605-8788.

Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2001–2003

Cases	2001	2002	2003 ^a
Beginning-of-year pending	127,190	92,185	59,781
Receipts	78,833	83,063	99,045
Dispositions	110,668	115,467	99,045
End-of-year pending	95,355	59,781	59,781

a. Estimated data.

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

CONTACT: Beverly Nateghi (703) 605-8788.

Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act of 1938 and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2002

Effective date	Minimum hourly wage for workers in jobs first covered by—				Production workers in manufacturing ^a	
	1938 act ^b (dollars)	1961 amendments ^c (dollars)	1966 and subsequent amendments ^d		Average gross hourly earnings (dollars)	Average weekly hours
			Nonfarm (dollars)	Farm (dollars)		
October 24						
1938	0.25	...	...	...	0.62	35.6
1939	0.30	...	...	...	0.63	37.7
1945	0.40	...	...	...	1.02	43.5
January 25, 1950	0.75	...	...	...	1.44	40.5
March 1, 1956	1.00	...	...	...	1.95	40.4
September 3						
1961	1.15	1.00	...	...	2.32	39.8
1963	1.25	1.00	...	...	2.46	40.5
1964	1.25	1.15	...	...	2.53	40.7
1965	1.25	1.25	...	...	2.61	41.2
February 1						
1967	1.40	1.40	1.00	1.00	2.83	40.6
1968	1.60	1.60	1.15	1.15	3.01	40.7
1969	1.60	1.60	1.30	1.30	3.19	40.6
1970	1.60	1.60	1.45	1.30	3.36	39.8
1971	1.60	1.60	1.60	1.30	3.57	39.9
May 1, 1974	2.00	2.00	1.90	1.60	4.42	40.0
January 1						
1975	2.10	2.10	2.00	1.80	4.83	39.5
1976	2.30	2.30	2.20	2.00	5.22	40.1
1977	2.30	2.30	2.30	2.20	5.68	40.3
1978	2.65	2.65	2.65	2.65	6.17	40.4
1979	2.90	2.90	2.90	2.90	6.70	40.2
1980	3.10	3.10	3.10	3.10	7.27	39.7
1981	3.35	3.35	3.35	3.35	7.99	39.8
1982	3.35	3.35	3.35	3.35	8.49	38.9
1983	3.35	3.35	3.35	3.35	8.83	40.1
1984	3.35	3.35	3.35	3.35	9.19	40.7
1985	3.35	3.35	3.35	3.35	9.54	40.5
1986	3.35	3.35	3.35	3.35	9.73	40.7
1987	3.35	3.35	3.35	3.35	9.91	41.0
1988	3.35	3.35	3.35	3.35	10.19	41.1
1989	3.35	3.35	3.35	3.35	10.48	41.0
April 1						
1990 ^e	3.80	3.80	3.80	3.80	10.83	40.8
1991 ^e	4.25	4.25	4.25	4.25	11.18	40.7
1992 ^e	4.25	4.25	4.25	4.25	11.46	41.0
1993 ^e	4.25	4.25	4.25	4.25	11.74	41.4
1994	4.25	4.25	4.25	4.25	12.07	42.0
1995	4.25	4.25	4.25	4.25	12.37	41.6
October 1, 1996 ^e	4.75	4.75	4.75	4.75	12.77	41.6
September 1, 1997 ^e	5.15	5.15	5.15	5.15	13.17	42.0
January 1						
1998 ^e	5.15	5.15	5.15	5.15	13.49	41.7
1999 ^e	5.15	5.15	5.15	5.15	13.91	41.7
2000 ^e	5.15	5.15	5.15	5.15	14.38	41.6
2001 ^e	5.15	5.15	5.15	5.15	14.83	40.7
2002 ^e	5.15	5.15	5.15	5.15	15.30	40.9

a. For year in which minimum wage rate changes were effective.

b. The 1938 act was applicable generally to employees engaged in interstate commerce or in the production of goods for interstate commerce.

c. The 1961 amendments extended coverage primarily to employees in large retail and service trades as well as local transit, construction, and gasoline service station employees.

d. The 1966 amendments extended coverage to state and local government employees of hospitals, nursing homes, and schools, and to employees of laundries, dry cleaners, large hotels and motels, restaurants, and farms. Subsequent amendments extended coverage to the remaining federal, state, and local employees not protected in 1966, to certain workers in retail and service trades previously exempted, and to certain domestic workers in private household employment.

e. A training wage may be paid for a period of 90 days to an employee who has not attained age 20. The training wage was \$3.35 per hour effective April 1, 1990, and \$3.61 per hour effective April 1, 1991, through March 31, 1993. Effective October 1, 1996, the training wage is \$4.25 per hour.

SOURCE: Department of Labor, Bureau of Labor Statistics.

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153.

3.C Interprogram Data

Table 3.C3—Contributions to the Social Security and Medicare trust funds, by program and source, selected years 1965–2002 (in millions of dollars)

Program and source	1965	1970	1975	1980	1985	1990	1995	1998	1999	2000	2001	2002
Social Security trust funds												
Old-Age and Survivors Insurance ^a	16,017	30,257	56,815	103,456	178,010	270,507	309,906	380,113	407,023	432,977	453,354	468,108
Employer	7,618	14,489	27,184	49,731	83,682	125,272	143,978	176,564	188,461	200,431	210,659	215,897
Employee	7,440	14,204	26,947	49,436	83,400	124,481	143,335	174,786	187,160	198,736	207,999	215,039
Self-employed	959	1,564	2,684	4,289	7,720	15,906	17,103	19,614	20,503	22,216	22,793	24,262
Taxation of benefits	...	...	...	...	3,208	4,848	5,490	9,149	10,899	11,594	11,903	12,909
Disability Insurance ^a	1,188	4,481	7,444	13,255	17,204	28,498	54,695	59,485	63,827	71,813	75,743	78,202
Employer	564	2,154	3,562	6,307	8,119	13,414	25,665	28,064	29,936	33,971	35,759	36,655
Employee	551	2,117	3,530	6,254	8,087	13,338	25,545	27,772	29,730	33,701	35,312	36,503
Self-employed	73	210	352	694	776	1,602	3,144	3,091	3,500	3,420	3,861	4,114
Taxation of benefits	...	...	...	...	222	144	341	558	661	721	811	930
Medicare trust funds												
Hospital Insurance ^a	...	4,880	11,510	23,866	47,173	71,753	103,301	130,700	140,306	154,520	160,896	162,650
Employer	...	2,379	5,578	11,591	22,613	33,850	45,839	57,849	61,826	67,526	71,181	71,334
Employee	...	2,332	5,530	11,518	22,549	33,635	45,852	57,849	61,826	67,526	71,181	71,334
Self-employed	...	169	395	739	1,970	4,146	6,743	8,619	8,655	9,299	9,631	10,040
Voluntarily insured ^b	...	...	7	18	41	122	954	1,316	1,447	1,382	1,370	1,626
Taxation of benefits	...	...	...	...	...	...	3,913	5,067	6,552	8,787	7,533	8,316
Supplementary Medical Insurance ^{a,c}	...	1,096	1,917	3,011	5,613	11,319	19,717	20,932	18,966	20,556	22,764	25,066
Aged	...	1,096	1,759	2,707	5,105	10,311	17,651	18,594	16,604	17,892	19,905	21,610
Disabled	...	...	158	304	508	1,008	2,066	2,338	2,362	2,664	2,859	3,456

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

b. Beginning in July 1973, aged ineligible may voluntarily enroll for HI.

c. Includes premiums paid on behalf of eligibles by state governments under "buy-in" arrangements.

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 3.C4—Average monthly amount of Social Security and selected public assistance programs, December 1950–2002 (in current and 2002 dollars)

Year	Average monthly Social Security benefit in current-payment status				Average monthly amount per recipient under—				Consumer price index ^a
	Retired workers		Widowed mother or father and 2 children		Supplemental Security Income ^b		Temporary Assistance for Needy Families ^c		
	Current dollars	2002 dollars	Current dollars	2002 dollars	Current dollars	2002 dollars	Current dollars	2002 dollars	
1950	43.86	317.37	93.90	679.46	43.05	311.51	20.85	150.87	25.0
1951	42.14	287.67	93.80	640.32	44.55	304.12	22.00	150.18	26.5
1952	49.25	333.68	106.00	718.18	48.80	330.63	23.45	158.88	26.6
1953	51.10	343.64	111.90	752.52	48.90	328.85	23.20	156.02	26.9
1954	59.14	400.69	130.50	884.17	48.70	329.96	23.25	157.53	26.7
1955	61.90	417.83	135.40	913.95	50.05	337.84	23.50	158.63	26.8
1956	63.09	413.51	141.00	924.16	53.25	349.02	24.80	162.55	27.6
1957	64.58	411.36	146.30	931.89	55.50	353.52	25.40	161.79	28.4
1958	66.35	415.32	151.70	949.57	56.95	356.48	26.65	166.82	28.9
1959	72.78	447.82	170.70	1050.33	56.70	348.88	27.30	167.98	29.4
1960	74.04	449.46	188.00	1,141.25	58.90	357.55	28.35	172.10	29.8
1961	75.65	456.17	189.30	1,141.48	57.60	347.33	29.45	177.58	30.0
1962	76.19	453.38	190.70	1,134.79	61.55	366.26	29.30	174.35	30.4
1963	76.88	450.08	192.50	1,126.97	62.80	367.65	29.70	173.87	30.9
1964	77.57	449.76	193.40	1,121.35	63.65	369.05	31.50	182.64	31.2
1965	83.92	477.39	219.80	1,250.37	63.10	358.96	32.85	186.87	31.8
1966	84.35	463.80	221.90	1,220.11	68.05	374.17	36.25	199.32	32.9
1967	85.37	455.56	224.40	1,197.46	70.15	374.34	39.50	210.78	33.9
1968	98.86	503.77	257.10	1,310.12	69.55	354.41	44.75	228.04	35.5
1969	100.40	481.76	255.80	1,227.43	73.90	354.60	45.15	216.65	37.7
1970	118.10	536.79	291.10	1,323.12	77.65	352.94	50.30	228.62	39.8
1971	132.17	581.74	320.00	1,408.47	77.50	341.11	52.30	230.20	41.1
1972	162.35	691.04	383.10	1,630.65	79.95	340.30	54.10	230.28	42.5
1973	166.42	651.63	391.00	1,530.99	76.15	298.17	56.95	222.99	46.2
1974	188.21	656.02	438.40	1,528.06	91.06	317.39	63.37	220.88	51.9
1975	207.18	675.29	468.60	1,527.38	90.93	296.38	69.69	227.15	55.5
1976	224.86	698.92	503.40	1,564.69	94.37	293.33	75.20	233.74	58.2
1977	243.00	707.87	546.60	1,592.27	96.62	281.46	80.08	233.28	62.1
1978	263.20	703.29	591.90	1,581.61	100.43	268.36	83.60	223.39	67.7
1979	294.30	694.12	655.00	1,544.84	122.67	289.32	90.34	213.07	76.7
1980	341.40	715.63	759.20	1,591.42	128.20	268.73	97.10	203.54	86.3
1981	385.97	742.79	858.00	1,651.19	137.81	265.21	103.15	198.51	94.0
1982	419.30	777.17	885.50	1,641.26	145.69	270.03	106.33	197.08	97.6
1983	440.77	787.12	923.00	1,648.28	157.89	281.96	109.93	196.31	101.3
1984	460.57	791.24	948.30	1,629.13	157.88	271.23	114.72	197.08	105.3
1985	478.62	792.15	981.50	1,624.46	164.26	271.86	118.17	195.58	109.3
1986	488.44	799.63	994.00	1,627.28	173.66	284.30	122.09	199.87	110.5
1987	512.65	803.63	1,032.30	1,618.22	180.64	283.17	125.19	196.25	115.4
1988	536.77	805.82	1,070.40	1,606.93	188.23	282.58	130.30	195.61	120.5
1989	566.85	813.19	1,120.04	1,606.78	198.81	285.21	131.89	189.21	126.1
1990	602.56	814.67	1,177.70	1,592.27	212.66	287.52	135.96	183.82	133.8
1991	629.32	825.55	1,216.76	1,596.17	221.30	290.31	134.98	177.07	137.9
1992	652.64	832.01	1,252.40	1,596.61	227.39	289.89	132.92	169.45	141.9
1993	674.06	836.33	1,282.60	1,591.37	236.52	293.46	132.87	164.86	145.8
1994	697.34	842.68	1,328.40	1,605.26	242.54	293.09	133.71	161.58	149.7
1995	719.80	848.29	1,365.50	1,609.24	250.65	295.39	134.35	158.33	153.5
1996	744.96	849.71	1,450.60	1,654.56	260.75	297.41	133.53	152.31	158.6
1997	774.84	868.99	1,502.60	1,685.18	268.46	301.08	170.71	191.45	161.3
1998	779.69	860.56	1,537.70	1,697.19	277.45	306.23	^d 129.04	142.42	163.9
1999	804.30	864.51	1,590.40	1,709.47	289.19	310.84	^d 133.45	143.44	168.3
2000	844.48	877.97	1,675.40	1,741.84	299.69	311.57	^d 151.29	157.29	174.0
2001	874.44	895.22	1,755.10	1,796.82	^d 314.22	321.69	^d 157.50	161.24	176.7
2002	895.00	895.00	1,812.10	1,812.10	330.04	330.04	167.86	167.86	180.9

a. Data from Bureau of Labor Statistics, consumer price index for all urban consumers (CPI-U) for all items (1982–1984 = 100).

b. For 1940–1973, data refer to Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

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

d. Revised data.

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

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

3.C Interprogram Data

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2002, selected years

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI ^a		OASDI and SSI, number per 1,000	OASDI, SSI, or both, number per 1,000	OASDI beneficiaries	SSI recipients
	Number per 1,000	State rank	Number per 1,000	State rank				
1940	7	...	217	...	1	223	14.3	0.5
1945	62	...	194	...	5	251	8.1	2.6
1950	164	...	224	...	22	366	12.6	9.8
1955	394	...	179	...	34	539	8.6	19.2
1960	616	...	141	...	41	716	6.6	28.5
1965	752	...	117	...	52	817	7.0	44.7
1970	855	...	104	...	63	896	7.4	60.4
1975	904	...	111	...	78	939	8.6	69.5
1980	914	...	87	...	61	941	6.7	70.2
1985	917	...	71	...	51	937	5.5	71.1
1990	924	...	66	...	46	944	4.9	69.2
1995	913	...	63	...	39	937	4.3	62.6
2000	911	...	57	...	34	934	3.7	59.1
2001	908	...	56	...	33	931	3.6	58.4
2002								
United States	901	...	56	...	32	924	3.6	57.8
Alabama	929	26	69	7	55	943	5.9	79.8
Alaska	896	42	58	11	28	927	3.1	47.8
Arizona	843	50	32	30	19	856	2.2	59.2
Arkansas	918	33	58	12	48	928	5.3	82.9
California	844	49	132	1	64	912	7.5	48.3
Colorado	905	39	31	31	18	918	2.0	58.2
Connecticut	945	11	26	37	12	959	1.3	47.1
Delaware	944	13	23	41	15	952	1.6	66.2
District of Columbia	794	51	68	9	41	821	5.2	60.7
Florida	855	48	47	19	24	878	2.8	51.3
Georgia	913	35	68	10	49	932	5.4	72.9
Hawaii	883	46	50	17	21	912	2.4	42.2
Idaho	962	4	20	44	15	966	1.6	75.8
Illinois	917	34	38	24	16	939	1.8	42.3
Indiana	949	10	17	49	12	954	1.2	69.4
Iowa	958	7	17	48	12	962	1.3	72.1
Kansas	935	24	19	45	12	941	1.3	63.8
Kentucky	928	27	70	6	52	946	5.6	74.1
Louisiana	904	40	78	4	58	925	6.4	74.0
Maine	952	9	31	32	26	957	2.7	82.2
Maryland	876	47	40	23	19	897	2.2	48.4
Massachusetts	908	37	56	13	32	932	3.5	56.5
Michigan	954	8	30	34	17	966	1.8	58.8
Minnesota	942	16	26	38	13	955	1.4	50.7
Mississippi	924	28	102	2	82	944	8.9	80.2

(Continued)

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2002, selected years—Continued

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI ^a		OASDI and SSI, number per 1,000	OASDI, SSI, or both, number per 1,000	OASDI beneficiaries	SSI recipients
	Number per 1,000	State rank	Number per 1,000	State rank				
2002 (cont.)								
Missouri	936	19	29	35	21	944	2.2	71.9
Montana	935	23	20	43	16	939	1.7	77.8
Nebraska	945	12	17	47	12	950	1.3	70.0
Nevada	910	36	32	29	19	924	2.1	57.9
New Hampshire	968	1	12	51	8	972	0.8	67.8
New Jersey	921	31	45	22	20	945	2.2	45.5
New Mexico	883	45	69	8	47	904	5.3	68.9
New York	884	44	90	3	41	932	4.6	45.7
North Carolina	943	15	54	16	42	955	4.4	78.1
North Dakota	941	17	22	42	16	947	1.7	75.0
Ohio	935	21	24	39	14	945	1.5	60.0
Oklahoma	922	29	38	25	28	931	3.0	73.6
Oregon	965	3	28	36	16	976	1.6	57.5
Pennsylvania	935	22	34	28	21	948	2.2	61.8
Rhode Island	921	32	49	18	31	939	3.3	62.1
South Carolina	921	30	55	14	43	934	4.7	78.0
South Dakota	959	6	30	33	21	968	2.1	68.8
Tennessee	939	18	55	15	42	952	4.5	76.3
Texas	887	43	74	5	51	911	5.7	68.3
Utah	903	41	19	46	9	913	1.0	49.8
Vermont	944	14	36	26	29	950	3.1	82.0
Virginia	907	38	46	21	29	924	3.2	62.7
Washington	935	20	36	27	14	957	1.5	38.6
West Virginia	929	25	46	20	32	943	3.5	70.0
Wisconsin	966	2	23	40	15	974	1.6	65.8
Wyoming	961	5	16	50	12	964	1.3	80.2

a. For 1940–1973, data refer to Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

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

NOTE: . . . = not applicable.

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

3.C Interprogram Data

Table 3.C6—Number and percentage of Social Security (OASDI) beneficiaries also receiving federally administered Supplemental Security Income (SSI) payments, by type of OASDI benefit and SSI eligibility category, December 2002

Type of benefit	All OASDI beneficiaries ^a	Number receiving SSI			Percentage of all OASDI beneficiaries		
		Total	Aged	Blind and disabled	Total	Aged	Blind and disabled
Total	46,452,540	2,410,290	713,740	1,696,550	5.2	1.5	3.7
Retirement	32,362,130	1,049,820	568,810	481,010	3.2	1.8	1.5
Workers aged 65 or older	26,624,790	782,150	508,680	273,470	2.9	1.9	1.0
Men	13,774,890	303,460	190,580	112,880	2.2	1.4	0.8
Women	12,849,900	478,690	318,100	160,590	3.7	2.5	1.2
Workers aged 62–64	2,570,130	39,040	0	39,040	1.5	0	1.5
Men	1,332,960	24,300	0	24,300	1.8	0	1.8
Women	1,245,910	13,970	0	13,970	1.1	0	1.1
Wives and husbands	2,681,090	127,270	60,690	67,180	4.7	2.2	2.5
Aged 65 or older	2,349,200	115,270	60,690	55,180	4.9	2.6	2.3
Aged 62–64	285,440	10,790	0	10,790	3.8	0	3.8
Under age 62 with children	46,450	1,210	0	1,210	2.6	0	2.6
Disabled adult children	193,150	98,060	40	98,020	50.8	0	50.8
Aged 65 or older	1,060	430	40	390	40.6	3.8	36.8
Aged 18–64	192,090	97,630	0	97,630	50.8	0	50.8
Children under age 18 and students aged 18–19	284,230	4,070	0	4,070	1.4	0	1.4
Survivors	6,870,200	467,580	143,980	323,600	6.8	2.1	4.7
Nondisabled widow(er)s	4,563,660	245,830	140,930	104,900	5.4	3.1	2.3
Aged 65 or older	4,110,180	238,420	140,930	97,490	5.8	3.4	2.4
Aged 60–64	453,480	7,410	0	7,410	1.6	0	1.6
Disabled widow(er)s	205,870	37,540	0	37,540	18.2	0	18.2
Widowed mothers and fathers	193,270	5,220	50	5,170	2.7	0	2.7
Parents	2,350	130	120	10	5.5	5.1	0.4
Disabled adult children	494,750	157,920	2,880	155,040	31.9	0	31.3
Aged 65 or older	64,550	21,390	2,880	18,810	33.6	4.5	29.1
Aged 18–64	430,200	136,230	0	136,230	31.7	0	31.7
Children under age 18 and students aged 18–19	1,410,300	20,940	0	20,940	1.5	0	1.5
Disability	7,220,210	892,890	950	891,940	12.4	0	12.4
Workers under age 65	5,535,860	798,740	0	798,740	14.4	0	14.4
Men	3,069,140	354,730	0	354,730	11.6	0	11.6
Women	2,466,720	444,010	0	444,010	18.0	0	18.0
Wives and husbands	151,260	10,880	950	9,930	7.2	0.6	6.6
Aged 65 or older	22,200	3,110	950	2,160	14.0	4.3	9.7
Aged 62–64	29,600	1,890	0	1,890	6.4	0	6.4
Under age 62 with children	99,460	5,880	0	5,880	5.9	0	5.9
Disabled adult children aged 18–64	60,760	41,830	0	41,830	68.8	0	68.8
Children under age 18 and students aged 18–19	1,472,330	41,440	0	41,440	2.8	0	2.8

a. Excludes 10 special age-72 beneficiaries.

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

CONTACT: Paul Davies (410) 966-0299.

Table 3.C6.1—Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered Supplemental Security Income (SSI) payments based on disability, by type of benefit, December 1978–2002

Year	Unduplicated total ^a	OASDI beneficiaries				Blind or disabled SSI recipients		
		Total	Disabled workers	Disabled adult children under age 65	Disabled widow(er)s	Total	Receiving SSI only	Receiving both SSI and OASDI
1978	4,676,450	3,415,469	2,879,774	405,944	129,751	1,747,126	^b 1,260,981	486,145
1979	4,662,528	3,419,624	2,870,590	419,201	129,833	1,726,553	^b 1,242,904	483,649
1980	4,662,546	3,418,434	2,858,680	432,174	127,580	1,730,847	^b 1,244,112	486,735
1981	4,570,071	3,340,701	2,776,519	442,592	121,590	1,702,895	^b 1,229,370	473,525
1982	4,366,314	3,169,449	2,603,599	449,478	116,372	1,655,279	^b 1,196,865	458,414
1983	4,367,241	3,143,111	2,569,029	462,491	111,591	1,699,774	^b 1,224,130	475,644
1984	4,460,188	3,183,618	2,596,516	477,951	109,151	1,780,459	^b 1,276,570	503,889
1985	4,591,316	3,258,200	2,656,638	494,557	107,005	1,879,168	^b 1,333,116	546,052
1986	4,812,143	3,346,603	2,728,463	511,166	106,974	2,010,458	^b 1,465,540	544,918
1987	4,904,785	3,416,529	2,785,859	524,388	106,282	2,118,710	^b 1,488,256	630,454
1988	5,012,435	3,468,186	2,830,284	534,779	103,123	2,202,714	1,544,249	658,465
1989	5,155,787	3,540,480	2,895,364	543,486	101,630	2,301,926	^c 1,615,307	686,619
1990	5,395,261	3,667,721	3,011,294	555,438	100,989	2,449,897	1,727,540	722,357
1991	5,743,614	3,877,804	3,194,938	568,377	114,489	2,641,524	1,865,810	775,714
1992	6,249,217	4,185,714	3,467,783	586,607	131,324	2,909,997	2,063,503	846,494
1993	6,707,127	4,476,648	3,725,966	603,667	147,015	3,148,413	2,230,479	917,934
1994	7,103,399	4,741,348	3,962,954	617,718	160,676	3,335,255	2,362,051	973,204
1995	7,398,942	4,987,004	4,185,263	628,717	173,024	3,482,256	2,411,938	1,070,318
1996	7,691,134	5,205,071	4,385,623	637,537	181,911	3,568,393	2,486,063	1,082,330
1997	7,818,216	5,340,082	4,508,134	644,010	187,938	3,561,625	2,478,134	1,083,491
1998	8,090,686	5,543,886	4,698,319	651,386	194,181	3,646,020	2,546,800	1,099,220
1999	8,311,949	5,736,071	4,879,455	657,821	198,795	3,690,970	2,575,878	1,115,092
2000	8,519,241	5,908,756	5,042,334	664,995	201,427	3,744,022	2,610,485	1,133,537
2001	8,799,998	6,150,475	5,274,183	672,049	204,243	3,811,494	2,649,523	1,161,971
2002	9,118,926	6,430,412	5,543,981	679,073	207,358	3,877,752	2,688,514	1,189,238

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

b. The number of OASDI disabled adult child beneficiaries aged 18–64 also receiving SSI was estimated based on the number of such beneficiaries aged 18 or older for the same year and on the comparative size of the two groups at the end of 1988.

c. December data for OASDI disabled beneficiaries also receiving SSI were not available. Instead, the average of the September 1989 and March 1990 numbers was used.

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

CONTACT: Art Kahn (410) 965-0186.

3.C Interprogram Data

Table 3.C7—Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income (SSI) in March 2002, by sex, age, and race, and average annual benefit in 2001

Sex and age	Total, all races	White	Black	American Indian, Alaska Native	Asian, Pacific Islander
Social Security beneficiaries (thousands)					
Total	39,699	34,839	3,720	354	786
Sex					
Men	16,916	14,984	1,487	126	319
Women	22,783	19,855	2,233	228	467
Age					
15-54	4,347	3,357	811	98	82
55-64	4,928	4,251	525	53	98
65-74	15,922	14,010	1,425	125	361
75 or older	14,502	13,220	959	77	245
Supplemental Security Income recipients (thousands)					
Total	5,002	3,339	1,344	112	207
Sex					
Men	1,928	1,354	477	26	72
Women	3,075	1,985	868	86	135
Age					
15-54	2,806	1,834	849	72	52
55-64	987	677	237	23	50
65-74	635	436	140	11	48
75 or older	575	392	118	6	58
Average annual benefit in 2001^a (dollars)					
Social Security	9,463	9,621	8,204	8,599	8,772
Supplemental Security Income	5,128	5,013	5,256	5,273	6,074

a. For 2001, average benefits are shown. Tables in previous years showed median benefits.

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.C8—Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income (SSI) and number and percentage of Hispanic origin in March 2002, by age and sex, and average annual benefit in 2001

Age	All beneficiaries (thousands)			Hispanic origin ^a (thousands)			Hispanic origin as a percentage of all beneficiaries ^a		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
Social Security beneficiaries									
Total, all ages	39,699	16,916	22,783	2,276	1,019	1,257	5.7	6.0	5.5
15–34	1,473	676	797	175	88	87	11.9	13.0	10.9
35–44	1,227	527	700	109	41	67	8.9	7.8	9.6
45–54	1,648	801	846	151	71	81	9.2	8.8	9.5
55–64	4,928	2,196	2,732	345	162	183	7.0	7.4	6.7
65–74	15,922	7,172	8,750	915	416	499	5.7	5.8	5.7
75 or older	14,502	5,545	8,957	581	241	340	4.0	4.4	3.8
Supplemental Security Income recipients									
Total, all ages	5,002	1,928	3,075	706	258	448	14.1	13.4	14.6
15–34	996	442	555	123	58	64	12.3	13.2	11.6
35–44	893	390	503	104	37	68	11.7	9.4	13.5
45–54	917	392	524	115	52	63	12.5	13.2	12.1
55–64	987	347	640	143	43	100	14.5	12.3	15.7
65–74	635	220	415	116	38	78	18.2	17.2	18.8
75 or older	575	138	437	105	32	74	18.4	23.1	16.9
Average annual benefit in 2001 ^b (dollars)									
Social Security	9,463	10,986	8,332	7,868	9,368	6,653	...	...	...
Supplemental Security Income	5,128	5,478	4,908	5,123	5,269	5,039	...	...	...

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

b. For 2001, average benefits are shown. Tables in previous years showed median benefits.

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

... = not applicable.

CONTACT: Curt Pauzenga (410) 965-7210.

3.E Poverty

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2002 (in dollars)

Year	Unrelated individuals			Families									Annual average CPI ^a
	All ages	Under age 65	Aged 65 or older	2 persons			3 persons	4 persons	5 persons	6 persons	7 persons 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	8,794	8,959	8,259	11,239	11,590	10,419	13,738	17,603	20,819	23,528	...	172.2	
2001	9,039	9,214	8,494	11,569	11,920	10,715	14,128	18,104	21,405	24,195	...	177.1	
2002	9,183	9,359	8,628	11,756	12,110	10,885	14,348	18,392	21,744	24,576	...	179.9	

a. Beginning in January 1978, the Bureau of Labor Statistics introduced a new price index for all urban consumers (CPI-U) for all items (1982-1984 = 100) that forms a continuous series with the earlier index for urban wage earners and for clerical workers as of December 1977.

SOURCE: U.S. Census Bureau, Current Population Survey.

NOTES: ... = not applicable.

Three technical changes in the definition of poverty are described in "Characteristics of the Population Below the Poverty Level, 1980," U.S. Census Bureau, *Current Population Reports*, Series P-60, No. 133: (1) Distinctions based on the sex of the family householder will no longer be made; (2) income thresholds for farm families will be the same as for nonfarm families of the same size and composition, and (3) the increased sample size will now permit separate poverty income criteria for families of 7, 8, and 9 or more persons. Separate criteria for these family sizes by number of children have been developed by the Social Security Administration for the base year 1978 on the same basis as the original poverty matrix for smaller family sizes, and then updated by means of the all-items consumer price index. The dollar thresholds for larger families beginning in 1980 are:

Year	7 persons	8 persons	9 persons or more	Year	7 persons	8 persons	9 persons or more
1980	12,761	14,199	16,896	1992	21,594	24,053	28,745
1981	14,110	15,655	18,572	1993	22,383	24,838	29,529
1982	15,036	16,719	19,698	1994	22,923	25,427	30,300
1983	15,500	17,170	20,310	1995	23,552	26,237	31,280
1984	16,096	17,961	21,247	1996	24,268	27,091	31,971
1985	16,656	18,512	22,083	1997	24,802	27,593	32,566
1986	17,049	18,791	22,497	1998	25,257	28,166	33,339
1987	17,649	19,515	23,105	1999	25,912	28,967	34,417
1988	18,232	20,253	24,129	2000	26,754	29,701	35,060
1989	19,162	21,328	25,480	2001	27,517	30,627	36,286
1990	20,241	22,582	26,848	2002	28,001	30,907	37,062
1991	21,058	23,605	27,942				

CONTACT: Joe Dalaker (301) 763-3213.

Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2001

Age and family status ^a	1959	1970	1975	1980	1985	1990 ^b	2000	2001
Total population ^c (millions)								
All ages	176.5	202.5	210.4	225.0	236.6	248.6	275.9	281.5
Children under 18 in families—	64.0	69.9	64.8	62.2	62.0	64.9	70.6	70.8
With male householder ^d	58.3	60.8	54.1	50.6	49.5	49.5	54.5	54.0
With female householder	5.7	9.0	10.6	11.5	12.5	15.4	16.1	16.8
18–54 ^e	81.0	94.9	104.7	116.3	125.2	132.3	147.4	150.1
55–64	15.5	18.4	19.8	21.7	22.1	21.3	23.8	25.9
65 or older	15.6	19.3	21.7	24.7	27.3	30.1	33.0	33.8
In families	11.9	13.4	14.8	16.7	18.4	20.1	22.3	22.5
Unrelated individuals	3.7	5.8	6.9	8.0	8.9	10.0	10.7	11.2
Men	1.2	1.4	1.5	1.7	2.0	2.3	2.9	3.0
Women	2.5	4.4	5.4	6.3	7.0	7.7	7.8	8.3
Number poor ^c (millions)								
All ages	39.5	25.3	25.9	29.3	33.1	33.6	31.1	32.9
Children under 18 in families—	17.2	10.5	10.9	11.1	12.5	13.3	11.1	11.1
With male householder ^d	13.1	5.7	5.3	5.2	5.8	5.3	4.9	4.7
With female householder	4.1	4.8	5.6	5.9	6.7	8.0	6.2	6.4
18–54 ^e	13.4	8.2	9.7	12.2	14.8	14.6	14.1	15.6
55–64	3.3	2.1	2.0	2.1	2.3	2.1	2.2	2.4
65 or older	5.5	4.7	3.3	3.9	3.5	3.7	3.4	3.4
In families	3.2	2.0	1.2	1.4	1.2	1.2	1.1	1.2
Unrelated individuals	2.3	2.7	2.1	2.4	2.3	2.5	2.2	2.2
Men	0.7	0.5	0.4	0.4	0.4	0.4	0.5	0.5
Women	1.6	2.2	1.7	2.0	1.9	2.1	1.7	1.8
Percentage poor ^c								
All ages	22.4	12.6	12.3	13.0	14.0	13.5	11.3	11.7
Children under 18 in families—	26.9	15.0	16.8	17.9	20.1	20.5	15.7	15.7
With male householder ^d	22.4	9.3	9.8	10.4	11.7	10.7	8.9	8.7
With female householder	72.2	53.4	52.7	50.8	53.6	52.1	38.4	38.2
18–54 ^e	16.5	8.7	9.2	10.5	11.8	11.0	9.6	10.4
55–64	21.5	11.4	10.2	9.5	10.5	9.7	9.4	9.4
65 or older	35.2	24.6	15.3	15.7	12.6	12.2	10.2	10.1
In families	26.9	14.7	8.0	8.5	6.4	5.9	5.1	5.3
Unrelated individuals	61.9	47.1	31.0	30.6	25.6	24.8	20.8	19.7
Men	59.0	38.9	27.7	24.4	20.5	17.3	18.3	15.8
Women	63.3	49.7	31.9	32.3	27.0	26.9	21.8	21.2

a. Income and poverty status refer to the calendar year shown; family status is as of March of the succeeding year.

b. Based on revised methodology.

c. Includes armed forces in the United States living off post or with families on post. Excludes unrelated individuals under age 16.

d. Includes children in families with both spouses present and in families with male householder with no spouse present.

e. Includes persons under age 18 listed as unrelated individual, family householder, spouse of householder, or other family member.

SOURCES: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement. Data for 1970 and 1975 are based on the 1970 Census of Population controls.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

CONTACT: Curt Pauzenga (410) 965-7210.

3.E Poverty

Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2001

Type of money income received during year	Aged family units						Nonaged family units					
	Individuals aged 65 or older living alone or with nonrelatives only			Multiperson families with householder aged 65 or older			Individuals under age 65 living alone or with nonrelatives only			Multiperson families with householder under age 65		
	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a
Number of families and unrelated individuals (millions)	11.2	9	2.2	11.6	11	0.6	35.2	27.9	7.3	62.7	56.5	6.2
	Percentage receiving income of specified type^b											
Earnings	14	17	2	44	45	24	82	93	38	94	97	66
Public program payments												
Social Security ^c	92	94	85	92	94	63	6	5	11	10	10	12
Supplemental Security Income	6	3	19	4	4	18	4	1	13	3	2	10
Other public assistance	2	2	3	4	4	7	10	9	13	11	10	23
Other programs ^d	4	5	2	8	9	2	7	8	3	11	11	7
Other sources												
Dividends, interest, rent	56	64	25	66	69	23	46	53	18	60	65	16
Employment-related pensions, alimony, annuities	39	47	7	51	53	12	6	7	3	16	16	15
	Percentage distribution of income, by type											
Total percent	100	100	100	100	100	100	100	100	100	100	100	100
Earnings	15	15	0	33	33	17	89	90	47	90	91	67
Public program payments												
Social Security ^c	46	43	84	32	31	64	2	1	18	2	2	9
Supplemental Security Income	1	1	9	1	^e	10	1	^e	17	^e	^e	6
Other public assistance	^e	^e	^e	^e	^e	2	2	2	9	1	1	9
Other programs ^d	1	1	1	1	1	1	1	1	3	1	1	2
Other sources												
Dividends, interest, rent	17	18	3	15	15	2	4	4	3	4	4	1
Employment-related pensions, alimony, annuities	20	21	3	18	18	5	2	2	3	3	3	5
Median income (dollars)	14,224	16,681	5,900	33,748	35,316	8,654	24,695	30,358	3,872	55,510	56,361	8,736

a. Poverty status based on money income of all family members after receipt of Social Security and any other cash transfer payments.

b. Received by individuals or any family member at any time during 2000. Most individuals or families received more than one type of income during the year.

c. Social Security may include more than one type of income during the year.

d. Unemployment insurance, workers' compensation, or veterans' payments.

e. Less than 0.05 percent.

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E4—Current living arrangements of persons aged 65 or older, by sex and poverty status, March 2002

Living arrangement	Population (thousands)			Percentage distribution			Percentage officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
All persons aged 65 or older							
Total	33,770	3,414	30,357	100.0	100.0	100.0	10.1
Unrelated individuals	11,250	2,222	9,028	33.3	65.1	29.7	19.7
Family members	22,520	1,192	21,329	66.7	34.9	70.3	5.3
Householder or spouse	20,430	1,046	19,383	60.5	30.7	63.9	5.1
Other relative ^a	2,091	145	1,945	6.2	4.3	6.4	7.0
Poor by own income	848	117	731	2.5	3.4	2.4	13.8
Not poor by own income	1,242	28	1,214	3.7	0.8	4.0	2.3
Men							
Subtotal	14,235	999	13,237	42.2	29.3	43.6	7.0
Unrelated individuals	2,964	469	2,495	8.8	13.7	8.2	15.8
Family members	11,272	530	10,741	33.4	15.5	35.4	4.7
Householder	7,875	311	7,565	23.3	9.1	24.9	3.9
Spouse of householder	2,963	181	2,782	8.8	5.3	9.2	6.1
Other relative ^a	433	38	394	1.3	1.1	1.3	8.9
Poor by own income	154	31	123	0.5	0.9	0.4	20.0
Not poor by own income	278	8	271	0.8	0.2	0.9	2.7
Women							
Subtotal	19,535	2,415	17,120	57.8	70.7	56.4	12.4
Unrelated individuals	8,286	1,753	6,533	24.5	51.4	21.5	21.2
Family members	11,249	661	10,587	33.3	19.4	34.9	5.9
Householder, no husband present	1,623	215	1,408	4.8	6.3	4.6	13.3
Householder with husband present	2,261	119	2,142	6.7	3.5	7.1	5.3
Wife of householder	5,706	220	5,486	16.9	6.5	18.1	3.9
Other relative ^a	1,658	107	1,551	4.9	3.1	5.1	6.4
Poor by own income	694	86	608	2.1	2.5	2.0	12.5
Not poor by own income	964	20	944	2.9	0.6	3.1	2.1

a. Aged family members who are neither the family householder nor the spouse of the householder. Official poverty classification is based on combined income of all related persons living together. Persons in this group are classified here on the basis of official poverty criteria for family income and on a comparison of their own income with official poverty criteria for elderly persons maintaining their own households. The hidden poor are other relatives in nonpoor households whose own income is below the official poverty line for unrelated individuals or married couples.

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement.

NOTES: Living arrangements as of March 2002.

Poverty status in 2001 as reflected by income of unrelated individual or family money income for year compared with official poverty income criterion for families of appropriate size and composition.

Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

CONTACT: Curt Pauzenga (410) 965-7210.

3.E Poverty

Table 3.E6—Percentage distribution of aged families receiving Social Security benefits, by share of income from benefits and race, 2001

Social Security share of money income for year ^a	Individuals aged 65 or older living alone or with nonrelatives only				Multiperson families with householder aged 65 or older			
	Total	Nonpoor	Poor	Percent poor	Total	Nonpoor	Poor	Percent poor
All races ^b								
Number (thousands)	11,236	9,020	2,217	...	11,863	11,174	689	...
Percent	100	100	100	20	100	100	100	6
No Social Security benefits	8	6	15	39	8	6	37	26
Some Social Security benefits	92	94	85	18	92	94	63	4
Less than one-fourth of income	9	11	1	3	22	23	3	1
One-fourth to one-half of income	18	21	3	3	25	26	4	1
One-half to three-fourths of income	19	22	8	8	20	21	8	2
Three-fourths or more of income	47	40	74	31	25	23	49	12
White								
Number (thousands)	9,976	8,217	1,759	...	10,309	9,853	456	...
Percent	100	100	100	18	100	100	100	4
No Social Security benefits	7	5	14	36	7	5	40	25
Some Social Security benefits	93	95	86	16	93	95	60	3
Less than one-fourth of income	9	11	1	3	22	23	3	1
One-fourth to one-half of income	18	22	2	2	26	27	3	0
One-half to three-fourths of income	19	22	7	7	21	21	6	1
Three-fourths or more of income	47	40	75	28	24	23	49	9
Black								
Number (thousands)	1,037	634	403	...	985	846	139	...
Percent	100	100	100	39	100	100	100	14
No Social Security benefits	13	10	17	53	13	11	25	28
Some Social Security benefits	87	90	83	37	87	89	75	12
Less than one-fourth of income	7	11	0	2	22	25	3	2
One-fourth to one-half of income	12	17	3	12	22	24	7	5
One-half to three-fourths of income	15	20	9	22	16	17	13	12
Three-fourths or more of income	53	43	70	51	27	23	51	27

a. Payments under Social Security program any time in 2001 to any family member as reported in the March 2002 Current Population Survey.

b. Includes other races.

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2002 Income Supplement.

NOTES: Civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Bureau of the Census, *Current Population Reports*, Series P-60.

... = not applicable.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E8—Poverty guidelines for families of specified size, 1965–2003 (dollars)

Date of issuance ^a	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment ^b
December 1965	1,540	1,990	2,440	3,130	3,685	4,135	4,635	5,135	500
August 1967	1,600	2,000	2,500	3,200	3,800	4,200	4,700	5,300	500
September 1968	1,600	2,100	2,600	3,300	3,900	4,400	4,900	5,400	500
September 1969	1,800	2,400	3,000	3,600	4,200	4,800	5,400	6,000	600
December 1970	1,900	2,500	3,100	3,800	4,400	5,000	5,600	6,200	600
November 1971	2,000	2,600	3,300	4,000	4,700	5,300	5,900	6,500	600
October 1972	2,100	2,725	3,450	4,200	4,925	5,550	6,200	6,850	650
March 1973	2,200	2,900	3,600	4,300	5,000	5,700	6,400	7,100	700
May 1974	2,330	3,070	3,810	4,550	5,290	6,030	6,770	7,510	740
March 1975	2,590	3,410	4,230	5,050	5,870	6,690	7,510	8,330	820
April 1976	2,800	3,700	4,600	5,500	6,400	7,300	8,200	9,100	900
April 1977	2,970	3,930	4,890	5,850	6,810	7,770	8,730	9,690	960
April 1978	3,140	4,160	5,180	6,200	7,220	8,240	9,260	10,280	1,020
May 1979	3,400	4,500	5,600	6,700	7,800	8,900	10,000	11,100	1,100
April 1980	3,790	5,010	6,230	7,450	8,670	9,890	11,110	12,330	1,220
March 1981	4,310	5,690	7,070	8,450	9,830	11,210	12,590	13,970	1,380
April 1982	4,680	6,220	7,760	9,300	10,840	12,380	13,920	15,460	1,540
February 1983	4,860	6,540	8,220	9,900	11,580	13,260	14,940	16,620	1,680
February 1984	4,980	6,720	8,460	10,200	11,940	13,680	15,420	17,160	1,740
March 1985	5,250	7,050	8,850	10,650	12,450	14,250	16,050	17,850	1,800
February 1986	5,360	7,240	9,120	11,000	12,880	14,760	16,640	18,520	1,880
February 1987	5,500	7,400	9,300	11,200	13,100	15,000	16,900	18,800	1,900
February 1988	5,770	7,730	9,690	11,650	13,610	15,570	17,530	19,490	1,960
February 1989	5,980	8,020	10,060	12,100	14,140	16,180	18,220	20,260	2,040
February 1990	6,280	8,420	10,560	12,700	14,840	16,980	18,120	21,260	2,140
February 1991	6,620	8,880	11,140	13,400	15,660	17,920	20,180	22,440	2,260
February 1992	6,810	9,190	11,570	13,950	16,330	18,710	21,090	23,470	2,380
February 1993	6,970	9,430	11,890	14,350	16,810	19,270	21,730	24,190	2,460
February 1994	7,360	9,840	12,320	14,800	17,280	19,760	22,240	24,720	2,480

(Continued)

3.E Poverty

Table 3.E8—Poverty guidelines for families of specified size, 1965–2003 (dollars)—Continued

Date of issuance ^a	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment ^b
February 1995	7,470	10,030	12,590	15,150	17,710	20,270	22,830	25,390	2,560
March 1996	7,740	10,360	12,980	15,600	18,220	20,840	23,460	26,080	2,620
March 1997	7,890	10,610	13,330	16,050	18,770	21,490	24,210	26,960	2,720
February 1998	8,050	10,850	13,650	16,450	19,250	22,050	24,850	27,650	2,800
March 1999	8,240	11,060	13,880	16,700	19,520	22,340	25,160	27,980	2,820
February 2000	8,350	11,250	14,150	17,050	19,950	22,850	25,750	28,650	2,900
February 2001	8,590	11,610	14,630	17,650	20,670	23,690	26,710	29,730	3,020
February 2002	8,860	11,940	15,020	18,100	21,180	24,260	27,340	30,420	3,080
February 2003	8,980	12,120	15,260	18,400	21,540	24,680	27,820	30,960	3,140

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

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

SOURCE: Department of Health and Human Services, *Federal Register*, vol. 68, no. 26, February 7, 2003, pp. 6456–6458.

NOTES: Except for Alaska and Hawaii. Guidelines for Alaska and Hawaii since 1980 are:

Year	Alaska		Hawaii	
	1 person	Increment	1 person	Increment
1980	4,760	1,520	4,370	1,400
1981	5,410	1,720	4,980	1,580
1982	5,870	1,920	5,390	1,770
1983	6,080	2,100	5,600	1,930
1984	6,240	2,170	5,730	2,000
1985	6,560	2,250	6,040	2,070
1986	6,700	2,350	6,170	2,160
1987	6,860	2,380	6,310	2,190
1988	7,210	2,450	6,650	2,250
1989	7,480	2,550	6,870	2,350
1990	7,840	2,680	7,230	2,460
1991	8,290	2,820	7,610	2,600
1992	8,500	2,980	7,830	2,740
1993	8,700	3,080	8,040	2,820
1994	9,200	3,100	8,470	2,850
1995	9,340	3,200	8,610	2,940
1996	9,660	3,280	8,910	3,010
1997	9,870	3,400	9,070	3,130
1998	10,070	3,500	9,260	3,220
1999	10,320	3,520	9,490	3,240
2000	10,430	3,630	9,590	3,340
2001	10,730	3,780	9,890	3,470
2002	11,080	3,850	10,200	3,540
2003	11,210	3,930	10,330	3,610

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–1970 period. The U.S. Census Bureau, producer of the primary version of the poverty measure (the poverty thresholds), does not produce separate figures for Alaska and Hawaii.

Before 1983, the guidelines shown are for nonfarm families only.

CONTACT: Gordon Fisher (202) 690-5880.

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2002 (in millions of dollars)

Year	Receipts					Expenditures				Assets		
	Total	Net contributions ^a	Income from taxation of benefits	Payments from the general fund of the Treasury ^b	Net interest ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year	
1937	767	765	...	...	2	1	1	...	...	766	766
1938	375	360	...	...	15	10	10	...	...	366	1,132
1939	607	580	...	...	27	14	14	...	...	592	1,724
1940	368	325	...	...	43	62	35	26	...	306	2,031
1945	1,420	1,285	...	...	134	304	274	30	...	1,116	7,121
1950	2,928	2,667	...	...	257	1,022	961	61	...	1,905	13,721
1955	6,167	5,713	...	...	454	5,079	4,968	119	-7	1,087	21,663
1960	11,382	10,866	...	...	516	11,198	10,677	203	318	184	20,324
1965	16,610	16,017	...	...	593	17,501	16,737	328	436	-890	18,235
1966	21,302	20,580	...	...	78	644	18,967	256	444	2,335	20,570
1967	24,034	23,138	78	818	20,382	19,468	406	508	3,652	24,222
1968	25,040	23,719	382	939	23,557	22,643	476	438	1,483	25,704
1969	29,554	27,947	442	1,165	25,176	24,210	474	491	4,378	30,082
1970	32,220	30,256	449	1,515	29,848	28,798	471	579	2,371	32,454
1971	35,877	33,723	488	1,667	34,542	33,414	514	613	1,335	33,789
1972	40,050	37,781	475	1,794	38,522	37,124	674	724	1,528	35,318
1973	48,344	45,975	442	1,928	47,175	45,745	647	783	1,169	36,487
1974	54,688	52,081	447	2,159	53,397	51,623	865	909	1,291	37,777
1975	59,605	56,816	425	2,364	60,395	58,517	896	982	-790	36,987
1976	66,276	63,362	614	2,301	67,876	65,705	959	1,212	-1,600	35,388
1977	72,412	69,572	613	2,227	75,309	73,121	981	1,208	-2,897	32,491
1978	78,094	75,471	615	2,008	83,064	80,361	1,115	1,589	-4,971	27,520
1979	90,274	87,919	557	1,797	93,133	90,573	1,113	1,448	-2,860	24,660
1980	105,841	103,456	540	1,845	107,678	105,083	1,154	1,442	-1,837	22,823
1981	125,361	122,627	675	2,060	126,695	123,803	1,307	1,585	-1,334	21,490
1982	125,198	123,673	680	845	142,119	138,806	1,519	1,793	^e 598	22,088
1983	150,584	138,337	5,541	6,706	152,999	149,221	1,528	2,251	-2,416	19,672
1984	169,328	164,122	2,835	...	105	2,266	161,883	157,841	1,638	2,404	7,445	27,117
1985	184,239	176,958	3,208	2,203	1,871	171,150	167,248	1,592	2,310	^e 8,725	35,842	
1986	197,393	190,741	3,424	160	3,069	181,000	176,813	1,601	2,585	^e 3,239	39,081	
1987	210,736	202,735	3,257	55	4,690	187,668	183,587	1,524	2,557	23,068	62,149	
1988	240,770	229,775	3,384	43	7,568	200,020	195,454	1,776	2,790	40,750	102,899	
1989	264,653	250,195	2,439	34	11,985	212,489	207,971	1,673	2,845	52,164	155,063	
1990	286,653	267,530	4,848	-2,089	16,363	227,519	222,987	1,563	2,969	59,134	214,197	
1991	299,286	272,574	5,864	19	20,829	245,634	240,467	1,792	3,375	53,652	267,849	
1992	311,162	280,992	5,852	14	24,303	259,861	254,883	1,830	3,148	51,301	319,150	
1993	323,277	290,905	5,335	10	27,027	273,104	267,755	1,996	3,353	50,173	369,322	
1994	328,271	293,323	4,995	7	29,946	284,133	279,068	1,645	3,420	44,138	413,460	
1995	342,801	304,620	5,490	-129	32,820	297,760	291,630	2,077	4,052	45,041	458,502	
1996	363,741	321,557	6,471	7	35,706	308,217	302,861	1,802	3,554	55,524	514,026	
1997	397,169	349,946	7,426	2	39,795	322,073	316,257	2,128	3,688	75,096	589,121	
1998	424,848	371,207	9,149	1	44,491	332,324	326,762	1,899	3,662	92,524	681,645	
1999	457,040	396,352	10,899	f	49,788	339,874	334,383	1,809	3,681	117,167	798,812	
2000	490,513	421,391	11,594	...	57,529	358,339	352,652	2,149	3,538	132,174	930,986	
2001	518,100	441,460	11,903	...	64,737	377,546	372,312	1,961	3,273	140,554	1,071,540	
2002	539,706	455,199	12,909	414	71,184	393,749	388,119	2,137	3,493	145,957	1,217,497	

a. Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.

b. Includes payments (1) in 1947–1951 and in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; and (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968.

c. Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in October 1973, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued before April 1985.

d. Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.

e. Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.

f. Less than \$500,000.

SOURCE: Department of the Treasury.

NOTES: Data for all years can be found at www.socialsecurity.gov/OACT/STATS/table4a1.html.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.A OASDI: Trust Funds

Table 4.A2—Disability Insurance, 1957–2002 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Payments from the general fund of the Treasury ^b	Net interest ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1957	709	702	...	...	7	59	57	3	...	649	649
1958	991	966	...	...	25	261	249	12	...	729	1,379
1959	931	891	...	...	40	485	457	50	-22	447	1,825
1960	1,063	1,010	...	...	53	600	568	36	-5	464	2,289
1961	1,104	1,038	...	...	66	956	887	64	5	148	2,437
1962	1,114	1,046	...	...	68	1,183	1,105	66	11	-69	2,368
1963	1,165	1,099	...	...	66	1,297	1,210	68	20	-133	2,235
1964	1,218	1,154	...	...	64	1,407	1,309	79	19	-188	2,047
1965	1,247	1,188	...	...	59	1,687	1,573	90	24	-440	1,606
1966	2,079	2,006	...	16	58	1,947	1,784	137	25	133	1,739
1967	2,379	2,286	...	16	78	2,089	1,950	109	31	290	2,029
1968	3,454	3,316	...	32	106	2,458	2,311	127	20	996	3,025
1969	3,792	3,599	...	16	177	2,716	2,557	138	21	1,075	4,100
1970	4,774	4,481	...	16	277	3,259	3,085	164	10	1,514	5,614
1971	5,031	4,620	...	50	361	4,000	3,783	205	13	1,031	6,645
1972	5,572	5,107	...	51	414	4,759	4,502	233	24	813	7,457
1973	6,443	5,932	...	52	458	5,973	5,764	190	20	470	7,927
1974	7,378	6,826	...	52	500	7,196	6,957	217	22	182	8,109
1975	8,035	7,444	...	90	502	8,790	8,505	256	29	-754	7,354
1976	8,757	8,233	...	103	422	10,366	10,055	285	26	-1,609	5,745
1977	9,570	9,138	...	128	304	11,945	11,547	399	^e	-2,375	3,370
1978	13,810	13,413	...	142	256	12,954	12,599	325	30	856	4,226
1979	15,590	15,114	...	118	358	14,186	13,786	371	30	1,404	5,630
1980	13,871	13,255	...	130	485	15,872	15,515	368	-12	-2,001	3,629
1981	17,078	16,738	...	168	172	17,658	17,192	436	29	-580	3,049
1982	22,715	21,995	...	174	546	17,992	17,376	590	26	^f -358	2,691
1983	20,682	17,991	...	1,121	1,569	18,177	17,524	625	28	2,505	5,195
1984	17,309	15,945	190	...	1,174	18,546	17,898	626	22	-1,237	3,959
1985	19,301	17,191	222	1,017	870	19,478	18,827	608	43	^f 2,363	6,321
1986	19,439	18,399	238	...	803	20,522	19,853	600	68	^f 1,459	7,780
1987	20,303	19,691	^g -36	...	648	21,425	20,519	849	57	-1,122	6,658
1988	22,699	22,039	61	...	600	22,494	21,695	737	61	206	6,864
1989	24,795	23,993	95	...	707	23,753	22,911	754	88	1,041	7,905
1990	28,791	28,539	144	-775	883	25,616	24,829	707	80	3,174	11,079
1991	30,390	29,137	190	...	1,063	28,571	27,695	794	82	1,819	12,898
1992	31,430	30,136	232	...	1,062	32,004	31,112	834	58	-574	12,324
1993	32,301	31,185	281	...	835	35,662	34,613	966	83	-3,361	8,963
1994	52,841	51,373	311	...	1,157	38,879	37,744	1,029	106	13,962	22,925
1995	56,696	54,401	341	-203	2,158	42,055	40,923	1,064	68	14,641	37,566
1996	60,710	57,325	373	...	3,012	45,351	44,189	1,160	2	15,359	52,924
1997	60,499	56,037	470	...	3,992	47,034	45,695	1,280	59	13,465	66,389
1998	64,357	58,966	558	...	4,832	49,931	48,207	1,567	157	14,425	80,815
1999	69,541	63,203	661	...	5,677	53,035	51,381	1,519	135	16,507	97,321
2000	77,920	71,093	721	-836	6,942	56,782	54,983	1,639	159	21,138	118,459
2001	83,903	74,933	811	...	8,158	61,369	59,618	1,741	10	22,534	140,993
2002	87,379	77,272	930	...	9,178	67,905	65,702	2,049	154	19,475	160,468

a. Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.

b. Includes payments (1) in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; and (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956.

c. Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in July 1974, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$14.8 million on unnegotiated checks issued before April 1985.

d. Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.

e. Less than \$500,000.

f. Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.

g. Reflects \$195 million in transfers from the DI trust fund to the general fund of the Treasury to correct estimated amounts transferred for calendar years 1984 and 1985.

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A3—Combined OASI and DI, 1957–2002 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Payments from the general fund of the Treasury ^b	Net interest ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1957	8,090	7,527	...	...	563	7,567	7,404	164	-2	523	23,042
1958	9,108	8,531	...	...	577	8,907	8,576	207	124	201	23,243
1959	9,516	8,943	...	...	572	10,793	10,298	234	260	-1,277	21,966
1960	12,445	11,876	...	...	569	11,798	11,245	240	314	647	22,613
1961	12,937	12,323	...	...	614	13,388	12,749	303	337	-451	22,162
1962	13,699	13,105	...	...	594	15,156	14,461	322	372	-1,457	20,705
1963	16,227	15,640	...	...	587	16,217	15,427	348	442	10	20,715
1964	17,476	16,843	...	...	633	17,020	16,223	375	422	456	21,172
1965	17,857	17,205	...	...	651	19,187	18,311	418	459	-1,331	19,841
1966	23,381	22,585	...	94	702	20,913	20,051	393	469	2,467	22,308
1967	26,413	25,424	...	94	896	22,471	21,417	515	539	3,942	26,250
1968	28,493	27,034	...	414	1,045	26,015	24,954	603	458	2,479	28,729
1969	33,346	31,546	...	458	1,342	27,892	26,767	612	513	5,453	34,182
1970	36,993	34,737	...	465	1,791	33,108	31,884	635	589	3,886	38,068
1971	40,908	38,343	...	538	2,027	38,542	37,197	719	626	2,366	40,434
1972	45,622	42,888	...	526	2,208	43,281	41,625	907	749	2,341	42,775
1973	54,787	51,907	...	494	2,386	53,148	51,508	837	802	1,639	44,414
1974	62,066	58,907	...	499	2,660	60,593	58,581	1,082	931	1,472	45,886
1975	67,640	64,259	...	515	2,866	69,184	67,022	1,152	1,010	-1,544	44,342
1976	75,034	71,595	...	717	2,722	78,242	75,759	1,244	1,239	-3,209	41,133
1977	81,982	78,710	...	741	2,531	87,254	84,667	1,379	1,208	-5,272	35,861
1978	91,903	88,883	...	757	2,264	96,018	92,960	1,440	1,618	-4,115	31,746
1979	105,864	103,034	...	675	2,155	107,320	104,359	1,483	1,477	-1,456	30,291
1980	119,712	116,711	...	670	2,330	123,550	120,598	1,522	1,430	-3,838	26,453
1981	142,438	139,364	...	843	2,231	144,352	140,995	1,743	1,614	-1,914	24,539
1982	147,913	145,667	...	854	1,391	160,111	156,182	2,109	1,820	^e 239	24,778
1983	171,266	156,328	...	6,662	8,276	171,177	166,745	2,153	2,279	89	24,867
1984	186,637	180,067	3,025	105	3,440	180,429	175,739	2,264	2,426	6,208	31,075
1985	203,540	194,149	3,430	3,220	2,741	190,628	186,075	2,200	2,353	^e 11,088	42,163
1986	216,833	209,140	3,662	160	3,871	201,522	196,667	2,202	2,653	^e 4,698	46,861
1987	231,039	222,425	3,221	55	5,338	209,093	204,106	2,373	2,614	21,946	68,807
1988	263,469	251,814	3,445	43	8,168	222,514	217,149	2,513	2,851	40,955	109,762
1989	289,448	274,189	2,534	34	12,692	236,242	230,882	2,427	2,934	53,206	162,968
1990	315,443	296,070	4,992	-2,864	17,245	253,135	247,816	2,270	3,049	62,309	225,277
1991	329,676	301,711	6,054	19	21,892	274,205	268,162	2,587	3,457	55,471	280,747
1992	342,591	311,128	6,084	14	25,365	291,865	285,995	2,664	3,206	50,726	331,473
1993	355,578	322,090	5,616	10	27,862	308,766	302,368	2,963	3,435	46,812	378,285
1994	381,111	344,695	5,306	7	31,103	323,011	316,812	2,674	3,526	58,100	436,385
1995	399,497	359,021	5,831	-332	34,977	339,815	332,554	3,141	4,120	59,683	496,068
1996	424,451	378,881	6,844	7	38,718	353,569	347,050	2,962	3,556	70,883	566,950
1997	457,668	405,984	7,896	2	43,787	369,108	361,952	3,409	3,747	88,560	655,510
1998	489,204	430,174	9,707	1	49,323	382,255	374,969	3,467	3,819	106,950	762,460
1999	526,582	459,556	11,559	^f	55,466	392,908	385,765	3,328	3,816	133,673	896,133
2000	568,433	492,484	12,314	-836	64,471	415,121	407,635	3,788	3,698	153,312	1,049,445
2001	602,003	516,393	12,715	...	72,895	438,916	431,931	3,702	3,283	163,088	1,212,533
2002	627,085	532,471	13,839	414	80,362	461,653	453,821	4,185	3,647	165,432	1,377,965

- a. Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- b. Includes payments (1) in 1947–1951 and in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; and (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968.
- c. Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in October 1973, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$102.8 million on unnegotiated checks issued before April 1985.
- d. Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.
- e. Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.
- f. Less than \$500,000.

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.A OASDI: Trust Funds

Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2002 (in millions of dollars)

Year	Total benefits	Cash benefits ^a		Service benefits		Rehabilitation services ^b		Personal income ^c	Total benefits as percentage of personal income
		Old-Age and Survivors Insurance ^d	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance	Old-Age and Survivors Insurance	Disability Insurance		
1937	1	1	...	...	...	...	...	74,300	e
1938	10	10	...	...	...	...	...	68,600	e
1939	14	14	...	...	...	...	...	73,100	e
1940	35	35	...	...	...	...	...	78,600	e
1945	274	274	...	...	...	...	...	171,900	0.2
1950	961	961	...	...	...	...	...	229,900	0.4
1955	4,968	4,968	...	...	...	...	...	316,800	1.6
1956	5,715	5,715	...	...	...	...	...	340,000	1.7
1957	7,404	7,347	57	...	...	...	...	359,300	2.1
1958	8,576	8,327	249	...	...	...	...	370,000	2.3
1959	10,298	9,842	457	...	...	...	...	394,000	2.6
1960	11,245	10,677	568	...	...	...	...	412,700	2.7
1961	12,749	11,862	887	...	...	...	...	430,300	3.0
1962	14,461	13,356	1,105	...	...	...	...	457,900	3.2
1963	15,427	14,217	1,210	...	...	...	...	481,000	3.2
1964	16,223	14,914	1,309	...	...	...	...	515,800	3.1
1965	18,311	16,737	1,573	...	...	...	...	557,400	3.3
1966	21,070	18,267	1,781	891	128	f	3	606,400	3.5
1967	25,967	19,468	1,939	3,353	1,197	f	11	650,400	4.0
1968	30,651	22,642	2,294	4,179	1,518	1	16	714,500	4.3
1969	33,371	24,209	2,542	4,739	1,865	1	15	780,800	4.3
1970	38,982	28,796	3,067	5,124	1,975	2	18	841,100	4.6
1971	45,065	33,413	3,758	5,751	2,117	2	24	905,100	5.0
1972	50,269	37,122	4,473	6,318	2,325	2	29	994,300	5.1
1973	61,091	45,741	5,718	7,057	2,526	3	46	1,113,400	5.5
1974	70,996	51,618	6,903	9,099	3,318	5	54	1,225,600	5.8
1975	82,611	58,509	8,414	11,315	4,273	9	91	1,331,700	6.2
1976	94,180	65,699	9,966	13,340	5,080	6	89	1,475,400	6.4
1977	106,443	73,113	11,463	15,737	6,038	8	84	1,637,100	6.5
1978	117,894	80,352	12,513	17,682	7,252	9	86	1,848,300	6.4
1979	133,691	90,556	13,708	20,623	8,708	18	78	2,081,500	6.4
1980	156,298	105,074	15,437	25,064	10,635	8	78	2,323,900	6.7
1981	184,450	123,795	17,199	30,342	13,113	8	-8	2,599,400	7.1
1982	207,268	138,800	17,338	35,631	15,455	6	38	2,768,400	7.5
1983	224,524	149,502	17,530	39,337	18,106	6	42	2,946,900	7.6
1984	238,682	157,862	17,900	43,257	19,661	f	1	3,274,800	7.3
1985	256,723	167,360	18,836	47,580	22,947	f	f	3,515,000	7.3
1986	272,698	176,845	19,847	49,758	26,239	...	9	3,712,400	7.3
1987	284,487	183,644	20,512	49,496	30,820	...	16	3,962,500	7.2
1988	303,717	195,522	21,692	52,517	33,970	...	16	4,272,100	7.1
1989	329,193	207,977	22,873	60,011	38,294	...	38	4,599,800	7.2
1990	356,536	222,993	24,803	66,239	42,468	...	32	4,903,200	7.3
1991	386,912	240,436	27,662	71,549	47,229	...	36	5,085,400	7.6
1992	419,325	254,939	31,091	83,895	49,367	...	33	5,390,400	7.8
1993	449,896	267,804	34,598	93,487	53,979	...	28	5,610,000	8.0
1994	478,775	279,118	37,717	103,282	58,618	...	40	5,888,000	8.1
1995	513,959	291,682	40,898	116,368	64,972	...	39	6,200,900	8.3
1996	544,350	302,914	44,174	128,632	68,598	...	31	6,547,400	8.3
1997	572,542	316,311	45,659	137,762	72,757	...	53	6,937,000	8.3
1998	585,156	326,817	48,173	133,990	76,125	...	51	7,426,000	7.9
1999	595,326	334,437	51,331	128,766	80,724	...	68	7,786,500	7.6
2000	625,060	352,706	54,938	128,458	88,893	...	63	8,406,600	7.4
2001	672,853	372,370	59,577	141,183	99,663	...	60	8,685,300	7.7
2002	714,804	388,170	65,645	149,944	110,969	...	75	8,948,100	8.0

a. Unnegotiated checks not deducted.

b. Vocational rehabilitation services to disabled workers and disabled children under the 1965 Amendments to the Social Security Act and to disabled widow(er)s under the 1967 Amendments to the Social Security Act.

c. Figures subject to revision.

d. For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.

e. Less than 0.05 percent.

f. Less than \$500,000.

SOURCES: Department of the Treasury and Bureau of Economic Analysis.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2002
(in millions of dollars)

Year	Retired-worker and dependents benefits				Survivors benefits				Special age-72 beneficiaries	Lump-sum death payments
	Total	Retired workers	Wives and husbands	Children	Children	Widowed mothers and fathers	Widow(er)s	Parents		
1937	1	...	...	...	...	...	...	...	...	1
1938	10	...	...	...	...	...	...	...	...	10
1939	14	...	...	...	...	...	...	...	...	14
1940	35	15	2	a	3	2	a	a	...	9
1945	274	126	21	2	52	27	20	1	...	26
1950	961	557	88	6	135	49	89	3	...	33
1955	4,968	3,253	466	29	532	163	396	16	...	113
1956	5,715	3,793	536	33	581	177	469	17	...	109
1957	7,347	4,888	756	43	651	198	653	19	...	139
1958	8,327	5,567	851	56	720	223	757	20	...	133
1959	9,842	6,548	982	77	855	263	921	25	...	171
1960	10,677	7,053	1,051	92	945	286	1,057	28	...	164
1961	11,862	7,802	1,124	106	1,080	316	1,232	31	...	171
1962	13,356	8,813	1,216	134	1,171	336	1,470	34	...	183
1963	14,217	9,391	1,258	146	1,222	348	1,612	34	...	206
1964	14,914	9,854	1,277	150	1,275	354	1,754	33	...	216
1965	16,737	10,984	1,383	175	1,515	388	2,041	35	...	217
1966	18,267	11,727	1,429	216	1,812	415	2,351	35	44	237
1967	19,468	12,372	1,456	221	1,855	420	2,545	34	313	252
1968	22,642	14,278	1,673	253	2,207	478	3,117	37	330	269
1969	24,209	15,385	1,750	260	2,322	490	3,371	36	303	291
1970	28,796	18,438	2,029	303	2,760	574	4,055	39	305	294
1971	33,413	21,544	2,323	352	3,168	630	4,763	41	285	306
1972	37,122	24,143	2,532	382	3,433	679	5,326	43	263	320
1973	45,741	29,336	3,000	457	4,002	801	7,505	48	264	329
1974	51,618	33,369	3,309	533	4,399	898	8,497	49	237	327
1975	58,509	38,079	3,719	634	4,888	1,009	9,597	50	196	337
1976	65,699	43,083	4,117	736	5,336	1,113	10,757	51	174	332
1977	73,113	48,186	4,559	830	5,759	1,191	12,068	52	157	312
1978	80,352	53,255	4,983	921	6,093	1,284	13,278	51	142	344
1979	90,556	60,379	5,554	1,014	6,608	1,409	15,071	52	128	340
1980	105,074	70,358	6,405	1,142	7,389	1,572	17,638	55	119	394
1981	123,795	83,614	7,543	1,321	8,307	1,760	20,749	58	110	332
1982	138,800	95,123	8,539	1,223	8,204	1,861	23,488	59	100	203
1983	149,502	103,578	9,328	1,143	7,911	1,771	25,425	56	85	205
1984	157,862	109,957	9,860	1,135	7,775	1,474	27,325	53	71	212
1985	167,360	116,823	10,517	1,140	7,762	1,474	29,330	51	57	207
1986	176,845	123,584	11,152	1,166	7,843	1,457	31,345	48	47	203
1987	183,644	128,513	11,598	1,183	7,846	1,388	32,833	44	36	203
1988	195,522	136,987	12,292	1,219	8,120	1,392	35,233	43	29	208
1989	207,977	146,027	13,054	1,249	8,254	1,401	37,723	41	21	206
1990	222,993	156,756	13,953	1,316	8,564	1,437	40,705	39	16	206
1991	240,436	169,142	14,986	1,405	9,022	1,490	44,139	38	12	202
1992	254,939	179,372	15,810	1,494	9,431	1,521	47,060	37	9	206
1993	267,804	188,440	16,356	1,563	9,897	1,547	49,746	36	6	214
1994	279,118	196,400	16,854	1,637	10,293	1,551	52,124	34	4	220
1995	291,682	205,315	17,348	1,715	10,717	1,573	54,761	32	3	218
1996	302,914	213,423	17,715	1,799	11,217	1,486	57,025	31	1	218
1997	316,311	223,554	18,154	1,882	11,660	1,466	59,349	30	1	216
1998	326,817	232,324	18,395	1,940	11,936	1,435	60,540	29	a	218
1999	334,437	238,478	18,415	1,992	12,125	1,415	61,769	27	a	216
2000	352,706	253,542	18,969	2,133	12,532	1,406	63,884	26	a	214
2001	372,370	268,976	19,491	2,332	13,134	1,441	66,758	26	a	212
2002	388,170	281,624	19,884	2,475	13,690	1,476	68,782	25	a	213

a. Less than \$500,000.

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

NOTES: Unnegotiated checks not deducted.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.A OASDI: Trust Funds

Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2002 (in millions of dollars)

Year	Total	Disabled workers	Wives and husbands	Children
1957	57	57	...	...
1958	249	246	1	1
1959	457	390	29	38
1960	568	489	32	48
1961	887	724	54	109
1962	1,105	888	68	149
1963	1,210	965	73	172
1964	1,309	1,044	79	186
1965	1,573	1,246	95	232
1966	1,781	1,394	108	280
1967	1,939	1,519	113	307
1968	2,294	1,804	131	360
1969	2,542	2,014	139	389
1970	3,067	2,448	165	454
1971	3,758	3,028	192	539
1972	4,473	3,626	224	623
1973	5,718	4,676	281	760
1974	6,903	5,662	320	920
1975	8,414	6,908	385	1,121
1976	9,966	8,190	447	1,328
1977	11,463	9,456	505	1,503
1978	12,513	10,315	541	1,657
1979	13,708	11,333	581	1,794
1980	15,437	12,816	638	1,983
1981	17,199	14,379	684	2,136
1982	17,338	14,811	652	1,875
1983	17,530	15,196	607	1,728
1984	17,900	15,623	536	1,741
1985	18,836	16,483	545	1,809
1986	19,847	17,409	547	1,890
1987	20,512	18,053	532	1,926
1988	21,692	19,165	529	1,999
1989	22,873	20,314	523	2,036
1990	24,803	22,113	531	2,159
1991	27,662	24,738	550	2,374
1992	31,091	27,856	572	2,663
1993	34,598	30,913	572	3,112
1994	37,717	33,711	579	3,428
1995	40,898	36,610	577	3,711
1996	44,174	39,625	515	4,034
1997	45,659	41,083	479	4,098
1998	48,173	43,467	457	4,249
1999	51,331	46,459	433	4,439
2000	54,938	49,848	421	4,670
2001	59,577	54,244	416	4,917
2002	65,645	59,886	423	5,337

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

NOTES: Unnegotiated checks not deducted.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2002

Year	Number ^a (thousands)			Earnings					Social Security numbers issued ^b (thousands)
	Total	With maximum earnings	New entrants into covered employment ^c	Total in covered employment ^d (millions of dollars)	Reported taxable ^a		Average per worker (dollars)		
					Amount (millions of dollars)	Percentage of total	Total earnings ^d	Reported taxable	
1937	32,900	1,031	32,900	32,200	29,620	92.0	979	900	37,139
1940	35,390	1,196	4,430	35,700	32,970	92.4	1,009	932	5,227
1945	46,390	6,361	3,480	71,600	62,950	87.9	1,543	1,357	3,321
1950	48,280	13,936	2,520	109,800	87,500	79.7	2,274	1,812	2,891
1951	58,120	14,270	6,000	148,900	120,770	81.1	2,562	2,078	4,927
1952	59,580	16,606	3,500	159,900	128,640	80.5	2,684	2,159	4,363
1953	60,840	19,013	3,090	173,000	135,870	78.5	2,844	2,233	3,464
1954	59,610	18,866	2,360	171,900	133,520	77.7	2,884	2,240	2,743
1955	65,200	16,704	4,760	196,100	157,540	80.3	3,008	2,416	4,323
1956	67,610	19,236	3,660	216,800	170,720	78.8	3,207	2,525	4,376
1957	70,590	21,095	3,380	233,900	181,380	77.5	3,314	2,569	3,639
1958	69,770	21,328	2,450	236,500	180,720	76.4	3,390	2,590	2,290
1959	71,700	19,112	3,180	255,000	202,310	79.3	3,556	2,822	3,388
1960	72,530	20,310	3,130	265,200	207,000	78.1	3,656	2,854	3,415
1961	72,820	21,265	2,990	270,700	209,640	77.4	3,717	2,879	3,370
1962	74,280	23,154	3,360	289,000	219,050	75.8	3,891	2,949	4,519
1963	75,540	24,570	3,520	302,300	225,550	74.6	4,002	2,986	6,617
1964	77,430	26,717	3,890	324,500	236,390	72.8	4,191	3,053	5,623
1965	80,680	29,136	4,620	351,700	250,730	71.3	4,359	3,108	6,131
1966	84,600	20,498	5,080	390,700	312,540	80.0	4,618	3,694	6,506
1967	87,040	22,948	4,530	422,300	329,960	78.1	4,852	3,791	5,920
1968	89,380	19,120	4,830	460,000	375,840	81.7	5,147	4,205	5,862
1969	92,060	22,577	5,160	502,800	402,550	80.1	5,462	4,373	6,289
1970	93,090	24,224	4,440	531,600	415,600	78.2	5,711	4,464	6,132
1971	93,340	26,404	4,470	559,700	426,960	76.3	5,996	4,574	6,401
1972	96,240	24,074	5,150	617,900	484,110	78.3	6,420	5,030	9,564
1973	99,830	20,250	5,670	686,700	561,850	81.8	6,879	5,628	10,038
1974	101,330	15,310	4,940	746,700	636,760	85.3	7,369	6,284	7,998
1975	100,200	15,070	4,120	787,600	664,660	84.4	7,860	6,633	8,164
1976	102,600	15,330	4,700	874,700	737,700	84.3	8,525	7,190	9,043
1977	105,800	15,700	5,070	960,100	816,550	85.0	9,075	7,718	7,724
1978	110,600	17,050	5,460	1,092,600	915,600	83.8	9,879	8,278	5,260
1979	112,700	11,236	4,883	1,222,200	1,067,000	87.3	10,845	9,468	5,213
1980	113,000	9,903	4,243	1,328,800	1,180,700	88.9	11,759	10,449	5,984
1981	113,000	8,594	4,090	1,450,900	1,294,100	89.2	12,840	11,452	5,581
1982	111,800	7,929	3,408	1,516,600	1,365,300	90.0	13,565	12,212	5,362
1983	112,100	7,044	3,914	1,615,200	1,454,100	90.0	14,409	12,971	6,699
1984	116,300	7,421	4,743	1,800,800	1,608,800	89.3	15,484	13,833	5,980
1985	119,800	7,766	4,756	1,936,800	1,722,600	88.9	16,167	14,379	5,720
1986	122,900	7,624	4,641	2,081,800	1,844,400	88.6	16,939	15,007	5,711
1987	125,600	7,735	4,956	2,237,000	1,960,000	87.6	17,811	15,605	11,621
1988	129,600	8,483	5,489	2,432,800	2,088,400	85.8	18,772	16,114	11,370
1989	131,700	8,110	4,856	2,578,700	2,239,500	86.8	19,580	17,005	8,049
1990	133,600	7,575	4,012	2,703,800	2,358,000	87.2	20,238	17,650	9,054
1991	133,000	7,483	3,541	2,760,500	2,422,500	87.8	20,756	18,214	7,509
1992	134,000	7,667	3,918	2,917,800	2,532,900	86.8	21,775	18,902	6,819
1993	136,100	7,617	4,204	3,022,900	2,636,100	87.2	22,211	19,369	5,893
1994	138,200	7,518	4,591	3,197,000	2,785,200	87.1	23,133	20,153	5,816
1995	141,000	8,191	4,621	3,401,800	2,919,100	85.8	24,126	20,703	5,465
1996	143,400	8,682	4,620	3,587,600	3,073,500	85.7	25,018	21,433	5,533
1997	146,145	9,022	4,710	3,858,721	3,285,000	85.1	26,403	22,478	5,413
1998	148,786	9,372	4,904	4,172,641	3,524,900	84.5	28,045	23,691	5,288
1999 ^e	151,293	9,211	4,957	4,461,350	3,749,700	84.0	29,488	24,784	5,306
2000 ^e	153,517	9,484	4,958	4,784,417	3,987,100	83.3	31,165	25,972	5,476
2001 ^f	153,743	9,092	4,425	4,869,241	4,142,573	85.1	31,671	26,945	5,883
2002 ^g	152,795	^h	^h	4,960,638	4,227,023	85.2	32,466	27,665	5,699

a. Relates to wage and salary workers for 1937–1950. Beginning in 1951, includes self-employment. See Table 2.A3 for annual maximum taxable earnings.
 b. Excludes railroad account numbers. Since program began, 414 million Social Security numbers have been issued. Some individuals have been issued more than one number.
 c. Workers reported with first taxable earnings under program in specified year. During 1937–2001, 309.5 million different persons reported with taxable earnings.
 d. Total wages, including estimated amounts above taxable limit, for 1937–1950. Beginning in 1951, also includes reported total net earnings of self-employed persons.
 e. Preliminary data.
 f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
 g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.
 h. Data not available.

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Labor Statistics; and Bureau of Economic Analysis.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2002

Year	Number ^a (thousands)		Wage and salary					Self-employed				
			Total in covered employment ^b (millions of dollars)	Reported taxable		Average per worker (dollars)		Total in covered employment ^c (millions of dollars)	Reported taxable		Average per worker (dollars)	
	Amount ^d (millions of dollars)	Percentage of total wages		Total wages ^b	Reported taxable ^d	Amount ^d (millions of dollars)	Percentage of total self-employment		Total earnings ^c	Reported taxable ^d		
											Wage and salary	Self-employed
1951	54,630	4,190	132,500	111,250	84.0	2,425	2,036	16,400	9,520	58.0	3,914	2,272
1952	56,060	4,240	143,500	118,880	82.8	2,560	2,121	16,400	9,760	59.5	3,868	2,302
1953	57,220	4,340	156,000	125,840	80.7	2,726	2,199	17,000	10,030	59.0	3,917	2,311
1954	55,940	4,350	155,100	123,410	79.6	2,773	2,206	16,800	10,110	60.2	3,862	2,324
1955	59,560	6,810	171,600	141,810	82.6	2,881	2,381	24,500	15,730	64.2	3,598	2,310
1956	61,560	7,390	188,500	153,010	81.2	3,062	2,486	28,300	17,710	62.6	3,829	2,396
1957	64,730	7,150	205,500	163,990	79.8	3,175	2,533	28,400	17,390	61.2	3,972	2,432
1958	64,040	7,130	208,000	163,140	78.4	3,248	2,547	28,500	17,580	61.7	3,997	2,466
1959	66,000	7,060	225,100	183,620	81.6	3,411	2,782	29,900	18,690	62.5	4,235	2,647
1960	66,980	6,870	236,000	188,580	79.9	3,523	2,815	29,200	18,420	63.1	4,250	2,681
1961	67,360	6,790	240,700	190,850	79.3	3,573	2,833	30,000	18,790	62.6	4,418	2,767
1962	68,890	6,720	257,700	200,130	77.7	3,741	2,905	31,300	18,920	60.4	4,658	2,815
1963	70,310	6,590	270,600	206,840	76.4	3,849	2,942	31,700	18,710	59.0	4,810	2,839
1964	72,230	6,480	290,900	217,430	74.7	4,027	3,010	33,600	18,960	56.4	5,185	2,926
1965	75,430	6,550	311,400	230,830	74.1	4,128	3,060	40,300	19,900	49.4	6,153	3,038
1966	79,460	6,630	346,700	287,860	83.0	4,363	3,623	44,000	24,680	56.1	6,637	3,722
1967	82,020	6,470	377,500	305,670	81.0	4,603	3,727	44,800	24,290	54.2	6,924	3,754
1968	84,470	6,570	413,600	348,500	84.3	4,896	4,126	46,400	27,340	58.9	7,062	4,161
1969	87,200	6,350	455,700	375,010	82.3	5,226	4,301	47,100	27,540	58.5	7,417	4,337
1970	88,180	6,270	483,600	388,680	80.4	5,484	4,408	48,000	26,920	56.1	7,656	4,293
1971	88,460	6,290	509,000	399,550	78.5	5,754	4,517	50,700	27,410	54.1	8,060	4,358
1972	91,220	6,600	563,300	452,050	80.3	6,175	4,956	54,600	32,060	58.7	8,273	4,858
1973	94,610	7,100	624,400	523,450	83.8	6,600	5,533	62,300	38,400	61.6	8,775	5,408
1974	96,190	7,040	681,600	594,400	87.2	7,086	6,179	65,200	42,360	65.0	9,261	6,017
1975	94,900	7,000	717,200	621,100	86.6	7,557	6,545	70,400	43,560	61.9	10,057	6,223
1976	97,230	7,400	797,200	689,200	86.4	8,199	7,088	76,800	48,500	63.2	10,378	6,554
1977	100,450	7,480	879,500	763,600	86.8	8,935	7,602	80,600	52,950	65.7	10,775	7,079
1978	104,810	8,040	998,900	856,100	85.7	9,531	8,168	93,700	59,500	63.5	11,654	7,400
1979	106,900	8,200	1,122,000	997,500	88.9	10,496	9,331	100,200	69,500	69.4	12,220	8,476
1980	107,200	8,200	1,231,000	1,109,000	90.1	11,483	10,345	97,800	71,700	73.3	11,927	8,744
1981	107,300	8,250	1,352,000	1,220,000	90.2	12,600	11,370	98,900	74,100	74.9	11,988	8,982
1982	105,800	8,550	1,418,000	1,290,000	91.0	13,403	12,193	98,600	75,300	76.4	11,532	8,807
1983	105,900	9,200	1,502,000	1,369,000	91.1	14,183	12,927	113,200	85,100	75.2	12,304	9,250
1984	109,900	9,900	1,671,500	1,515,000	90.6	15,209	13,785	129,300	93,800	72.5	13,061	9,475
1985	113,100	10,600	1,794,500	1,621,000	90.3	15,866	14,332	142,300	101,600	71.4	13,425	9,585
1986	115,900	11,200	1,921,000	1,730,800	90.1	16,575	14,934	160,800	113,600	70.6	14,357	10,143
1987	118,200	12,000	2,057,100	1,835,100	89.2	17,404	15,525	179,900	124,900	69.4	14,992	10,408
1988	122,100	12,400	2,224,700	1,952,000	87.7	18,220	15,987	208,100	136,400	65.5	16,782	11,000
1989	123,900	12,900	2,367,800	2,096,000	88.5	19,111	16,917	210,900	143,500	68.0	16,349	11,124
1990	126,100	12,500	2,510,000	2,222,000	88.5	19,905	17,621	193,800	136,000	70.2	15,504	10,880
1991	125,200	12,800	2,565,000	2,283,000	89.0	20,487	18,235	195,500	139,500	71.4	15,273	10,898
1992	126,000	13,100	2,711,000	2,386,000	88.0	21,516	18,937	206,800	146,600	71.0	15,786	11,214
1993	128,100	13,200	2,808,900	2,483,400	88.4	21,927	19,386	214,000	152,700	71.4	16,212	11,568
1994	130,100	13,300	2,964,100	2,624,500	88.5	22,783	20,173	232,900	160,700	69.0	17,511	12,083
1995	132,800	13,500	3,159,100	2,754,300	87.2	23,788	20,740	242,700	164,800	67.9	17,978	12,207
1996	135,100	13,900	3,331,900	2,901,700	87.1	24,662	21,478	255,700	171,800	67.2	18,396	12,360
1997	137,765	14,020	3,586,721	3,104,300	86.5	26,035	22,533	272,000	180,700	66.4	19,401	12,889
1998	140,386	14,230	3,882,341	3,333,700	85.9	27,655	23,747	290,300	191,200	65.9	20,401	13,436
1999 ^e	142,653	14,550	4,154,350	3,548,100	85.4	29,122	24,872	307,000	201,600	65.7	21,100	13,856
2000 ^e	144,667	14,800	4,460,317	3,778,900	84.7	30,832	26,121	324,100	208,200	64.2	21,899	14,068
2001 ^f	144,803	14,950	4,541,341	3,928,000	86.5	31,362	27,127	327,900	214,573	65.4	21,933	14,353
2002 ^g	144,034	14,619	4,617,951	4,002,759	86.7	32,062	27,790	342,687	224,264	65.4	23,441	15,341

a. Represents total number in specified type of employment. Persons with both types of covered employment during the year are included in each type.

b. Total wages, including estimated amounts above the taxable limit.

c. Reported self-employment net earnings.

d. See Table 2.A3 for annual maximum taxable earnings.

e. Preliminary data.

f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.

g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Labor Statistics; and Bureau of Economic Analysis.

NOTE: See Table 4.B1 for wage and salary data before 1951.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2001

Year	All workers ^a			Wage and salary			Self-employed ^b		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
<i>Number (thousands)</i>									
1937	32,900	23,810	9,090	32,900	23,810	9,090	...	...	...
1940	35,390	25,570	9,820	35,390	25,570	9,820	...	...	...
1945	46,390	28,820	17,570	46,390	28,820	17,570	...	...	...
1950	48,280	32,620	15,660	48,280	32,620	15,660	...	...	...
1955	65,200	43,140	22,060	59,560	38,240	21,320	6,810	5,980	830
1960	72,530	47,900	24,630	66,980	43,100	23,880	6,870	5,990	880
1965	80,680	51,990	28,690	75,430	47,500	27,930	6,550	5,640	910
1970	93,090	57,330	35,760	88,180	53,180	35,000	6,270	5,370	900
1975	100,200	59,520	40,680	94,900	55,140	39,760	7,000	5,790	1,210
1980	113,000	64,288	48,712	107,200	59,751	47,449	8,200	6,407	1,793
1985	119,800	66,113	53,687	113,100	61,285	51,815	10,600	7,623	2,977
1986	122,900	67,412	55,488	115,900	62,398	53,502	11,200	7,932	3,268
1987	125,600	68,591	57,009	118,200	63,306	54,894	12,000	8,450	3,550
1988	129,600	70,596	59,004	122,100	65,270	56,830	12,400	8,630	3,770
1989	131,700	71,517	60,183	123,900	66,105	57,795	12,900	8,842	4,058
1990	133,600	72,291	61,309	126,100	67,064	59,036	12,500	8,526	3,974
1991	133,000	71,787	61,213	125,200	66,406	58,794	12,800	8,669	4,131
1992	134,000	72,016	61,984	126,000	66,543	59,457	13,100	8,797	4,303
1993	136,100	73,154	62,946	128,100	67,673	60,427	13,200	8,840	4,360
1994	138,200	73,989	64,211	130,100	68,481	61,619	13,300	8,840	4,460
1995	141,000	75,444	65,556	132,800	69,900	62,900	13,500	8,908	4,592
1996	143,400	76,241	67,158	135,100	70,670	64,429	13,900	9,074	4,826
1997	146,145	77,498	68,647	137,765	71,910	65,855	14,020	9,078	4,942
1998	148,786	78,671	70,115	140,386	73,111	67,275	14,230	9,108	5,122
1999 ^c	151,293	79,868	71,425	142,653	74,206	68,447	14,550	9,240	5,310
2000 ^c	153,517	80,922	72,591	144,667	75,132	69,535	14,800	9,266	5,534
2001 ^c	153,743	80,992	72,748	144,803	75,218	69,585	14,950	9,229	5,721
<i>Median earnings ^d (dollars)</i>									
1937	761	945	484	761	945	484	...	...	...
1940	746	935	472	746	935	472	...	...	...
1945	1,159	1,654	770	1,159	1,654	770	...	...	...
1950	1,926	2,532	1,124	1,926	2,532	1,124	...	...	...
1955	2,438	3,315	1,351	2,383	3,348	1,338	2,397	2,550	1,552
1960	2,894	3,879	1,679	2,833	3,875	1,676	2,903	3,129	1,695
1965	3,414	4,685	1,984	3,319	4,630	1,979	3,858	4,242	1,898
1970	4,375	6,180	2,735	4,317	6,173	2,770	5,104	5,683	2,360
1975	5,803	8,250	3,730	5,790	8,315	3,794	6,700	7,846	3,113
1980	8,549	11,963	6,012	8,612	12,166	6,106	8,699	10,572	4,133
1985	11,265	14,959	8,293	11,638	15,706	8,525	9,877	12,301	5,529
1986	11,831	15,579	8,796	12,064	16,025	9,019	10,424	12,908	6,152
1987	12,327	16,073	9,261	12,576	16,559	9,500	10,886	13,401	6,573
1988	12,825	16,613	9,753	13,086	17,055	9,992	11,478	14,090	7,036
1989	13,314	17,014	10,265	13,762	17,800	10,577	11,602	14,538	7,010
1990	13,898	17,582	10,837	14,432	18,483	11,199	11,220	14,097	6,898
1991	14,278	17,765	11,369	14,859	18,730	11,767	11,125	13,703	7,186
1992	14,739	18,208	11,842	15,386	19,292	12,268	11,392	13,966	7,452
1993	15,000	18,430	12,093	15,665	19,516	12,546	11,595	14,128	7,720
1994	15,560	19,249	12,422	16,010	19,969	12,807	12,051	14,737	8,002
1995	16,108	19,907	12,897	16,618	20,672	13,296	12,198	14,931	8,301
1996	16,712	20,779	13,335	17,256	21,591	13,763	12,481	15,300	8,628
1997	17,562	21,814	14,043	18,127	22,693	14,482	12,910	15,911	8,944
1998	18,513	23,028	14,834	19,103	23,920	15,290	13,462	16,565	9,365
1999 ^c	19,266	23,925	15,482	19,885	24,839	15,956	14,046	17,334	9,795
2000 ^c	20,217	25,021	16,302	20,872	25,978	16,814	14,399	17,785	10,118
2001 ^c	20,826	25,574	16,968	21,516	26,528	17,518	14,349	17,881	10,215

a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.

b. Not covered before 1951.

c. Preliminary data.

d. For all workers, medians relate to combined earnings from wage and salary employment and self-employment. For all wage and salary workers, medians relate to wages and salaries only.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: . . . = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2001

Year	All workers ^a			All self-employed workers			Annual maximum taxable earnings (dollars)
	Total	Men	Women	Total	Men	Women	
1937	96.9	95.8	99.7	...	...	...	3,000
1940	96.6	95.4	99.7	...	...	...	3,000
1945	86.3	78.6	98.9	...	...	...	3,000
1950	71.1	59.9	94.6	...	...	...	3,000
1951	75.5	64.6	96.7	65.4	62.6	83.3	3,600
1952	72.1	60.0	95.4	64.1	61.2	83.5	3,600
1953	68.8	55.5	93.8	62.9	59.5	83.1	3,600
1954	68.4	55.4	93.0	62.6	58.8	82.8	3,600
1955	74.4	63.4	95.9	74.0	72.3	86.3	4,200
1956	71.6	59.7	94.5	71.2	69.1	86.0	4,200
1957	70.1	58.7	93.1	69.6	67.2	85.5	4,200
1958	69.4	58.4	91.8	68.8	66.3	85.7	4,200
1959	73.3	62.7	94.3	72.0	69.6	88.0	4,800
1960	72.0	60.9	93.5	71.6	69.2	87.7	4,800
1961	70.8	59.6	92.4	70.3	67.8	86.9	4,800
1962	68.8	57.1	91.1	67.9	65.3	85.3	4,800
1963	67.5	55.5	90.0	66.3	63.4	85.3	4,800
1964	65.5	53.1	88.5	63.8	60.5	84.4	4,800
1965	63.9	51.0	87.3	59.5	55.8	82.5	4,800
1966	75.8	64.4	95.6	68.3	65.0	88.4	6,600
1967	73.6	61.5	94.2	66.7	63.2	87.5	6,600
1968	78.6	68.0	96.3	70.3	67.2	89.7	7,800
1969	75.5	62.8	96.0	68.3	65.0	89.1	7,800
1970	74.0	61.8	93.5	67.8	64.3	88.3	7,800
1971	71.7	59.1	91.7	66.7	63.3	86.2	7,800
1972	75.0	62.9	93.9	68.8	65.0	89.7	9,000
1973	79.7	68.9	96.2	71.1	67.4	91.0	10,800
1974	84.9	76.2	97.8	75.7	72.1	94.0	13,200
1975	84.9	76.4	97.5	77.8	74.4	93.9	14,100
1976	85.1	76.3	97.5	78.6	75.1	94.3	15,300
1977	85.2	76.3	97.5	79.3	75.8	94.1	16,500
1978	84.6	75.4	97.1	79.3	75.6	94.0	17,700
1979	90.0	83.6	98.6	84.3	81.3	95.9	22,900
1980	91.2	85.5	98.8	86.9	84.2	96.6	25,900
1981	92.4	87.4	99.0	89.4	87.1	97.2	29,700
1982	92.9	88.3	98.9	91.0	88.8	97.7	32,400
1983	93.7	89.6	99.0	92.0	90.0	97.7	35,700
1984	93.6	89.4	98.9	91.8	89.7	97.6	37,800
1985	93.5	89.3	98.8	92.0	89.8	97.5	39,600
1986	93.8	89.7	98.7	92.3	90.2	97.5	42,000
1987	93.9	89.9	98.6	92.5	90.4	97.5	43,800
1988	93.5	89.4	98.3	91.7	89.4	97.1	45,000
1989	93.8	90.1	98.3	92.4	90.1	97.3	48,000
1990	94.3	90.9	98.4	93.3	91.3	97.7	51,300
1991	94.4	91.1	98.3	93.6	91.6	97.7	53,400
1992	94.3	91.0	98.1	93.6	91.7	97.6	55,500
1993	94.4	91.3	98.1	93.7	91.9	97.4	57,600
1994	94.6	91.4	98.1	93.9	92.0	97.5	60,600
1995	94.2	91.0	97.9	93.9	92.0	97.5	61,200
1996	93.9	90.6	97.7	93.9	92.0	97.4	62,700
1997	93.8	90.5	97.6	93.8	91.9	97.3	65,400
1998	93.7	90.3	97.5	94.0	92.2	97.3	68,400
1999 ^b	93.9	90.7	97.5	94.2	92.3	97.4	72,600
2000 ^b	93.8	90.6	97.4	94.2	92.3	97.3	76,200
2001 ^b	94.1	91.0	97.5	94.6	92.7	97.5	80,400

a. For 1937–1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.

b. Preliminary data.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2001
(in thousands)**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–999	1,000–4,999	5,000–9,999	10,000–14,999	15,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–80,399	
All wage and salary workers													
1992	126,000	9,357	19,519	17,496	15,765	14,047	20,699	12,554	7,084	2,422	...	...	7,057
1993	128,100	9,655	19,395	17,521	15,808	14,092	21,134	12,786	7,371	3,325	...	...	7,013
1994	130,100	9,591	19,403	17,273	15,709	14,194	21,482	13,230	7,709	4,310	277	...	6,921
1995	132,800	9,213	19,355	17,213	15,766	14,376	22,097	13,853	8,171	4,662	498	...	7,597
1996	135,100	9,161	19,195	16,977	15,579	14,253	22,612	14,435	8,706	5,052	1,053	...	8,077
1997	137,765	8,743	18,811	16,853	15,446	14,230	23,076	15,243	9,330	5,523	2,106	...	8,405
1998	140,386	8,427	18,402	16,431	15,235	14,125	23,586	16,095	10,062	6,008	3,268	...	8,747
1999 ^a	142,653	8,284	18,184	16,247	14,853	14,063	23,836	16,761	10,548	6,457	3,976	856	8,589
2000 ^a	144,667	8,235	17,876	15,825	14,256	13,816	24,020	17,201	11,225	6,991	4,396	1,978	8,848
2001 ^a	144,803	8,242	17,616	15,437	13,831	13,382	23,556	17,360	11,597	7,356	4,661	3,275	8,490
Men													
1992	66,543	4,171	8,743	7,726	7,186	6,587	11,128	8,069	5,109	1,868	...	...	5,955
1993	67,673	4,429	8,665	7,740	7,223	6,652	11,270	8,074	5,224	2,527	...	...	5,869
1994	68,481	4,350	8,548	7,546	7,118	6,718	11,360	8,211	5,372	3,243	222	...	5,794
1995	69,901	4,256	8,510	7,457	7,051	6,814	11,653	8,448	5,587	3,444	388	...	6,292
1996	70,670	4,177	8,333	7,261	6,854	6,637	11,791	8,667	5,838	3,672	800	...	6,641
1997	71,910	4,040	8,158	7,154	6,714	6,485	11,864	8,957	6,162	3,932	1,582	...	6,862
1998	73,111	3,900	7,964	6,936	6,533	6,335	11,947	9,297	6,520	4,199	2,406	...	7,074
1999 ^a	74,207	3,851	7,886	6,883	6,305	6,247	11,894	9,538	6,695	4,447	2,891	641	6,928
2000 ^a	75,132	3,847	7,772	6,712	6,008	6,055	11,781	9,618	6,984	4,676	3,132	1,461	7,086
2001 ^a	75,218	3,904	7,792	6,629	5,863	5,862	11,384	9,567	7,040	4,828	3,214	2,381	6,753
Women													
1992	59,457	5,186	10,776	9,770	8,579	7,460	9,571	4,485	1,975	554	...	...	1,103
1993	60,427	5,226	10,730	9,781	8,586	7,440	9,864	4,712	2,147	798	...	...	1,144
1994	61,619	5,241	10,856	9,726	8,592	7,476	10,122	5,020	2,337	1,067	55	...	1,127
1995	62,900	4,957	10,845	9,756	8,714	7,563	10,444	5,405	2,584	1,217	110	...	1,305
1996	64,429	4,985	10,862	9,716	8,725	7,616	10,819	5,768	2,868	1,380	253	...	1,437
1997	65,855	4,703	10,653	9,698	8,732	7,745	11,212	6,285	3,169	1,591	524	...	1,543
1998	67,275	4,527	10,438	9,495	8,702	7,790	11,640	6,798	3,541	1,808	862	...	1,673
1999 ^a	68,446	4,433	10,298	9,364	8,548	7,816	11,942	7,223	3,853	2,010	1,085	215	1,661
2000 ^a	69,535	4,387	10,103	9,113	8,248	7,761	12,239	7,584	4,242	2,314	1,264	517	1,763
2001 ^a	69,585	4,338	9,824	8,807	7,967	7,520	12,172	7,793	4,556	2,529	1,447	895	1,736

a. Preliminary data.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2001 (in thousands)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
All self-employed workers															
1951	4,190	6	71	246	414	543	592	565	503	462	164	215	237	55	117
1955	6,810	18	114	362	600	757	865	874	790	737	290	441	497	143	322
1960	6,870	19	133	305	560	743	848	929	918	846	316	452	414	101	286
1965	6,550	31	143	292	452	664	814	870	913	885	328	411	388	92	267
1970	6,270	33	159	348	476	581	729	808	837	839	327	407	388	94	244
1975	7,000	67	302	581	679	700	731	813	869	823	317	382	393	95	248
1980	8,200	78	380	824	1,052	983	869	812	851	852	307	381	419	112	280
1985	10,600	112	527	1,099	1,488	1,522	1,261	1,030	930	929	368	434	455	124	321
1990	12,500	152	529	1,123	1,663	1,854	1,736	1,377	1,113	980	381	487	567	150	389
1991	12,800	136	521	1,105	1,697	1,897	1,818	1,474	1,170	998	388	486	561	158	391
1992	13,100	137	509	1,093	1,678	1,951	1,864	1,589	1,243	1,018	382	484	576	166	410
1993	13,200	131	488	1,029	1,650	1,956	1,892	1,647	1,325	1,047	375	481	589	164	426
1994	13,300	140	473	989	1,624	1,936	1,945	1,726	1,357	1,070	375	482	580	164	437
1995	13,500	143	482	1,005	1,612	1,960	1,964	1,808	1,393	1,097	385	467	574	166	445
1996	13,900	147	490	1,036	1,614	2,013	2,035	1,873	1,471	1,144	404	475	575	164	458
1997	14,020	151	498	1,030	1,548	1,978	2,053	1,874	1,555	1,203	402	485	592	169	483
1998	14,230	162	510	1,045	1,524	1,963	2,092	1,885	1,616	1,265	415	493	590	178	492
1999 ^a	14,550	172	536	1,042	1,522	1,967	2,089	1,974	1,693	1,327	421	518	599	175	513
2000 ^a	14,800	178	563	1,025	1,497	1,941	2,084	2,017	1,806	1,358	452	536	611	188	543
2001 ^a	14,950	179	589	1,021	1,494	1,874	2,081	2,040	1,836	1,442	466	547	639	187	555
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	9,074	94	306	658	1,021	1,281	1,322	1,200	954	754	276	328	415	119	346
1997	9,078	98	311	638	975	1,245	1,313	1,197	997	788	275	334	420	122	365
1998	9,109	98	314	641	947	1,217	1,326	1,188	1,033	819	275	338	415	130	368
1999 ^a	9,240	107	318	630	942	1,207	1,314	1,243	1,068	847	279	355	418	128	384
2000 ^a	9,265	108	330	602	898	1,174	1,286	1,256	1,136	858	297	356	427	136	403
2001 ^a	9,228	106	332	590	868	1,117	1,273	1,262	1,139	895	302	359	443	136	406
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	4,826	54	183	377	594	733	713	673	517	390	128	147	160	45	112
1997	4,942	54	188	392	572	733	739	676	558	415	128	151	172	47	118
1998	5,121	65	196	404	577	746	767	697	583	445	140	155	175	48	124
1999 ^a	5,310	65	218	412	580	760	775	732	625	480	142	163	181	47	129
2000 ^a	5,534	70	233	424	599	767	798	761	670	500	155	180	184	52	140
2001 ^a	5,721	73	257	431	626	756	807	778	697	547	164	187	196	51	149

a. Preliminary data.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: Age refers to age attained during year.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

**Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2001
(in thousands)**

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–999	1,000–4,999	5,000–9,999	10,000–14,999	15,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–80,399	
All self-employed workers													
1992	13,100	593	2,927	2,519	1,599	1,156	1,576	971	612	308	...	...	839
1993	13,200	587	2,866	2,562	1,627	1,149	1,570	990	633	388	...	...	828
1994	13,300	551	2,825	2,510	1,670	1,162	1,586	1,019	645	426	92	...	814
1995	13,500	535	2,781	2,593	1,690	1,192	1,604	1,044	678	444	116	...	822
1996	13,900	521	2,791	2,667	1,754	1,210	1,650	1,092	713	471	176	...	853
1997	14,020	522	2,716	2,674	1,740	1,226	1,669	1,100	737	489	278	...	869
1998	14,230	510	2,643	2,675	1,769	1,242	1,717	1,157	777	505	387	...	848
1999 ^a	14,550	487	2,586	2,695	1,800	1,281	1,760	1,197	807	538	386	163	850
2000 ^a	14,800	520	2,568	2,690	1,813	1,269	1,766	1,215	833	577	412	278	860
2001 ^a	14,950	531	2,599	2,688	1,857	1,279	1,732	1,195	841	596	408	411	813
Men													
1992	8,798	288	1,603	1,606	1,109	827	1,145	746	485	253	...	...	734
1993	8,840	291	1,559	1,632	1,118	809	1,141	760	500	316	...	...	715
1994	8,839	268	1,511	1,552	1,138	820	1,153	772	503	340	77	...	705
1995	8,908	256	1,492	1,581	1,138	826	1,152	782	521	356	96	...	708
1996	9,074	247	1,468	1,598	1,166	831	1,176	807	545	367	141	...	729
1997	9,078	255	1,429	1,550	1,138	842	1,171	796	559	381	223	...	735
1998	9,109	247	1,378	1,518	1,128	827	1,189	831	584	389	309	...	710
1999 ^a	9,240	234	1,341	1,499	1,126	845	1,201	851	593	411	299	129	710
2000 ^a	9,265	244	1,326	1,463	1,116	820	1,179	845	600	425	314	218	713
2001 ^a	9,228	252	1,322	1,445	1,097	823	1,142	813	599	431	312	324	670
Women													
1992	4,302	305	1,323	913	490	329	431	225	127	55	...	...	105
1993	4,360	296	1,308	930	509	340	429	230	133	73	...	...	113
1994	4,460	282	1,314	957	531	342	435	246	142	85	15	...	109
1995	4,592	280	1,289	1,012	552	366	452	261	157	88	20	...	114
1996	4,826	274	1,323	1,069	588	379	475	285	168	104	35	...	125
1997	4,942	267	1,287	1,125	601	384	499	303	178	108	55	...	134
1998	5,121	264	1,265	1,157	641	415	528	327	193	116	78	...	138
1999 ^a	5,310	253	1,245	1,196	674	436	559	346	214	127	87	34	139
2000 ^a	5,534	275	1,241	1,227	696	449	587	370	233	152	98	60	147
2001 ^a	5,721	279	1,278	1,244	760	456	590	382	243	165	96	87	143

a. Preliminary data.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Taxable earnings consist of self-employment income and taxable wages. See Table 2.A3.

... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B10a—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2000

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			OASDI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	153,517	144,667	14,800	3,987,100	3,778,900	208,200	494,400	468,584	25,817
Alabama	2,295	2,175	203	52,074	49,609	2,465	6,457	6,152	306
Alaska	348	325	40	8,757	8,177	580	1,086	1,014	72
Arizona	2,614	2,484	224	65,759	62,648	3,112	8,154	7,768	386
Arkansas	1,400	1,309	146	28,562	26,917	1,646	3,542	3,338	204
California	16,552	15,264	1,960	467,578	433,914	33,664	57,980	53,805	4,174
Colorado	2,432	2,270	279	65,475	61,299	4,176	8,119	7,601	518
Connecticut	1,951	1,829	199	60,675	57,075	3,599	7,524	7,077	446
Delaware	482	466	32	13,298	12,883	415	1,649	1,598	51
District of Columbia	365	348	28	10,964	10,411	552	1,360	1,291	68
Florida	8,383	7,877	852	197,146	187,469	9,677	24,446	23,246	1,200
Georgia	4,518	4,286	398	115,373	110,196	5,177	14,306	13,664	642
Hawaii	645	606	63	16,364	15,550	814	2,029	1,928	101
Idaho	703	659	77	15,148	14,279	869	1,878	1,771	108
Illinois	6,914	6,562	607	187,862	179,456	8,406	23,295	22,253	1,042
Indiana	3,466	3,312	291	87,772	84,035	3,737	10,884	10,420	463
Iowa	1,711	1,598	200	39,450	36,977	2,472	4,892	4,585	307
Kansas	1,560	1,471	160	38,143	36,034	2,109	4,730	4,468	261
Kentucky	2,139	2,010	229	47,972	45,578	2,394	5,948	5,652	297
Louisiana	2,092	1,966	204	45,401	42,763	2,638	5,630	5,303	327
Maine	715	657	94	15,839	14,659	1,180	1,964	1,818	146
Maryland	3,021	2,877	257	90,688	86,727	3,961	11,245	10,754	491
Massachusetts	3,488	3,255	371	104,002	97,778	6,224	12,896	12,125	772
Michigan	5,672	5,431	436	155,986	150,376	5,610	19,342	18,647	696
Minnesota	3,032	2,869	300	83,261	79,136	4,125	10,324	9,813	512
Mississippi	1,424	1,348	126	29,349	27,752	1,597	3,639	3,441	198
Missouri	3,115	2,942	302	73,296	69,711	3,585	9,089	8,644	445
Montana	498	452	74	9,872	8,925	947	1,224	1,107	117
Nebraska	1,014	951	113	23,339	21,972	1,367	2,894	2,725	169
Nevada	1,067	1,022	79	25,694	24,559	1,134	3,186	3,045	141
New Hampshire	768	720	80	21,687	20,475	1,213	2,689	2,539	150
New Jersey	4,731	4,502	392	152,946	146,343	6,603	18,965	18,146	819
New Mexico	896	836	91	19,376	18,340	1,036	2,403	2,274	128
New York	9,987	9,406	966	288,573	274,866	13,707	35,783	34,083	1,700
North Carolina	4,587	4,342	422	112,700	107,170	5,530	13,975	13,289	686
North Dakota	368	337	52	7,680	6,965	715	952	864	89
Ohio	6,137	5,802	550	149,867	142,762	7,104	18,583	17,703	881
Oklahoma	1,820	1,700	198	39,425	37,303	2,122	4,889	4,626	263
Oregon	1,912	1,793	191	48,322	45,542	2,781	5,992	5,647	345
Pennsylvania	6,676	6,339	562	176,677	168,196	8,481	21,908	20,856	1,052
Rhode Island	599	570	54	15,846	15,111	735	1,965	1,874	91
South Carolina	2,184	2,076	182	50,610	48,352	2,258	6,276	5,996	280
South Dakota	453	418	61	9,211	8,457	754	1,142	1,049	93
Tennessee	3,180	2,993	324	75,111	70,673	4,438	9,314	8,763	550
Texas	10,455	9,772	1,106	261,419	246,198	15,221	32,416	30,529	1,887
Utah	1,201	1,153	98	27,502	26,380	1,122	3,410	3,271	139
Vermont	370	344	46	8,727	8,156	571	1,082	1,011	71
Virginia	4,057	3,868	333	113,986	109,251	4,735	14,134	13,547	587
Washington	3,315	3,144	297	92,427	87,683	4,745	11,461	10,873	588
West Virginia	861	814	81	18,802	17,808	994	2,331	2,208	123
Wisconsin	3,232	3,087	261	83,299	79,807	3,492	10,329	9,896	433
Wyoming	289	269	34	6,303	5,914	388	782	733	48
Outlying area									
Puerto Rico	1,220	1,161	66	18,296	17,179	1,116	2,269	2,130	138
Other and unknown ^e	605	599	9	13,210	13,102	108	1,638	1,625	13

- a. State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.
- b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- c. Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$76,200 in 2000.
- d. For 2000 earnings, paid at the rate of 6.2 percent of taxable wages by both employees and employers, 6.2 percent of taxable tips by employees, and 12.4 percent of self-employment income by self-employed workers. Data are unadjusted for multi-employer tax refunds.
- e. Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B10b—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2001

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			OASDI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	153,743	144,803	14,950	4,142,573	3,928,000	214,573	513,679	487,072	26,607
Alabama	2,273	2,155	208	53,251	50,778	2,473	6,603	6,296	307
Alaska	358	335	41	9,530	8,981	549	1,182	1,114	68
Arizona	2,651	2,523	225	69,130	66,019	3,111	8,572	8,186	386
Arkansas	1,396	1,310	144	29,635	28,005	1,630	3,675	3,473	202
California	16,693	15,371	2,003	491,702	456,544	35,158	60,971	56,611	4,360
Colorado	2,448	2,279	280	68,858	64,601	4,256	8,538	8,011	528
Connecticut	1,944	1,816	208	63,077	59,140	3,937	7,822	7,333	488
Delaware	486	467	34	14,096	13,627	469	1,748	1,690	58
District of Columbia	360	345	28	11,585	11,009	576	1,437	1,365	71
Florida	8,481	7,962	878	207,188	197,110	10,078	25,691	24,442	1,250
Georgia	4,500	4,260	402	119,504	114,214	5,290	14,819	14,163	656
Hawaii	670	633	60	17,626	16,791	835	2,186	2,082	104
Idaho	716	674	74	16,338	15,468	870	2,026	1,918	108
Illinois	6,704	6,354	612	190,760	181,945	8,815	23,654	22,561	1,093
Indiana	3,483	3,328	294	89,041	85,240	3,801	11,041	10,570	471
Iowa	1,701	1,594	196	40,484	38,147	2,338	5,020	4,730	290
Kansas	1,560	1,477	156	39,790	37,752	2,038	4,934	4,681	253
Kentucky	2,135	2,007	221	49,212	46,803	2,408	6,102	5,804	299
Louisiana	2,112	1,987	207	47,691	45,013	2,678	5,914	5,582	332
Maine	722	666	90	16,600	15,334	1,266	2,058	1,901	157
Maryland	3,083	2,937	259	96,754	92,624	4,130	11,998	11,485	512
Massachusetts	3,492	3,257	374	109,469	103,075	6,394	13,574	12,781	793
Michigan	5,581	5,337	435	156,291	150,589	5,702	19,380	18,673	707
Minnesota	3,044	2,880	301	86,308	82,133	4,175	10,702	10,185	518
Mississippi	1,396	1,321	128	29,780	28,168	1,613	3,693	3,493	200
Missouri	3,110	2,933	299	75,902	72,321	3,581	9,412	8,968	444
Montana	505	463	70	10,286	9,376	910	1,275	1,163	113
Nebraska	1,020	956	115	24,054	22,736	1,318	2,983	2,819	163
Nevada	1,104	1,055	81	27,413	26,166	1,247	3,399	3,245	155
New Hampshire	774	725	80	22,735	21,404	1,331	2,819	2,654	165
New Jersey	4,737	4,498	396	159,300	152,248	7,052	19,753	18,879	874
New Mexico	910	855	91	20,678	19,644	1,034	2,564	2,436	128
New York	10,002	9,396	1,006	299,680	285,121	14,559	37,160	35,355	1,805
North Carolina	4,525	4,268	430	114,721	109,048	5,673	14,225	13,522	704
North Dakota	370	340	54	8,061	7,385	675	1,000	916	84
Ohio	6,045	5,706	544	150,994	143,777	7,218	18,723	17,828	895
Oklahoma	1,842	1,723	198	41,473	39,299	2,175	5,143	4,873	270
Oregon	1,910	1,795	190	49,682	46,922	2,760	6,161	5,818	342
Pennsylvania	6,749	6,416	564	184,520	175,828	8,692	22,881	21,803	1,078
Rhode Island	599	571	55	16,702	15,921	780	2,071	1,974	97
South Carolina	2,174	2,069	180	52,275	50,043	2,232	6,482	6,205	277
South Dakota	454	423	59	9,478	8,762	716	1,175	1,086	89
Tennessee	3,132	2,945	322	76,111	71,486	4,625	9,438	8,864	573
Texas	10,592	9,898	1,134	275,306	259,420	15,886	34,138	32,168	1,970
Utah	1,211	1,166	96	28,868	27,754	1,113	3,580	3,442	138
Vermont	372	348	46	9,102	8,515	587	1,129	1,056	73
Virginia	4,103	3,905	344	120,440	115,429	5,011	14,935	14,313	621
Washington	3,320	3,147	289	95,792	91,188	4,603	11,878	11,307	571
West Virginia	872	828	79	19,685	18,671	1,014	2,441	2,315	126
Wisconsin	3,225	3,081	264	85,671	82,125	3,546	10,623	10,183	440
Wyoming	300	281	34	6,926	6,488	439	859	804	54
Outlying area									
Puerto Rico	1,194	1,135	65	19,142	18,021	1,121	2,374	2,235	139
Other and unknown ^e	605	600	8	13,879	13,794	85	1,721	1,710	11

a. State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.

b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.

c. Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$80,400 in 2001.

d. For 2001 earnings, paid at the rate of 6.2 percent of taxable wages by both employees and employers, 6.2 percent of taxable tips by employees, and 12.4 percent of self-employment income by self-employed workers. Data are unadjusted for multi-employer tax refunds.

e. Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B11—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by type of earnings, selected years 1937–2002

Year	Number ^a (thousands)			Taxable earnings ^b (millions of dollars)			OASDI contributions ^{c,d} (millions of dollars)		
	Total	Wage and salary	Self- employed	Total	Wage and salary	Self- employed	Total	Wage and salary	Self- employed
1937	32,900	32,900	...	29,620	29,620	...	592	592	...
1940	35,390	35,390	...	32,970	32,970	...	659	659	...
1945	46,390	46,390	...	62,950	62,950	...	1,259	1,259	...
1950	48,280	48,280	...	87,500	87,500	...	2,625	2,625	...
1951	58,120	54,630	4,190	120,770	111,250	9,520	3,552	3,338	214
1952	59,580	56,060	4,240	128,640	118,880	9,760	3,786	3,566	220
1953	60,840	57,220	4,340	135,870	125,840	10,030	4,001	3,775	226
1954	59,610	55,940	4,350	133,520	123,410	10,110	5,240	4,936	303
1955	65,200	59,560	6,810	157,540	141,810	15,730	6,144	5,672	472
1956	67,610	61,560	7,390	170,720	153,010	17,710	6,652	6,120	531
1957	70,590	64,730	7,150	181,380	163,990	17,390	7,966	7,380	587
1958	69,770	64,040	7,130	180,720	163,140	17,580	7,935	7,341	593
1959	71,700	66,000	7,060	202,310	183,620	18,690	9,882	9,181	701
1960	72,530	66,980	6,870	207,000	188,580	18,420	12,144	11,315	829
1961	72,820	67,360	6,790	209,640	190,850	18,790	12,297	11,451	846
1962	74,280	68,890	6,720	219,050	200,130	18,920	13,397	12,508	889
1963	75,540	70,310	6,590	225,550	206,840	18,710	16,006	14,996	1,010
1964	77,430	72,230	6,480	236,390	217,430	18,960	16,788	15,764	1,024
1965	80,680	75,430	6,550	250,730	230,830	19,900	17,810	16,735	1,075
1966	84,600	79,460	6,630	312,540	287,860	24,680	23,597	22,165	1,431
1967	87,040	82,020	6,470	329,960	305,670	24,290	25,275	23,842	1,433
1968	89,380	84,470	6,570	375,800	348,500	27,300	28,069	26,486	1,583
1969	92,060	87,200	6,350	402,510	375,010	27,500	33,233	31,501	1,733
1970	93,090	88,180	6,270	415,580	388,680	26,900	34,344	32,649	1,695
1971	93,340	88,460	6,290	426,950	399,550	27,400	38,649	36,759	1,891
1972	96,240	91,220	6,600	484,150	452,050	32,100	43,804	41,589	2,215
1973	99,830	94,610	7,100	561,850	523,450	38,400	53,463	50,775	2,688
1974	101,330	96,190	7,040	636,800	594,400	42,400	61,814	58,846	2,968
1975	100,200	94,900	7,000	664,700	621,100	43,600	64,541	61,489	3,052
1976	102,600	97,230	7,400	737,700	689,200	48,500	71,626	68,231	3,395
1977	105,800	100,450	7,480	816,600	763,600	53,000	79,306	75,596	3,710
1978	110,600	104,810	8,040	915,600	856,100	59,500	90,691	86,466	4,225
1979	112,700	106,900	8,200	1,067,000	997,500	69,500	106,246	101,346	4,900
1980	113,000	107,200	8,200	1,180,700	1,109,000	71,700	117,729	112,674	5,055
1981	113,000	107,300	8,250	1,294,100	1,220,000	74,100	136,468	130,540	5,928
1982	111,800	105,800	8,550	1,365,300	1,290,000	75,300	145,382	139,320	6,062
1983	112,100	105,900	9,200	1,454,100	1,369,000	85,100	154,703	147,852	6,851
1984	116,300	109,900	9,900	1,608,800	1,515,000	93,800	183,403	172,710	10,693
1985	119,800	113,400	10,600	1,722,600	1,621,000	101,600	196,376	184,794	11,582
1986	122,900	115,900	11,200	1,844,400	1,730,800	113,600	210,262	197,311	12,950
1987	125,600	118,200	12,000	1,960,000	1,835,100	124,900	223,440	209,201	14,239
1988	129,600	122,100	12,400	2,088,400	1,952,000	136,400	253,114	236,582	16,532
1989	131,700	123,900	12,900	2,239,500	2,096,000	143,500	271,427	254,035	17,392
1990	133,600	126,100	12,500	2,358,000	2,222,000	136,000	292,392	275,528	16,864
1991	133,000	125,200	12,800	2,422,500	2,283,000	139,500	300,390	283,092	17,298
1992	134,000	126,000	13,100	2,532,900	2,386,000	146,900	314,080	295,864	18,216
1993	136,100	128,100	13,200	2,636,100	2,483,400	152,700	326,876	307,942	18,935
1994	138,200	130,100	13,300	2,785,200	2,624,500	160,700	345,365	325,438	19,927
1995	141,000	132,800	13,500	2,919,100	2,754,300	164,800	361,968	341,533	20,435
1996	143,400	135,100	13,900	3,073,500	2,901,700	171,800	381,114	359,811	21,303
1997	146,145	137,765	14,020	3,285,000	3,104,300	180,700	407,340	384,933	22,407
1998	148,786	140,386	14,230	3,524,900	3,333,700	191,200	437,088	413,379	23,709
1999 ^e	151,293	142,653	14,550	3,749,700	3,548,100	201,600	464,963	439,964	24,998
2000 ^e	153,517	144,667	14,800	3,987,100	3,778,900	208,200	494,400	468,584	25,817
2001 ^f	153,743	144,803	14,950	4,142,573	3,928,000	214,573	513,679	487,072	26,607
2002 ^g	152,795	144,034	14,619	4,227,023	4,002,759	224,264	524,151	496,342	27,809

a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.

b. See Table 2.A3 for annual maximum taxable earnings.

c. See Table 2.A3 for contribution rates.

d. Unadjusted for multi-employer tax refunds. Unadjusted for tax credits. See Table 2.A5 for information on tax credits.

e. Preliminary data.

f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.

g. Preliminary estimates based on data from Bureau of Labor Statistics and Bureau of Economic Analysis.

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B12a—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2000

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			HI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	157,033	148,320	15,535	4,962,900	4,638,800	324,100	143,924	134,525	9,399
Alabama	2,319	2,200	211	58,740	55,468	3,272	1,703	1,609	95
Alaska	369	347	42	10,832	10,092	740	314	293	21
Arizona	2,634	2,504	238	77,288	73,101	4,187	2,241	2,120	121
Arkansas	1,412	1,321	149	31,218	29,350	1,868	905	851	54
California	17,282	16,029	2,071	642,437	586,797	55,640	18,631	17,017	1,614
Colorado	2,567	2,413	291	87,455	81,109	6,347	2,536	2,352	184
Connecticut	1,987	1,867	215	91,757	83,543	8,215	2,661	2,423	238
Delaware	486	469	34	15,503	14,867	636	450	431	18
District of Columbia	377	361	30	15,310	13,789	1,521	444	400	44
Florida	8,471	7,967	886	236,894	223,846	13,048	6,870	6,492	378
Georgia	4,613	4,382	417	142,500	134,432	8,068	4,132	3,899	234
Hawaii	665	627	65	18,527	17,567	960	537	509	28
Idaho	709	665	79	16,347	15,353	994	474	445	29
Illinois	7,088	6,744	639	239,155	224,799	14,356	6,935	6,519	416
Indiana	3,495	3,341	302	97,852	92,486	5,366	2,838	2,682	156
Iowa	1,724	1,611	205	43,516	40,467	3,049	1,262	1,174	88
Kansas	1,573	1,485	166	44,970	41,982	2,988	1,304	1,217	87
Kentucky	2,184	2,058	236	54,852	51,467	3,384	1,591	1,493	98
Louisiana	2,241	2,121	210	55,844	51,822	4,022	1,619	1,503	117
Maine	742	687	96	18,216	16,865	1,351	528	489	39
Maryland	3,092	2,949	276	110,919	103,988	6,930	3,217	3,016	201
Massachusetts	3,687	3,467	399	149,108	136,607	12,501	4,324	3,962	363
Michigan	5,718	5,476	465	181,024	173,216	7,808	5,250	5,023	226
Minnesota	3,056	2,893	316	97,286	92,067	5,219	2,821	2,670	151
Mississippi	1,435	1,359	130	31,576	29,523	2,053	916	856	60
Missouri	3,184	3,012	314	86,663	81,123	5,539	2,513	2,353	161
Montana	503	458	75	10,896	9,578	1,319	316	278	38
Nebraska	1,023	960	118	26,228	24,461	1,766	761	709	51
Nevada	1,119	1,076	83	32,800	30,211	2,588	951	876	75
New Hampshire	778	730	84	26,490	24,846	1,644	768	721	48
New Jersey	4,769	4,541	430	210,311	198,714	11,597	6,099	5,763	336
New Mexico	910	850	94	21,343	20,089	1,254	619	583	36
New York	10,059	9,477	1,029	393,132	365,074	28,058	11,401	10,587	814
North Carolina	4,616	4,371	438	129,595	121,994	7,602	3,758	3,538	220
North Dakota	371	340	53	8,441	7,645	796	245	222	23
Ohio	6,541	6,231	577	184,518	174,733	9,785	5,351	5,067	284
Oklahoma	1,843	1,725	204	43,554	41,167	2,387	1,263	1,194	69
Oregon	1,929	1,811	197	55,920	52,356	3,564	1,622	1,518	103
Pennsylvania	6,736	6,399	596	208,745	196,731	12,014	6,054	5,705	348
Rhode Island	608	579	57	18,631	17,490	1,141	540	507	33
South Carolina	2,197	2,088	187	56,081	53,038	3,043	1,626	1,538	88
South Dakota	457	423	61	10,006	9,122	884	290	265	26
Tennessee	3,208	3,022	338	86,497	80,144	6,353	2,508	2,324	184
Texas	10,917	10,255	1,154	336,113	312,555	23,558	9,747	9,064	683
Utah	1,213	1,164	102	30,672	29,056	1,616	889	843	47
Vermont	372	347	47	9,568	8,842	726	277	256	21
Virginia	4,105	3,915	354	137,128	129,668	7,460	3,977	3,760	216
Washington	3,351	3,180	311	113,483	107,035	6,449	3,291	3,104	187
West Virginia	871	824	83	20,631	19,126	1,505	598	555	44
Wisconsin	3,252	3,107	271	93,003	88,318	4,685	2,697	2,561	136
Wyoming	292	273	35	7,564	6,874	690	219	199	20
Outlying area									
Puerto Rico	1,256	1,198	65	20,215	18,827	1,389	586	546	40
Other and unknown ^e	626	620	9	15,544	15,380	164	451	446	5

a. State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.

b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.

c. No annual maximum taxable earnings amount for Medicare.

d. For 2000 earnings, paid at the rate of 1.45 percent of taxable wages by both employees and employers, 1.45 percent of taxable tips by employees, and 2.9 percent of self-employment income by self-employed workers.

e. Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B HI: Covered Workers

Table 4.B12b—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2001

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			HI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	157,365	148,566	15,655	5,063,500	4,735,600	327,900	146,842	137,332	9,509
Alabama	2,295	2,177	214	59,654	56,145	3,509	1,730	1,628	102
Alaska	382	360	41	11,654	10,957	697	338	318	20
Arizona	2,669	2,541	237	78,272	74,101	4,171	2,270	2,149	121
Arkansas	1,407	1,321	148	32,536	30,588	1,947	944	887	56
California	17,470	16,183	2,103	647,843	594,001	53,842	18,787	17,226	1,561
Colorado	2,586	2,427	292	85,846	79,605	6,241	2,490	2,309	181
Connecticut	1,982	1,856	225	90,477	82,449	8,027	2,624	2,391	233
Delaware	489	470	35	16,133	15,373	760	468	446	22
District of Columbia	373	357	30	16,240	14,873	1,367	471	431	40
Florida	8,566	8,048	913	242,796	229,129	13,666	7,041	6,645	396
Georgia	4,604	4,367	421	147,522	139,185	8,337	4,278	4,036	242
Hawaii	692	656	62	20,060	18,964	1,097	582	550	32
Idaho	722	680	76	17,627	16,631	995	511	482	29
Illinois	6,915	6,575	645	244,325	227,815	16,510	7,085	6,607	479
Indiana	3,507	3,352	306	97,939	92,528	5,411	2,840	2,683	157
Iowa	1,711	1,604	200	44,227	41,403	2,823	1,283	1,201	82
Kansas	1,571	1,489	162	45,962	42,912	3,050	1,333	1,244	88
Kentucky	2,179	2,053	229	57,030	52,660	4,370	1,654	1,527	127
Louisiana	2,266	2,147	214	58,481	54,693	3,788	1,696	1,586	110
Maine	751	696	92	18,993	17,569	1,424	551	510	41
Maryland	3,153	3,009	275	117,172	108,758	8,414	3,398	3,154	244
Massachusetts	3,702	3,481	400	148,782	137,700	11,082	4,315	3,993	321
Michigan	5,619	5,375	461	178,001	170,229	7,773	5,162	4,937	225
Minnesota	3,067	2,902	315	99,632	94,375	5,257	2,889	2,737	152
Mississippi	1,407	1,332	131	31,769	29,734	2,035	921	862	59
Missouri	3,179	3,003	310	88,168	83,086	5,082	2,557	2,409	147
Montana	510	468	71	11,202	10,101	1,101	325	293	32
Nebraska	1,027	963	118	26,597	24,901	1,697	771	722	49
Nevada	1,161	1,115	85	33,855	31,853	2,002	982	924	58
New Hampshire	783	734	84	26,946	25,205	1,740	781	731	50
New Jersey	4,772	4,533	433	207,848	194,992	12,856	6,028	5,655	373
New Mexico	923	868	93	22,563	21,375	1,188	654	620	34
New York	10,061	9,454	1,068	411,489	382,127	29,362	11,933	11,082	851
North Carolina	4,551	4,295	447	129,990	122,402	7,587	3,770	3,550	220
North Dakota	373	343	55	8,688	7,926	762	252	230	22
Ohio	6,472	6,159	571	185,742	176,094	9,648	5,387	5,107	280
Oklahoma	1,863	1,745	204	45,716	43,247	2,469	1,326	1,254	72
Oregon	1,926	1,811	196	56,967	53,439	3,528	1,652	1,550	102
Pennsylvania	6,807	6,473	595	215,319	202,650	12,669	6,244	5,877	367
Rhode Island	608	580	58	19,093	18,052	1,041	554	523	30
South Carolina	2,185	2,081	187	57,567	54,565	3,002	1,669	1,582	87
South Dakota	459	428	60	10,183	9,367	816	295	272	24
Tennessee	3,159	2,972	334	88,186	81,302	6,884	2,557	2,358	200
Texas	11,074	10,403	1,180	344,277	321,147	23,129	9,984	9,313	671
Utah	1,224	1,179	100	31,741	30,235	1,506	920	877	44
Vermont	374	349	47	10,250	9,529	721	297	276	21
Virginia	4,152	3,954	363	147,274	139,047	8,227	4,271	4,032	239
Washington	3,356	3,184	302	112,747	106,759	5,988	3,270	3,096	174
West Virginia	881	838	81	21,528	19,991	1,537	624	580	45
Wisconsin	3,241	3,097	274	94,902	90,159	4,743	2,752	2,615	138
Wyoming	303	284	36	8,030	7,462	568	233	216	16
Outlying area									
Puerto Rico	1,231	1,173	65	20,903	19,593	1,310	606	568	38
Other and unknown ^e	625	620	8	16,757	16,615	142	486	482	4

- a. State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.
- b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- c. No annual maximum taxable earnings amount for Medicare.
- d. For 2001 earnings, paid at the rate of 1.45 percent of taxable wages by both employees and employers, 1.45 percent of taxable tips by employees, and 2.9 percent of self-employment income by self-employed workers.
- e. Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.C1—Estimated number, by insured status, December 31, 1940–2003 (in millions)

Year	Workers fully insured for retirement benefits, survivor benefits, or both			Workers insured for disability benefits
	Total	Permanently insured	Not permanently insured	
1940	24.2	1.1	23.1	...
1941	25.8	1.4	24.4	...
1942	28.1	1.8	26.3	...
1943	29.9	2.3	27.6	...
1944	31.9	2.8	29.1	...
1945	33.4	3.4	30.0	...
1946	35.4	8.6	26.8	...
1947	37.3	11.6	25.7	...
1948	38.9	13.2	25.7	...
1949	40.1	14.9	25.2	...
1950	59.8	21.0	38.8	...
1951	62.8	22.9	39.9	...
1952	68.2	25.6	42.7	...
1953	71.0	27.7	43.4	...
1954	70.2	29.9	40.4	31.9
1955	70.5	32.5	38.0	35.4
1956	74.0	36.1	38.0	37.2
1957	76.1	38.3	37.9	38.4
1958	76.5	40.3	36.2	43.4
1959	76.7	42.2	34.6	46.4
1960	84.4	47.6	36.8	48.5
1961	88.5	53.3	35.3	50.5
1962	89.8	54.9	34.8	51.5
1963	91.3	56.6	34.7	52.3
1964	92.8	58.3	34.5	53.3
1965	94.8	60.2	34.6	55.0
1966	97.2	61.9	35.3	55.7
1967	99.9	63.3	36.6	56.9
1968	102.6	64.5	38.1	70.1
1969	105.6	66.1	39.5	72.4
1970	108.3	67.3	41.0	74.5
1971	110.8	68.5	42.3	76.1
1972	113.5	69.8	43.7	77.8
1973	116.8	71.3	45.6	80.4
1974	120.2	72.7	47.5	83.3
1975	123.2	74.4	48.8	85.3
1976	126.0	76.1	49.9	87.0
1977	129.0	78.1	50.9	89.3
1978	133.3	80.3	53.0	93.7
1979	137.3	83.0	54.3	98.0
1980	140.4	85.3	55.0	100.3
1981	142.9	88.0	54.9	102.6
1982	144.7	90.7	54.0	104.5
1983	146.5	94.0	52.5	105.4
1984	148.3	96.9	51.4	107.1
1985	150.9	100.1	50.8	109.6
1986	153.2	103.3	49.9	111.6
1987	155.7	107.4	48.3	113.5
1988	158.3	110.7	47.6	115.7
1989	161.3	113.6	47.8	118.1
1990	164.0	116.4	47.6	120.1
1991	166.0	118.8	47.2	121.5
1992	167.5	121.1	46.4	122.9
1993	169.2	123.6	45.6	124.4
1994	170.8	125.9	44.9	126.2
1995	173.2	128.4	44.8	128.2
1996	175.3	130.9	44.4	130.3
1997	177.8	133.8	44.0	132.4
1998	180.2	136.3	43.9	134.7
1999	182.6	138.5	44.0	136.9
2000	185.2	140.7	44.5	139.0
2001	187.8	143.1	44.7	140.7
2002	190.1	145.1	44.9	142.8
2003	192.4	147.3	45.2	145.2

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: Figures are subject to revision.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2003, selected years
(in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Insured for disability benefits</i>														
<i>Total</i>														
1970	74,504	3,860	12,432	9,858	7,257	6,743	7,399	7,817	7,250	6,486	5,401	...	...	...
1975	85,305	4,948	14,144	13,289	9,313	7,610	7,271	7,762	7,892	7,035	6,041	...	...	...
1980	100,329	6,341	17,410	16,104	12,997	9,788	8,267	7,628	7,888	7,669	6,238	...	...	...
1985	109,572	4,105	15,868	17,976	15,851	13,683	10,661	8,747	7,780	7,763	7,138	...	...	...
1990	120,081	4,541	15,023	17,954	17,691	16,099	14,339	10,991	8,759	7,569	7,116	...	...	...
1991	121,530	4,047	14,788	17,620	17,946	16,653	14,890	11,743	9,075	7,700	7,070	...	...	...
1992	122,883	3,655	14,295	17,188	18,204	17,178	15,203	12,610	9,683	7,823	7,045	...	...	...
1993	124,430	3,461	13,945	16,758	18,341	17,646	15,672	13,262	10,261	8,093	6,991	...	...	...
1994	126,205	3,514	13,639	16,433	18,358	17,957	16,234	14,029	10,724	8,310	7,009	...	...	...
1995	128,233	3,763	13,374	16,409	18,068	18,291	16,787	14,823	11,095	8,571	7,051	...	...	...
1996	130,315	4,021	13,206	16,440	17,665	18,507	17,278	15,328	11,839	8,889	7,142	...	...	...
1997	132,354	4,173	13,408	16,307	17,224	18,635	17,699	15,553	12,664	9,451	7,242	...	...	...
1998	134,654	4,439	13,712	16,151	16,840	18,717	18,082	15,964	13,288	10,000	7,462	...	...	...
1999	136,923	4,651	14,070	15,885	16,623	18,712	18,364	16,508	14,011	10,424	7,675	...	...	...
2000	138,992	4,672	14,501	15,481	16,674	18,449	18,714	17,036	14,803	10,756	7,905	...	...	...
2001	140,673	4,651	14,836	15,497	16,663	18,056	18,835	17,421	15,048	11,318	8,347	...	...	...
2002	142,813	4,588	15,213	15,581	16,692	17,717	19,006	17,909	15,477	12,010	8,620	...	...	...
2003	145,225	4,525	15,539	15,739	16,705	17,419	19,074	18,324	15,947	12,685	9,023	246	...	...
<i>Male</i>														
1970	49,847	2,550	7,622	6,519	5,331	4,956	5,191	5,218	4,722	4,224	3,512	...	...	...
1975	54,323	3,004	8,274	8,191	6,400	5,320	4,911	5,037	4,977	4,389	3,822	...	...	...
1980	60,140	3,586	9,607	9,218	8,068	6,348	5,238	4,733	4,833	4,672	3,837	...	...	...
1985	62,896	2,219	8,650	9,952	9,169	8,105	6,319	5,124	4,561	4,570	4,227	...	...	...
1990	66,898	2,424	8,039	9,749	9,909	9,157	8,070	6,175	4,941	4,319	4,116	...	...	...
1991	67,380	2,145	7,907	9,549	9,985	9,435	8,309	6,553	5,064	4,380	4,052	...	...	...
1992	67,837	1,906	7,644	9,296	10,095	9,691	8,432	6,982	5,363	4,425	4,003	...	...	...
1993	68,435	1,806	7,426	9,042	10,177	9,892	8,650	7,287	5,665	4,532	3,959	...	...	...
1994	69,150	1,829	7,263	8,824	10,156	10,028	8,944	7,651	5,878	4,632	3,946	...	...	...
1995	69,979	1,957	7,079	8,774	9,971	10,186	9,244	8,020	6,054	4,737	3,957	...	...	...
1996	70,815	2,068	6,948	8,747	9,720	10,272	9,509	8,252	6,435	4,863	4,003	...	...	...
1997	71,659	2,146	6,996	8,656	9,444	10,303	9,724	8,343	6,848	5,152	4,047	...	...	...
1998	72,611	2,279	7,117	8,516	9,186	10,342	9,892	8,549	7,149	5,444	4,138	...	...	...
1999	73,564	2,392	7,264	8,338	8,998	10,313	10,023	8,838	7,497	5,654	4,249	...	...	...
2000	74,424	2,385	7,475	8,083	8,981	10,131	10,200	9,139	7,869	5,822	4,340	...	...	...
2001	74,984	2,412	7,673	8,116	8,941	9,845	10,161	9,237	7,945	6,086	4,567	...	...	...
2002	75,946	2,378	7,884	8,151	8,942	9,636	10,217	9,475	8,145	6,429	4,689	...	...	...
2003	77,040	2,342	8,061	8,231	8,935	9,440	10,224	9,675	8,356	6,747	4,895	134	...	...
<i>Female</i>														
1970	24,656	1,310	4,810	3,339	1,926	1,787	2,208	2,599	2,527	2,262	1,889	...	...	...
1975	30,982	1,945	5,870	5,098	2,913	2,290	2,360	2,726	2,915	2,646	2,219	...	...	...
1980	40,189	2,755	7,804	6,886	4,929	3,441	3,028	2,894	3,055	2,997	2,401	...	...	...
1985	46,676	1,886	7,218	8,025	6,682	5,578	4,342	3,622	3,219	3,193	2,911	...	...	...
1990	53,183	2,116	6,984	8,206	7,782	6,942	6,269	4,816	3,818	3,250	3,000	...	...	...
1991	54,150	1,902	6,881	8,071	7,960	7,217	6,581	5,190	4,010	3,320	3,019	...	...	...
1992	55,046	1,749	6,652	7,892	8,109	7,487	6,771	5,628	4,319	3,398	3,041	...	...	...
1993	55,995	1,656	6,519	7,715	8,165	7,754	7,022	5,974	4,597	3,561	3,033	...	...	...
1994	57,055	1,685	6,376	7,609	8,202	7,929	7,289	6,378	4,845	3,678	3,063	...	...	...
1995	58,254	1,806	6,295	7,635	8,097	8,105	7,544	6,803	5,042	3,834	3,094	...	...	...
1996	59,500	1,953	6,258	7,693	7,946	8,234	7,769	7,077	5,404	4,026	3,139	...	...	...
1997	60,696	2,026	6,412	7,651	7,780	8,332	7,975	7,210	5,816	4,298	3,196	...	...	...
1998	62,043	2,161	6,595	7,635	7,654	8,376	8,190	7,415	6,139	4,555	3,324	...	...	...
1999	63,360	2,260	6,806	7,547	7,626	8,399	8,341	7,670	6,514	4,771	3,426	...	...	...
2000	64,567	2,288	7,026	7,397	7,693	8,319	8,514	7,897	6,935	4,934	3,565	...	...	...
2001	65,688	2,239	7,163	7,381	7,722	8,211	8,673	8,184	7,103	5,232	3,780	...	...	...
2002	66,867	2,211	7,329	7,430	7,750	8,081	8,789	8,434	7,332	5,581	3,931	...	...	...
2003	68,185	2,183	7,478	7,508	7,770	7,979	8,850	8,649	7,591	5,938	4,128	112	...	...

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: Figures are subject to revision.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.C OASDI: Insured Workers

Table 4.C5—Estimated size of the population in the Social Security area and percentage fully insured, by sex and age, 1999–2003 (in thousands)

Age at end of year	1999		2000		2001		2002		2003	
	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured
Total										
Total	289,645	^a 86	292,393	^a 86	295,205	^a 87	298,023	^a 87	300,801	^a 87
Under 15	62,413	^b	62,570	^b	62,747	^b	62,882	^b	62,969	^b
15–19	20,890	23	21,100	23	21,197	23	21,323	23	21,453	22
20–24	19,667	78	19,963	79	20,341	80	20,778	80	21,192	80
25–29	20,042	89	20,026	87	20,039	87	20,085	87	20,200	87
30–34	21,140	91	20,916	92	20,808	92	20,744	92	20,719	92
35–39	23,317	92	23,065	91	22,728	91	22,315	91	21,915	91
40–44	23,002	91	23,294	91	23,512	91	23,622	92	23,627	92
45–49	20,570	90	21,074	91	21,613	91	22,139	91	22,603	91
50–54	17,981	88	18,571	89	19,064	89	19,495	89	19,923	90
55–59	13,785	85	14,498	85	15,293	85	16,123	86	16,908	86
60–64	11,073	82	11,358	85	11,744	86	12,146	85	12,666	85
65–69	9,771	82	9,762	82	9,799	83	9,941	83	10,170	84
70–74	9,058	78	9,018	78	8,933	79	8,834	79	8,725	80
75 or older	16,936	74	17,178	75	17,389	75	17,595	75	17,731	76
Male										
Subtotal	142,106	^a 92	143,513	^a 92	144,940	^a 92	146,379	^a 92	147,801	^a 92
Under 15	31,956	^b	32,029	^b	32,116	^b	32,183	^b	32,225	^b
15–19	10,731	23	10,838	23	10,878	23	10,932	23	10,990	22
20–24	10,041	78	10,208	79	10,416	80	10,651	80	10,870	80
25–29	10,124	90	10,122	88	10,137	88	10,176	88	10,254	88
30–34	10,629	94	10,517	94	10,457	94	10,418	94	10,400	94
35–39	11,619	95	11,501	95	11,342	95	11,147	94	10,957	94
40–44	11,404	96	11,549	95	11,656	96	11,710	95	11,713	96
45–49	10,124	95	10,373	95	10,642	95	10,906	95	11,138	95
50–54	8,801	94	9,089	95	9,326	95	9,533	95	9,740	95
55–59	6,661	94	7,013	94	7,405	93	7,814	93	8,201	93
60–64	5,263	93	5,406	95	5,592	95	5,785	94	6,036	94
65–69	4,512	93	4,514	93	4,536	94	4,612	94	4,727	94
70–74	3,994	91	3,993	91	3,969	92	3,933	92	3,892	92
75 or older	6,245	91	6,362	91	6,468	91	6,576	91	6,656	91
Female										
Subtotal	147,539	^a 81	148,880	^a 81	150,264	^a 81	151,643	^a 82	153,000	^a 82
Under 15	30,457	^b	30,542	^b	30,631	^b	30,698	^b	30,743	^b
15–19	10,159	23	10,263	23	10,319	23	10,391	22	10,463	22
20–24	9,627	78	9,754	80	9,925	80	10,127	80	10,322	80
25–29	9,918	87	9,903	86	9,902	86	9,909	86	9,946	86
30–34	10,510	88	10,399	89	10,351	89	10,327	89	10,319	89
35–39	11,698	88	11,564	88	11,386	87	11,167	87	10,958	87
40–44	11,598	87	11,745	87	11,855	87	11,912	88	11,914	88
45–49	10,446	86	10,701	86	10,971	87	11,233	87	11,465	87
50–54	9,180	82	9,482	83	9,738	84	9,962	84	10,183	85
55–59	7,124	77	7,485	78	7,888	78	8,308	79	8,707	80
60–64	5,810	73	5,953	76	6,151	77	6,361	77	6,630	77
65–69	5,259	72	5,248	73	5,263	74	5,329	75	5,442	75
70–74	5,063	68	5,024	68	4,964	68	4,901	69	4,833	70
75 or older	10,691	65	10,816	65	10,920	66	11,018	66	11,075	66

a. Percentage of population aged 20 or older and fully insured.
b. Less than 0.5 percent.

SOURCE: U.S. Census Bureau.

NOTES: Population in the Social Security area includes residents of the 50 states and the District of Columbia adjusted for net census undercount; civilian residents of Puerto Rico, the Virgin Islands, Guam, American Samoa, and the Northern Mariana Islands; federal civilian employees and persons in the armed forces abroad and their dependents; crew members of merchant vessels; and all other U.S. citizens abroad.

Population estimates are subject to revision.

CONTACT: Felicitie Bell (410) 965-3020 or Michael Miller (410) 966-4157.

Table 5.A1—Number and average monthly benefit, by type of benefit and race, December 2002

Type of benefit	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total, OASDI ^d	46,452,550	815.00	39,417,390	841.60	4,784,360	680.40	2,098,030	628.40
OASI	39,232,330	836.90	34,275,290	858.70	3,501,850	698.80	1,348,710	647.70
Retirement benefits	32,362,130	851.40	28,672,900	867.80	2,593,670	740.30	1,020,020	676.90
Retired workers	29,203,660	895.00	25,883,360	911.70	2,370,600	774.80	882,840	733.10
Spouses of retired workers	2,681,090	451.90	2,439,880	462.00	127,590	372.30	105,910	318.90
Children of retired workers	477,380	427.70	349,660	453.10	95,480	376.60	31,270	303.10
Survivor benefits	6,870,200	768.70	5,602,390	812.10	908,180	580.10	328,690	557.20
Children of deceased workers	1,905,050	584.20	1,266,870	629.80	432,850	491.10	189,220	492.90
Widowed mothers and fathers	193,270	636.70	135,050	680.50	30,900	543.70	25,530	520.30
Nondisabled widow(er)s	4,563,660	861.40	4,046,970	882.80	402,300	688.10	102,080	691.20
Disabled widow(er)s	205,870	546.20	152,190	565.80	41,880	488.90	11,120	494.20
Parents of deceased workers	2,350	770.10	1,310	807.60	250	744.80	740	722.40
DI	7,220,210	696.00	5,142,100	727.70	1,282,510	630.10	749,320	593.60
Disabled workers	5,535,860	834.10	4,016,610	860.30	944,570	775.40	539,060	745.30
Spouses of disabled workers	151,260	211.60	113,860	221.90	18,660	191.80	18,080	169.20
Children of disabled workers	1,533,090	245.00	1,011,630	258.10	319,280	225.70	192,180	207.80

a. Includes 152,770 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

d. Includes special age-72 beneficiaries.

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2002

Age	All races ^a		White		Black		Other ^b		
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	
All retired workers									
Total	29,203,660	895.00	25,883,360	911.70	2,370,600	774.80	882,840	733.10	
62–64	2,578,870	831.10	2,244,160	846.30	228,530	762.70	106,130	656.80	
62	689,330	824.00	597,070	839.40	60,380	761.90	31,880	654.30	
63	894,860	826.20	775,840	841.00	82,280	763.30	36,720	654.10	
64	994,680	840.40	871,250	855.80	85,870	762.60	37,530	661.70	
65–69	7,567,660	894.20	6,552,020	913.40	699,160	792.10	312,230	723.40	
65	1,613,890	927.40	1,390,380	947.30	149,520	825.40	73,360	758.90	
66	1,568,900	897.30	1,357,520	916.00	143,450	802.30	67,310	724.20	
67	1,532,120	881.80	1,325,730	901.10	144,400	776.80	61,190	712.80	
68	1,475,040	877.20	1,280,720	896.10	136,090	776.90	57,190	696.60	
69	1,377,710	884.00	1,197,670	903.10	125,700	774.80	53,180	714.60	
70–74	6,614,310	889.00	5,849,680	906.00	546,400	771.60	205,370	727.40	
70	1,393,740	897.80	1,215,970	916.30	127,400	785.80	49,030	734.30	
71	1,356,660	887.60	1,199,090	905.20	111,210	770.60	44,270	711.40	
72	1,349,640	883.40	1,197,680	900.60	108,230	764.30	41,540	706.50	
73	1,261,910	882.30	1,120,150	898.50	101,860	763.20	36,470	734.20	
74	1,252,360	893.50	1,116,790	909.00	97,700	771.10	34,060	756.50	
75–79	5,524,900	893.50	4,964,470	908.30	409,230	761.80	131,040	756.00	
75	1,223,300	899.50	1,093,160	915.70	94,590	767.20	31,530	749.70	
76	1,150,470	891.80	1,032,600	906.20	86,600	766.00	26,890	753.80	
77	1,102,830	903.20	990,610	918.40	82,260	766.90	25,920	766.60	
78	1,065,550	888.60	960,090	903.00	77,390	754.00	23,960	757.20	
79	982,750	882.30	888,010	895.90	68,390	751.60	22,740	753.80	
80–84	3,837,810	893.90	3,478,740	907.70	265,800	754.40	75,980	762.00	
80	911,860	882.10	821,730	896.00	65,700	751.30	20,240	754.70	
81	876,270	881.80	795,760	895.50	59,680	740.80	17,190	748.90	
82	772,290	882.10	701,080	895.10	52,600	747.80	15,120	757.30	
83	660,200	897.70	597,010	911.80	47,500	755.70	12,540	767.70	
84	617,190	939.40	563,160	953.20	40,320	786.70	10,890	796.50	
85–89	2,069,850	994.80	1,885,310	1,009.40	139,880	822.40	35,520	891.90	
85	537,530	967.90	490,670	981.30	34,730	804.20	9,520	875.50	
86	469,090	1,026.30	426,980	1,041.70	32,580	850.40	7,600	921.80	
87	409,810	1,011.00	373,850	1,025.10	26,710	839.10	7,340	917.00	
88	357,710	991.20	324,910	1,007.10	25,230	807.00	6,050	881.50	
89	295,710	975.30	268,900	990.30	20,630	806.10	5,010	853.40	
90–94	798,490	926.60	722,360	942.70	60,530	750.30	12,940	828.20	
95 or older	211,770	857.30	186,620	878.50	21,070	677.30	3,630	800.50	
Men									
Subtotal	15,107,850	1,008.10	13,452,980	1,029.80	1,131,220	848.40	494,200	789.60	
62–64	1,332,960	990.40	1,157,940	1,018.20	119,180	840.20	55,810	735.20	
62	351,270	991.70	304,190	1,020.00	31,150	842.20	15,930	744.90	
63	463,130	983.80	400,030	1,012.10	43,430	838.60	19,660	730.70	
64	518,560	995.40	453,720	1,022.40	44,600	840.30	20,220	731.80	
65–69	4,198,470	1,030.60	3,653,330	1,058.60	360,330	872.70	182,170	784.20	
65	891,960	1,081.00	772,110	1,111.70	77,970	913.00	41,490	828.70	
66	870,350	1,035.60	755,590	1,064.00	74,330	882.90	40,090	785.50	
67	851,290	1,014.50	740,540	1,042.30	73,940	857.00	36,290	769.50	
68	819,080	1,006.30	715,230	1,033.10	69,930	854.10	33,300	753.50	
69	765,790	1,010.10	669,860	1,036.70	64,160	850.30	31,000	773.00	
70–74	3,610,550	1,007.50	3,217,270	1,029.50	272,350	846.80	114,460	781.90	
70	763,270	1,025.70	670,430	1,051.30	64,560	861.90	27,450	791.20	
71	745,680	1,007.50	664,030	1,030.40	55,420	845.30	24,920	766.70	
72	741,430	999.40	662,730	1,021.60	54,460	837.80	22,970	752.60	
73	685,700	994.90	614,190	1,014.80	49,910	837.90	19,990	790.40	
74	674,470	1,008.60	605,890	1,028.10	48,000	847.70	19,130	814.90	
75–79	2,885,690	993.90	2,611,140	1,011.90	192,950	827.10	72,920	801.80	
75	652,560	1,013.00	587,450	1,033.60	45,550	838.60	17,630	790.80	
76	609,990	995.50	551,200	1,013.40	41,690	831.30	15,210	799.30	
77	572,760	1,008.40	518,250	1,026.80	38,820	831.40	13,990	825.40	
78	547,490	982.50	496,850	999.40	35,700	819.00	13,300	801.70	
79	502,890	963.20	457,390	978.80	31,190	808.60	12,790	794.40	
80–84	1,868,570	954.50	1,705,080	968.90	114,510	801.80	41,930	796.70	
80	462,050	953.90	418,760	969.80	30,210	803.40	11,340	784.10	
81	434,190	945.10	397,300	959.30	26,210	788.10	9,220	786.50	
82	377,760	931.60	344,980	944.90	22,540	784.40	8,770	799.40	
83	312,020	950.50	284,280	964.40	19,690	804.00	6,820	797.70	
84	282,550	1,005.00	259,760	1,018.80	15,860	843.20	5,780	832.80	

(Continued)

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2002—Continued

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Men (cont.)								
85–89	871,640	1,094.30	801,040	1,108.50	49,100	912.00	17,980	952.00
85	239,840	1,049.60	221,080	1,062.60	12,890	876.30	4,810	919.50
86	201,620	1,134.40	185,340	1,150.10	11,720	941.60	3,830	978.80
87	171,110	1,122.50	157,280	1,135.40	9,380	946.00	3,700	1,011.90
88	143,590	1,091.30	131,110	1,107.30	8,710	901.80	3,170	939.00
89	115,480	1,078.60	106,230	1,092.90	6,400	893.90	2,470	900.40
90–94	281,040	1,012.30	255,360	1,028.10	17,680	821.40	7,020	884.40
95 or older	58,930	940.30	51,820	961.50	5,120	751.90	1,910	860.00
Women								
Subtotal	14,095,810	773.90	12,430,380	784.00	1,239,380	707.50	388,640	661.30
62–64	1,245,910	660.70	1,086,220	663.10	109,350	678.20	50,320	570.00
62	338,060	649.80	292,880	651.80	29,230	676.20	15,950	563.80
63	431,730	657.10	375,810	659.00	38,850	679.20	17,060	565.70
64	476,120	671.60	417,530	674.70	41,270	678.60	17,310	579.80
65–69	3,369,190	724.30	2,898,690	730.30	338,830	706.30	130,060	638.40
65	721,930	737.60	618,270	742.00	71,550	730.00	31,870	668.10
66	698,550	724.90	601,930	730.20	69,120	715.50	27,220	634.00
67	680,830	715.90	585,190	722.50	70,460	692.60	24,900	630.10
68	655,960	716.10	565,490	722.80	66,160	695.20	23,890	617.30
69	611,920	726.10	527,810	733.70	61,540	696.10	22,180	633.00
70–74	3,003,760	746.60	2,632,410	755.10	274,050	696.90	90,910	658.80
70	630,470	743.00	545,540	750.40	62,840	707.70	21,580	661.90
71	610,980	741.20	535,060	749.80	55,790	696.40	19,350	640.20
72	608,210	742.10	534,950	750.80	53,770	689.90	18,570	649.50
73	576,210	748.40	505,960	757.30	51,950	691.50	16,480	666.20
74	577,890	759.10	510,900	767.80	49,700	697.00	14,930	681.60
75–79	2,639,210	783.60	2,353,330	793.30	216,280	703.50	58,120	698.50
75	570,740	769.70	505,710	778.80	49,040	700.90	13,900	697.70
76	540,480	774.90	481,400	783.50	44,910	705.40	11,680	694.60
77	530,070	789.40	472,360	799.40	43,440	709.20	11,930	697.80
78	518,060	789.30	463,240	799.70	41,690	698.20	10,660	701.70
79	479,860	797.40	430,620	807.90	37,200	703.80	9,950	701.70
80–84	1,969,240	836.50	1,773,660	848.90	151,290	718.50	34,050	719.30
80	449,810	808.40	402,970	819.30	35,490	706.90	8,900	717.30
81	442,080	819.70	398,460	831.80	33,470	703.80	7,970	705.50
82	394,530	834.70	356,100	846.90	30,060	720.40	6,350	699.10
83	348,180	850.40	312,730	864.10	27,810	721.40	5,720	732.00
84	334,640	884.00	303,400	897.00	24,460	750.00	5,110	755.40
85–89	1,198,210	922.40	1,084,270	936.20	90,780	773.90	17,540	830.30
85	297,690	902.00	269,590	914.70	21,840	761.60	4,710	830.50
86	267,470	944.80	241,640	958.50	20,860	799.10	3,770	863.90
87	238,700	931.10	216,570	945.00	17,330	781.20	3,640	820.50
88	214,120	924.10	193,800	939.40	16,520	757.00	2,880	818.20
89	180,230	909.10	162,670	923.20	14,230	766.60	2,540	807.60
90–94	517,450	880.10	467,000	896.00	42,850	721.00	5,920	761.50
95 or older	152,840	825.30	134,800	846.60	15,950	653.30	1,720	734.30

a. Includes 66,860 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2002

		All races ^a		White		Black		Other ^b	
		Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All disabled workers									
	Total	5,535,860	834.10	4,016,610	860.30	944,570	775.40	539,060	745.30
Under 20		1,680	349.40	1,120	357.90	300	314.00	260	353.50
20–24		51,170	457.80	33,730	462.80	10,610	437.10	6,830	465.00
20		4,220	377.60	2,680	385.70	880	351.00	660	379.90
21		7,250	418.20	4,970	416.30	1,340	393.80	940	463.20
22		10,720	443.90	6,800	451.50	2,430	418.10	1,490	451.50
23		13,540	474.10	9,140	478.00	2,680	452.00	1,720	487.80
24		15,440	493.50	10,140	499.70	3,280	479.90	2,020	484.30
25–29		114,130	551.80	73,900	564.50	22,450	536.30	17,650	518.40
25		19,020	518.80	12,590	522.70	3,700	520.00	2,730	499.20
26		20,480	534.30	13,500	544.00	3,770	514.00	3,200	516.10
27		22,610	550.80	14,780	562.80	4,200	530.90	3,620	524.60
28		25,410	568.70	16,000	585.00	5,410	550.60	3,960	528.10
29		26,610	573.70	17,030	593.80	5,370	553.30	4,140	518.00
30–34		212,050	625.90	141,820	640.40	37,790	600.80	30,700	591.20
30		31,880	587.70	20,830	602.60	5,960	564.70	4,860	552.90
31		37,210	610.50	24,640	625.80	6,650	592.20	5,720	567.10
32		43,660	622.10	29,320	636.50	7,550	592.60	6,370	594.60
33		46,520	638.00	31,400	654.20	8,110	609.90	6,620	596.50
34		52,780	652.40	35,630	663.80	9,520	628.20	7,130	628.70
35–39		371,850	691.80	254,960	710.80	67,300	648.80	46,140	653.60
35		56,000	666.20	37,540	683.10	10,260	626.60	7,560	639.10
36		64,440	677.10	43,650	697.90	11,730	636.70	8,390	632.50
37		75,380	685.10	51,550	700.90	13,480	649.60	9,600	651.10
38		84,980	706.20	58,950	726.00	15,530	660.50	9,880	662.80
39		91,050	710.30	63,270	730.10	16,300	659.50	10,710	674.30
40–44		595,190	748.30	418,170	768.20	108,400	692.00	63,600	718.10
40		100,720	716.80	70,480	735.60	17,920	655.20	11,500	700.50
41		110,350	737.20	77,920	756.90	19,940	680.70	11,440	710.30
42		119,650	748.10	84,440	768.80	21,490	690.70	12,590	714.00
43		129,920	761.70	90,750	783.60	24,230	703.30	13,930	721.70
44		134,550	768.30	94,580	786.60	24,820	717.70	14,140	738.80
45–49		784,070	810.90	549,520	834.90	144,620	752.90	83,200	754.60
45		145,250	784.60	102,110	806.00	26,670	729.00	15,240	738.80
46		152,940	800.70	106,290	828.10	28,760	733.50	16,690	742.20
47		157,380	810.20	110,320	834.80	29,320	754.20	16,450	751.40
48		162,250	819.50	114,140	843.80	29,330	763.10	17,280	755.50
49		166,250	835.60	116,660	857.70	30,540	781.10	17,540	782.30
50–54		968,330	864.50	686,320	883.70	173,340	823.00	98,670	802.40
50		175,670	840.60	125,730	861.40	30,750	790.00	17,740	779.30
51		185,370	858.30	131,010	876.80	33,890	812.10	18,580	810.10
52		190,150	860.50	133,100	882.00	35,280	821.50	19,800	785.90
53		202,680	870.90	142,810	888.20	36,910	838.10	20,790	805.80
54		214,460	886.90	153,670	905.10	36,510	846.80	21,760	826.20
55–59		1,177,130	906.40	880,120	928.70	188,940	856.10	102,460	810.20
55		235,330	898.40	172,580	916.10	38,170	857.50	22,620	831.20
56		231,720	903.40	172,440	925.40	36,460	854.30	21,490	813.00
57		217,270	900.40	159,870	924.60	36,980	852.90	19,510	795.90
58		233,870	911.70	177,100	934.30	37,190	857.60	18,840	809.90
59		258,940	916.70	198,130	940.80	40,140	858.10	20,000	797.70
60–64		1,260,260	916.80	976,950	943.40	190,820	843.80	89,550	786.30
60		260,490	919.70	200,110	946.20	39,560	852.20	20,040	790.50
61		254,100	917.70	194,710	944.20	38,970	848.10	19,840	798.50
62		253,820	922.30	197,340	950.00	38,340	842.80	17,730	789.70
63		247,050	916.20	192,040	943.10	37,790	841.00	16,590	783.30
64		244,800	907.70	192,750	933.40	36,160	833.80	15,350	764.50
Men									
	Subtotal	3,069,140	935.00	2,256,900	973.10	497,200	834.50	292,990	820.30
Under 20		1,030	353.80	690	363.40	160	279.00	180	383.20
20–24		30,920	468.00	20,440	472.20	6,060	447.60	4,420	476.80
20		2,620	380.10	1,630	383.30	560	369.30	430	381.90
21		4,540	425.70	3,190	426.40	810	385.20	540	481.80
22		6,520	456.80	4,240	457.60	1,260	438.30	1,020	476.40
23		8,060	491.10	5,330	498.90	1,640	458.50	1,090	502.30
24		9,180	501.70	6,050	506.90	1,790	497.10	1,340	484.80

(Continued)

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2002—Continued

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Men (cont.)</i>								
25–29	63,650	563.00	40,970	578.40	12,530	540.90	10,050	527.90
25	10,970	531.00	7,140	538.70	2,170	527.10	1,660	503.00
26	11,420	550.00	7,630	565.90	1,900	525.20	1,880	508.90
27	12,880	557.50	8,230	576.30	2,500	521.60	2,150	527.10
28	14,010	579.70	8,910	595.50	2,950	549.30	2,120	556.40
29	14,370	586.60	9,060	605.10	3,010	568.60	2,240	536.10
30–34	117,000	638.40	77,130	655.10	20,630	607.70	18,100	604.00
30	17,520	596.20	11,490	613.60	3,130	559.70	2,800	563.50
31	20,210	631.40	13,030	650.40	3,570	601.10	3,470	591.50
32	23,750	636.90	15,740	655.10	3,980	600.50	3,740	605.80
33	26,420	648.60	17,730	664.20	4,560	623.70	3,900	608.90
34	29,100	660.60	19,140	674.60	5,390	631.90	4,190	635.30
35–39	206,580	710.10	140,110	734.30	37,670	654.40	26,650	666.10
35	31,170	678.40	20,670	702.00	5,710	624.90	4,370	641.80
36	35,500	694.10	23,930	722.10	6,250	637.40	4,870	639.40
37	41,900	701.90	28,010	724.70	7,740	647.00	5,710	662.60
38	47,670	728.30	33,030	754.00	8,610	670.70	5,680	669.70
39	50,340	730.70	34,470	751.30	9,360	675.00	6,020	705.20
40–44	329,680	785.90	231,850	812.00	59,180	710.30	35,540	749.70
40	56,350	743.20	39,610	765.60	9,720	664.30	6,520	729.20
41	60,940	768.20	43,050	794.90	10,850	691.50	6,350	733.90
42	66,000	783.70	46,640	810.70	11,690	711.50	7,000	735.90
43	72,560	804.70	50,570	836.40	13,430	718.80	7,960	753.50
44	73,830	816.40	51,980	839.00	13,490	749.10	7,710	788.50
45–49	429,050	876.10	302,100	909.80	78,320	784.10	44,600	814.40
45	79,620	839.70	55,920	873.90	14,440	746.40	8,460	778.50
46	85,060	858.00	58,770	898.00	16,320	756.90	9,220	785.10
47	86,030	876.10	60,640	909.10	16,050	790.60	8,650	812.70
48	88,230	890.20	62,660	921.70	15,520	802.80	9,070	830.10
49	90,110	911.50	64,110	941.10	15,990	821.10	9,200	862.90
50–54	529,110	965.20	380,500	993.70	89,550	883.70	52,900	901.20
50	96,140	927.10	70,270	956.10	15,470	838.90	9,650	857.90
51	101,050	953.20	72,100	980.80	17,790	868.90	10,050	904.20
52	103,810	957.10	74,190	985.20	18,300	879.10	10,010	896.70
53	110,930	975.00	78,980	1,004.00	19,370	898.50	11,260	903.10
54	117,180	1,004.60	84,960	1,033.40	18,620	924.10	11,930	935.80
55–59	647,250	1,050.50	493,270	1,082.70	96,780	953.90	53,550	936.20
55	129,340	1,024.30	95,600	1,052.10	20,280	945.10	12,190	945.80
56	127,420	1,040.10	96,490	1,071.60	18,500	941.90	11,610	938.60
57	119,170	1,045.50	89,400	1,082.30	19,030	942.60	10,140	921.40
58	129,210	1,063.00	100,160	1,093.50	18,840	970.10	9,730	938.60
59	142,110	1,076.50	111,620	1,109.00	20,130	969.10	9,880	934.40
60–64	714,870	1,080.10	569,840	1,112.30	96,320	968.60	47,000	923.50
60	144,820	1,083.80	114,020	1,117.90	20,400	965.80	9,880	939.90
61	143,140	1,080.40	112,560	1,113.30	19,690	971.50	10,570	936.80
62	144,160	1,087.90	115,550	1,120.00	19,020	972.50	9,380	929.80
63	142,100	1,079.80	113,640	1,111.70	19,250	966.60	8,860	923.80
64	140,650	1,068.10	114,070	1,098.30	17,960	966.40	8,310	879.90
<i>Women</i>								
Subtotal	2,466,720	708.60	1,759,710	715.60	447,370	709.80	246,070	656.00
Under 20	650	342.40	430	349.10	140	353.90	80	286.50
20–24	20,250	442.10	13,290	448.40	4,550	423.10	2,410	443.40
20	1,600	373.50	1,050	389.50	320	319.20	230	376.10
21	2,710	405.80	1,780	398.20	530	406.90	400	438.00
22	4,200	423.90	2,560	441.40	1,170	396.30	470	397.30
23	5,480	449.00	3,810	448.80	1,040	441.70	630	462.60
24	6,260	481.40	4,090	489.20	1,490	459.20	680	483.40
25–29	50,480	537.70	32,930	547.20	9,920	530.60	7,600	505.80
25	8,050	502.20	5,450	501.70	1,530	509.80	1,070	493.30
26	9,060	514.40	5,870	515.50	1,870	502.70	1,320	526.50
27	9,730	541.90	6,550	545.70	1,700	544.50	1,470	520.90
28	11,400	555.10	7,090	571.80	2,460	552.10	1,840	495.50
29	12,240	558.60	7,970	580.90	2,360	533.70	1,900	496.70

(Continued)

5.A OASDI Current-Pay Benefits

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2002—Continued

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Women (cont.)</i>								
30–34	95,050	610.50	64,690	623.00	17,160	592.50	12,600	572.80
30	14,360	577.30	9,340	589.00	2,830	570.20	2,060	538.50
31	17,000	585.60	11,610	598.20	3,080	582.00	2,250	529.50
32	19,910	604.40	13,580	614.80	3,570	583.70	2,630	578.70
33	20,100	624.10	13,670	641.20	3,550	592.20	2,720	578.70
34	23,680	642.30	16,490	651.30	4,130	623.40	2,940	619.30
35–39	165,270	669.00	114,850	682.10	29,630	641.50	19,490	636.70
35	24,830	650.90	16,870	660.00	4,550	628.70	3,190	635.40
36	28,940	656.10	19,720	668.70	5,480	636.00	3,520	623.00
37	33,480	664.20	23,540	672.50	5,740	653.10	3,890	634.30
38	37,310	678.00	25,920	690.40	6,920	647.80	4,200	653.60
39	40,710	685.00	28,800	704.80	6,940	638.60	4,690	634.70
40–44	265,510	701.70	186,320	713.80	49,220	670.00	28,060	678.10
40	44,370	683.30	30,870	697.20	8,200	644.40	4,980	663.00
41	49,410	699.00	34,870	710.10	9,090	667.80	5,090	680.90
42	53,650	704.30	37,800	717.10	9,800	665.90	5,590	686.50
43	57,360	707.30	40,180	717.10	10,800	684.10	5,970	679.30
44	60,720	709.80	42,600	722.70	11,330	680.20	6,430	679.30
45–49	355,020	732.20	247,420	743.40	66,300	716.10	38,600	685.50
45	65,630	717.80	46,190	723.90	12,230	708.50	6,780	689.10
46	67,880	728.90	47,520	741.70	12,440	702.90	7,470	689.20
47	71,350	730.80	49,680	744.10	13,270	710.20	7,800	683.40
48	74,020	735.20	51,480	749.10	13,810	718.50	8,210	673.10
49	76,140	745.70	52,550	755.90	14,550	737.20	8,340	693.30
50–54	439,220	743.20	305,820	746.90	83,790	758.00	45,770	688.10
50	79,530	735.90	55,460	741.50	15,280	740.60	8,090	685.50
51	84,320	744.50	58,910	749.60	16,100	749.40	8,530	699.30
52	86,340	744.40	58,910	751.90	16,980	759.40	9,790	672.70
53	91,750	745.10	63,830	744.90	17,540	771.40	9,530	690.80
54	97,280	745.10	68,710	746.50	17,890	766.30	9,830	693.10
55–59	529,880	730.40	386,850	732.30	92,160	753.50	48,910	672.30
55	105,990	744.70	76,980	747.20	17,890	758.20	10,430	697.30
56	104,300	736.50	75,950	739.80	17,960	764.00	9,880	665.50
57	98,100	724.10	70,470	724.50	17,950	757.80	9,370	660.00
58	104,660	724.80	76,940	727.00	18,350	742.10	9,110	672.40
59	116,830	722.40	86,510	723.70	20,010	746.50	10,120	664.30
60–64	545,390	702.80	407,110	707.10	94,500	716.60	42,550	634.80
60	115,670	714.30	86,090	718.90	19,160	731.30	10,160	645.20
61	110,960	707.80	82,150	712.40	19,280	722.20	9,270	640.80
62	109,660	704.70	81,790	709.90	19,320	715.10	8,350	632.20
63	104,950	694.80	78,400	698.70	18,540	710.70	7,730	622.30
64	104,150	690.90	78,680	694.20	18,200	703.00	7,040	628.30

a. Includes 35,620 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

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Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2002

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All spouses								
Total	2,832,350	439.00	2,553,740	451.30	146,250	349.30	123,990	297.00
<i>Wives</i>								
Subtotal	2,793,950	441.70	2,529,560	453.10	141,390	352.20	114,860	303.00
Entitlement based on care of children	151,140	240.80	111,950	257.80	19,700	215.00	18,830	169.90
Under 35	20,350	138.20	14,260	146.90	2,660	121.20	3,300	115.10
35–39	23,080	168.80	16,650	179.00	2,820	155.20	3,530	133.00
40–44	30,620	211.00	22,410	223.70	4,040	193.30	4,020	160.90
45–49	28,740	252.60	20,790	269.20	4,230	224.80	3,600	190.60
50–54	20,690	297.20	15,660	313.80	2,690	270.00	2,220	219.10
55–59	14,610	326.30	11,440	346.00	1,720	280.40	1,390	225.20
60–61	5,850	381.80	4,660	394.90	760	362.50	430	274.20
62–64	7,200	391.30	6,080	404.20	780	332.30	340	295.60
Entitlement based on age	2,642,810	453.20	2,417,610	462.20	121,690	374.50	96,030	329.10
62–64	306,150	410.90	273,710	422.30	16,290	335.60	15,860	294.40
62	77,560	401.10	69,290	412.00	3,880	330.10	4,310	291.20
63	105,130	406.90	93,980	418.40	5,690	320.30	5,330	298.00
64	123,460	420.60	110,440	432.10	6,720	351.70	6,220	293.60
65–69	715,980	454.30	642,140	466.30	38,000	375.30	34,610	323.60
65	140,080	452.30	125,260	464.70	7,610	377.30	7,050	315.80
66	143,870	455.30	128,710	467.50	7,410	378.50	7,540	325.10
67	146,110	454.90	130,590	467.00	8,070	372.00	7,160	333.60
68	145,890	453.20	131,120	464.10	8,070	384.00	6,370	321.00
69	140,030	456.00	126,460	468.20	6,840	363.30	6,490	321.70
70–74	689,060	456.40	632,140	464.90	31,820	381.90	22,960	330.40
70	142,840	457.20	130,280	466.80	7,020	376.40	5,170	333.90
71	141,570	458.70	130,230	467.00	6,220	390.00	4,690	323.30
72	142,510	455.80	130,530	464.40	6,680	388.70	4,890	326.90
73	132,790	455.90	122,130	464.80	5,980	372.60	4,300	329.30
74	129,350	454.00	118,970	461.50	5,920	381.70	3,910	340.00
75–79	528,860	455.10	491,090	461.30	21,730	383.50	13,890	348.90
75	124,480	458.30	115,480	464.70	5,270	391.10	3,230	344.30
76	113,170	455.20	104,740	462.80	4,910	373.30	3,130	338.00
77	106,170	454.70	98,120	461.00	4,530	386.30	3,100	357.40
78	97,420	450.10	91,250	455.20	3,540	382.50	2,230	346.40
79	87,620	456.20	81,500	461.90	3,480	384.00	2,200	361.50
80–84	288,030	465.60	270,590	471.00	9,680	378.30	6,560	370.00
85–89	94,370	500.90	88,800	506.60	3,320	404.30	1,830	399.50
90–94	18,630	491.70	17,570	496.50	710	395.30	300	458.80
95 or older	1,730	479.90	1,570	481.80	140	480.40	20	324.90
<i>Husbands</i>								
Subtotal	38,400	247.70	24,180	254.50	4,860	262.30	9,130	221.80
Under 62	1,970	144.60	1,380	141.70	300	166.30	290	135.60
62–64	1,690	206.20	1,050	196.40	240	240.60	400	211.20
65–69	8,740	254.40	5,540	258.10	1,080	264.30	2,120	239.90
70–74	10,370	259.70	6,150	266.40	1,420	289.90	2,770	229.40
75–79	8,410	249.00	5,290	262.40	920	271.30	2,090	204.00
80–84	4,030	250.40	2,470	264.60	570	246.10	950	218.60
85–89	2,030	263.20	1,490	272.20	180	256.80	320	226.90
90 or older	1,160	280.50	810	292.70	150	227.40	190	268.70

(Continued)

5.A OASDI Current-Pay Benefits

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2002—Continued

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Spouses of retired workers								
Total	2,681,090	451.90	2,439,880	462.00	127,590	372.30	105,910	318.90
<i>Wives</i>								
Subtotal	2,646,800	454.40	2,418,360	463.70	123,480	375.50	97,470	326.80
By basis of entitlement								
Care of children	53,050	360.90	41,840	378.90	6,480	324.40	4,570	252.00
Under 35	1,780	311.10	1,330	331.20	250	261.50	180	252.60
35–39	3,490	300.50	2,620	318.60	550	271.60	320	202.00
40–44	7,390	331.10	5,710	346.90	1,000	304.00	660	241.30
45–49	9,710	355.40	7,480	373.00	1,260	334.70	930	244.60
50–54	10,120	361.80	7,940	379.70	1,150	337.70	1,010	250.20
55–59	9,070	370.70	7,230	392.50	980	316.00	800	251.00
60–61	4,850	399.90	3,900	414.80	590	368.40	360	290.30
62–64	6,640	403.60	5,630	415.10	700	351.50	310	312.10
Age	2,593,750	456.30	2,376,520	465.20	117,000	378.30	92,900	330.50
62–64	277,520	424.80	248,930	436.70	14,140	344.90	14,230	297.00
62	66,430	422.20	59,550	434.20	3,090	344.10	3,740	297.20
63	94,760	420.40	85,070	432.30	4,870	330.80	4,720	300.40
64	116,330	429.70	104,310	441.60	6,180	356.40	5,770	294.10
65–69	700,470	457.70	629,660	469.50	36,190	380.30	33,450	324.30
65	134,810	458.10	120,900	470.40	7,080	382.80	6,680	316.90
66	140,380	459.30	125,890	471.40	7,000	384.40	7,280	326.40
67	143,080	458.30	128,250	469.90	7,670	379.80	6,910	334.40
68	143,830	455.10	129,550	465.90	7,770	386.80	6,190	321.00
69	138,370	457.90	125,070	470.00	6,670	366.20	6,390	321.70
70–74	685,350	457.20	629,280	465.70	31,240	383.40	22,700	330.80
70	141,720	458.70	129,410	468.10	6,840	379.10	5,100	334.60
71	140,730	459.50	129,540	467.70	6,110	391.30	4,650	323.60
72	141,760	456.70	129,980	465.10	6,570	390.00	4,810	327.50
73	132,180	456.60	121,640	465.50	5,880	373.30	4,280	329.20
74	128,960	454.30	118,710	461.70	5,840	383.10	3,860	340.00
75–79	527,800	455.30	490,220	461.60	21,620	384.00	13,820	349.00
75	124,180	458.60	115,250	465.00	5,240	390.70	3,200	344.60
76	112,870	455.50	104,510	463.00	4,860	374.50	3,110	337.60
77	106,000	455.00	97,980	461.30	4,520	387.00	3,080	358.00
78	97,200	450.40	91,050	455.50	3,520	382.90	2,230	346.40
79	87,550	456.30	81,430	462.10	3,480	384.00	2,200	361.50
80–84	287,900	465.80	270,500	471.10	9,650	379.20	6,550	370.10
85–89	94,350	500.90	88,790	506.60	3,310	404.20	1,830	399.50
90–94	18,630	491.70	17,570	496.50	710	395.30	300	458.80
95 or older	1,730	479.90	1,570	481.80	140	480.40	20	324.90
By marital status								
Nondivorced wives	2,523,970	454.60	2,313,040	463.80	110,710	373.80	93,070	325.10
Divorced wives	122,830	451.10	105,320	462.10	12,770	390.50	4,400	363.60
<i>Husbands</i>								
Subtotal	34,290	257.30	21,520	265.70	4,110	275.90	8,440	226.80

(Continued)

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2002—Continued

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Spouses of disabled workers</i>								
Total	151,260	211.60	113,860	221.90	18,660	191.80	18,080	169.20
<i>Wives</i>								
Subtotal	147,150	212.80	111,200	223.30	17,910	191.90	17,390	169.50
By basis of entitlement								
Care of children	98,090	175.90	70,110	185.50	13,220	161.40	14,260	143.70
Under 35	18,570	121.70	12,930	128.00	2,410	106.60	3,120	107.10
35–39	19,590	145.40	14,030	153.00	2,270	127.00	3,210	126.20
40–44	23,230	172.90	16,700	181.50	3,040	156.90	3,360	145.20
45–49	19,030	200.10	13,310	210.80	2,970	178.10	2,670	171.70
50–54	10,570	235.40	7,720	246.10	1,540	219.40	1,210	193.10
55–59	5,540	253.50	4,210	266.00	740	233.10	590	190.20
60–61	1,000	294.40	760	293.20	170	342.20	70	191.40
62–64	560	246.30	450	268.80	80	165.00	30	125.00
Age								
62–64	49,060	286.50	41,090	287.80	4,690	278.20	3,130	287.20
62	28,630	277.00	24,780	277.90	2,150	274.50	1,630	272.10
63	11,130	274.70	9,740	276.20	790	275.70	570	252.00
64	10,370	282.60	8,910	285.70	820	257.90	610	279.80
65–69	7,130	272.30	6,130	269.40	540	297.90	450	287.00
65	15,510	300.40	12,480	304.30	1,810	276.40	1,160	302.60
66	5,270	304.60	4,360	306.00	530	303.40	370	296.00
67	3,490	293.10	2,820	295.70	410	278.90	260	288.20
68	3,030	292.00	2,340	303.10	400	222.90	250	310.10
69	2,060	314.20	1,570	314.80	300	312.30	180	318.90
70–74	1,660	300.90	1,390	306.20	170	248.50	100	316.30
70	3,710	296.10	2,860	295.60	580	299.20	260	301.70
71	1,120	268.00	870	265.50	180	273.90	70	283.30
72	840	320.00	690	321.80	110	318.70	40	291.70
73	750	284.10	550	282.40	110	308.40	80	285.30
74	610	299.30	490	290.20	100	331.80	20	359.50
75 or older	390	343.20	260	364.70	80	276.20	50	338.70
By marital status								
Nondivorced wives	142,480	210.80	107,590	221.70	17,240	188.10	17,030	167.20
Divorced wives	4,670	273.60	3,610	270.20	670	292.10	360	278.90
<i>Husbands</i>								
Subtotal	4,110	168.10	2,660	163.70	750	188.00	690	160.90

a. Includes 8,370 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2002

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All children								
Total	3,915,520	432.30	2,628,160	463.20	847,610	378.20	412,670	345.70
Under age 18	3,041,690	399.50	1,952,780	426.70	687,090	355.30	377,990	337.30
Under 1	9,970	274.10	6,100	282.50	2,150	232.00	1,640	295.90
1	25,980	307.70	16,070	322.20	5,390	267.40	4,450	305.20
2	36,710	308.60	22,650	326.70	8,450	274.80	5,520	287.60
3	50,650	323.70	31,490	339.20	11,160	284.90	7,840	318.60
4	64,200	337.20	40,040	360.80	14,040	296.20	9,900	302.10
5	79,720	336.50	49,840	357.30	17,810	301.40	11,820	304.80
6	94,860	348.00	59,870	369.60	21,310	312.00	13,420	311.20
7	112,660	350.80	71,360	372.30	25,090	312.40	15,860	318.10
8	136,410	357.80	85,790	382.10	31,790	316.10	18,150	317.80
9	160,810	361.30	100,330	384.60	38,470	325.10	21,140	318.40
10	187,190	368.40	118,440	395.20	43,060	324.70	24,460	317.20
11	216,390	374.60	135,420	399.80	51,270	339.60	27,870	318.10
12	248,100	389.70	156,500	415.50	58,050	349.20	31,340	333.90
13	271,750	396.60	174,150	422.80	62,650	355.30	32,560	333.00
14	298,090	410.20	193,390	437.90	67,460	366.00	34,150	338.70
15	319,600	426.20	207,530	452.90	71,570	384.50	37,240	353.50
16	348,430	455.50	230,920	485.30	75,540	401.50	38,990	379.10
17	380,170	465.90	252,890	496.80	81,830	411.40	41,640	379.80
Disabled adult children	748,660	551.00	589,680	571.50	132,260	480.50	24,800	436.40
18–19	12,070	462.80	8,160	491.40	2,880	397.90	940	414.50
20–24	57,790	470.40	37,360	494.30	15,650	435.90	4,360	388.20
25–29	62,390	509.40	43,160	532.30	15,480	467.00	3,410	397.60
30–34	76,210	541.70	55,460	558.60	16,900	502.30	3,510	467.30
35–39	98,150	557.20	74,440	577.50	19,860	501.80	3,690	447.40
40–44	110,480	572.80	87,510	594.00	20,000	498.60	2,820	443.20
45–49	97,240	580.90	78,850	603.70	15,760	487.10	2,450	446.20
50–54	75,210	586.70	63,520	604.60	10,130	490.40	1,460	478.60
55–59	55,070	583.20	48,230	596.70	6,050	484.60	760	500.40
60–64	38,440	579.60	33,690	592.20	3,990	485.30	670	487.20
65–69	26,450	542.70	23,550	552.90	2,580	457.10	310	476.20
70–74	18,380	514.40	16,690	522.10	1,450	435.20	230	462.40
75–79	12,130	486.10	11,130	493.00	890	398.80	110	491.90
80 or older	8,650	456.30	7,930	461.90	640	388.70	80	447.00
Students, aged 18–19	125,170	519.80	85,700	548.60	28,260	456.30	9,880	439.60
18	116,440	519.50	80,490	548.10	25,500	453.20	9,220	441.20
19	8,730	523.50	5,210	557.00	2,760	484.90	660	418.50
Children of retired workers								
Subtotal	477,380	427.70	349,660	453.10	95,480	376.60	31,270	303.10
Under age 18	269,590	398.60	178,300	425.40	67,010	367.70	23,710	288.80
Under 1	440	374.80	310	380.90	90	439.60	40	181.80
1	1,190	377.60	780	390.40	270	403.50	140	256.30
2	2,010	375.20	1,230	391.60	570	368.00	200	306.50
3	2,620	359.50	1,750	371.20	620	359.80	250	276.50
4	3,780	357.60	2,310	382.10	1,060	334.30	410	280.00
5	5,100	351.20	3,290	372.30	1,290	342.20	490	239.90
6	6,170	376.50	3,850	395.00	1,790	370.20	510	270.60
7	7,280	368.80	4,430	390.10	2,170	358.40	680	263.00
8	9,710	372.20	6,000	388.10	2,870	373.50	810	257.90
9	11,250	358.20	7,210	376.40	3,040	345.60	980	268.30
10	14,970	365.30	9,520	394.00	4,170	340.30	1,270	233.90
11	17,370	376.70	11,390	400.80	4,600	353.70	1,300	257.20
12	21,280	382.10	13,670	412.70	5,840	338.50	1,700	291.10
13	24,780	380.10	16,330	403.40	6,370	356.00	2,040	268.80
14	28,890	389.20	19,370	413.10	6,820	363.40	2,630	282.50
15	31,880	397.70	21,570	420.00	7,480	379.00	2,770	275.90
16	37,790	439.70	25,450	468.90	8,970	394.80	3,320	340.20
17	43,080	447.30	29,840	481.20	8,990	395.00	4,170	321.80

(Continued)

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2002—Continued

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Children of retired workers (cont.)</i>								
Disabled adult children	193,150	465.10	160,780	480.60	25,250	397.00	6,730	352.40
18–19	1,890	428.30	1,470	456.60	330	355.80	90	233.00
20–24	9,900	417.50	6,890	442.00	2,320	371.40	640	321.90
25–29	14,860	441.00	11,640	462.40	2,400	387.80	770	282.40
30–34	24,980	464.60	20,390	477.60	3,330	404.40	1,220	419.30
35–39	38,390	474.20	31,700	489.70	5,220	410.10	1,410	362.20
40–44	44,400	483.20	38,040	498.80	5,280	402.60	1,030	333.90
45–49	31,290	466.70	26,650	480.00	3,610	394.30	940	360.30
50–54	16,550	458.80	14,370	468.60	1,760	403.70	400	349.20
55–59	7,300	447.60	6,440	457.20	710	366.80	130	328.60
60–64	2,530	463.10	2,270	470.90	180	392.80	70	443.20
65–69	730	422.70	650	436.00	60	333.20	20	258.70
70 or older	330	400.60	270	416.30	50	323.70	10	360.00
Students, aged 18–19	14,640	468.50	10,580	501.20	3,220	401.70	830	312.40
18	13,620	470.30	9,960	502.90	2,880	400.00	770	312.70
19	1,020	444.70	620	473.70	340	415.70	60	309.50
<i>Children of deceased workers</i>								
Subtotal	1,905,050	584.20	1,266,870	629.80	432,850	491.10	189,220	492.90
Under age 18	1,344,680	571.90	835,560	625.80	324,520	477.10	170,660	488.60
Under 1	1,780	549.40	880	593.00	350	436.90	550	551.20
1	7,490	548.20	4,120	618.20	1,650	407.40	1,720	515.60
2	11,030	525.70	6,290	585.20	2,640	435.30	2,100	461.00
3	17,650	534.80	10,030	592.80	4,140	433.10	3,480	488.50
4	24,370	539.30	14,290	603.80	5,750	432.00	4,320	467.70
5	30,490	532.30	18,070	591.30	7,360	431.50	5,040	469.30
6	37,840	541.40	22,940	595.60	8,890	449.80	6,000	469.70
7	45,760	537.10	27,550	590.40	11,150	436.90	7,010	488.90
8	57,030	538.10	34,490	595.40	14,210	430.70	8,140	484.20
9	69,480	535.50	41,330	590.50	17,830	446.00	9,910	469.00
10	82,430	540.10	50,380	597.90	20,180	433.90	11,160	476.00
11	96,150	542.60	57,260	597.60	25,110	457.60	12,850	467.80
12	112,470	559.60	68,180	613.80	28,290	469.00	14,670	483.50
13	123,230	563.80	76,370	617.00	30,170	473.70	15,100	476.00
14	136,160	580.90	85,770	634.30	33,110	487.30	15,320	492.10
15	149,200	588.80	93,990	639.20	35,550	502.20	17,460	495.30
16	162,750	612.40	106,240	659.80	36,860	520.00	17,670	518.20
17	179,370	616.70	117,380	665.90	41,280	521.00	18,160	515.40
Disabled adult children	494,750	609.20	387,280	631.30	92,930	528.80	13,360	522.80
18–19	5,820	590.60	3,730	640.00	1,560	491.80	470	529.80
20–24	27,710	596.60	17,140	634.50	8,520	535.80	1,820	522.40
25–29	31,370	624.50	20,440	660.90	9,150	556.30	1,570	525.90
30–34	40,080	636.30	27,290	668.00	11,070	569.30	1,490	558.40
35–39	53,230	636.50	37,940	671.70	13,390	550.70	1,820	539.20
40–44	63,920	640.70	47,920	675.50	14,220	537.90	1,690	511.40
45–49	65,770	635.90	52,120	667.40	12,050	516.50	1,510	499.80
50–54	58,620	623.00	49,110	644.60	8,370	508.70	1,060	527.40
55–59	47,770	603.90	41,790	618.30	5,340	500.20	630	535.80
60–64	35,910	587.80	31,420	601.00	3,810	489.70	600	492.30
65–69	25,720	546.10	22,900	556.30	2,520	460.00	290	491.20
70–74	18,180	515.80	16,530	523.30	1,420	437.00	220	467.00
75–79	12,060	486.70	11,070	493.50	880	399.80	110	491.90
80 or older	8,590	456.30	7,880	461.70	630	390.70	80	447.00
Students, aged 18–19	65,620	648.40	44,030	690.30	15,400	556.60	5,200	556.30
18	60,460	650.30	40,960	691.70	13,750	555.70	4,820	558.70
19	5,160	625.80	3,070	672.00	1,650	563.50	380	526.30

(Continued)

5.A OASDI Current-Pay Benefits

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2002—Continued

Age	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Children of disabled workers</i>								
Subtotal	1,533,090	245.00	1,011,630	258.10	319,280	225.70	192,180	207.80
Under age 18	1,427,420	237.30	938,920	249.80	295,560	218.80	183,620	203.00
Under 1	7,750	205.20	4,910	220.70	1,710	179.20	1,050	166.50
1	17,300	198.70	11,170	208.30	3,470	190.20	2,590	168.10
2	23,670	201.80	15,130	214.00	5,240	183.80	3,220	173.40
3	30,380	198.00	19,710	207.30	6,400	181.80	4,110	177.30
4	36,050	198.40	23,440	210.50	7,230	182.70	5,170	165.40
5	44,130	199.50	28,480	207.10	9,160	191.20	6,290	178.00
6	50,850	200.60	33,080	209.90	10,630	186.90	6,910	176.60
7	59,620	205.60	39,380	217.60	11,770	186.00	8,170	176.30
8	69,670	208.20	45,300	218.90	14,710	194.20	9,200	175.80
9	80,080	210.70	51,790	221.50	17,600	199.00	10,250	177.50
10	89,790	211.30	58,540	220.90	18,710	203.30	12,030	178.70
11	102,870	217.30	66,770	229.90	21,560	199.10	13,720	183.70
12	114,350	224.00	74,650	234.90	23,920	210.10	14,970	192.20
13	123,740	233.50	81,450	244.60	26,110	218.30	15,420	201.40
14	133,040	240.10	88,250	252.60	27,530	220.90	16,200	202.80
15	138,520	257.70	91,970	270.20	28,540	239.40	17,010	220.60
16	147,890	287.00	99,230	302.80	29,710	256.40	18,000	249.90
17	157,720	299.50	105,670	313.30	31,560	272.60	19,310	264.70
Disabled adult children	60,760	349.30	41,620	366.30	14,080	311.30	4,710	311.20
18–19	4,360	307.10	2,960	321.40	990	264.10	380	315.00
20–24	20,180	322.90	13,330	341.00	4,810	290.00	1,900	282.10
25–29	16,160	349.10	11,080	368.30	3,930	307.60	1,070	292.30
30–34	11,150	374.80	7,780	387.00	2,500	335.90	800	370.80
35–39	6,530	398.80	4,800	413.40	1,250	360.60	460	345.80
40 or older	2,380	397.80	1,670	403.30	600	378.20	100	416.80
Students, aged 18–19	44,910	348.50	31,090	364.10	9,640	314.40	3,850	309.50
18	42,360	348.60	29,570	364.40	8,870	311.50	3,630	312.40
19	2,550	348.20	1,520	358.80	770	347.10	220	262.00

a. Includes 27,080 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, sex, marital status, and race, December 2002

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All widowed mothers and fathers	193,270	636.70	135,050	680.50	30,900	543.70	25,530	520.30
<i>By age</i>								
Under 20	120	464.10	70	441.10	0	...	50	496.20
20–24	2,650	504.50	1,710	529.00	290	417.60	650	478.70
20	140	389.40	90	484.90	0	...	50	217.40
21	320	453.10	200	480.10	10	119.00	110	434.40
22	500	521.50	330	503.00	50	414.60	120	617.10
23	690	480.30	450	506.20	90	444.00	150	424.40
24	1,000	545.10	640	579.90	140	423.00	220	521.80
25–29	9,200	524.70	6,220	559.70	1,290	417.90	1,670	477.90
25	970	472.70	700	499.70	110	348.90	160	439.70
26	1,560	521.60	960	548.50	260	427.80	340	517.50
27	1,950	528.20	1,280	570.10	270	388.80	400	488.40
28	2,130	535.30	1,420	579.50	300	413.60	400	474.30
29	2,590	534.60	1,860	565.90	350	458.20	370	450.50
30–34	22,100	543.10	14,690	581.80	3,540	450.50	3,670	479.60
30	3,360	498.40	1,920	531.00	680	451.00	710	452.70
31	3,840	550.80	2,550	581.20	630	452.70	640	533.50
32	4,860	532.90	3,280	570.70	710	424.70	830	479.00
33	4,830	559.40	3,470	596.30	690	425.10	620	501.90
34	5,210	560.70	3,470	606.30	830	491.50	870	446.70
35–39	35,960	588.90	24,740	633.50	5,450	492.90	5,450	488.80
35	6,150	565.20	4,020	607.00	1,020	469.60	1,070	505.20
36	6,700	582.80	4,720	617.70	900	491.60	1,040	503.10
37	6,960	569.00	4,720	621.20	1,050	480.20	1,120	435.60
38	7,810	603.20	5,450	651.50	1,150	519.80	1,110	471.10
39	8,340	614.60	5,830	657.60	1,330	498.40	1,110	530.90
40–44	44,880	655.80	32,120	701.20	6,580	553.10	5,760	525.60
40	9,190	629.20	6,600	678.50	1,360	531.70	1,160	471.60
41	8,920	650.40	6,420	692.90	1,240	556.40	1,220	523.00
42	9,090	659.00	6,380	698.10	1,390	581.70	1,210	543.80
43	9,020	670.70	6,510	721.30	1,300	534.40	1,150	546.50
44	8,660	670.60	6,210	716.10	1,290	560.30	1,020	545.20
45–49	36,460	690.10	25,620	738.60	5,920	582.70	4,570	558.90
45	8,320	670.60	5,910	723.70	1,230	568.90	1,120	509.60
46	8,260	683.20	5,620	736.40	1,520	574.80	1,030	564.60
47	7,530	697.10	5,370	738.10	1,170	610.50	920	560.60
48	6,440	707.50	4,560	754.40	1,050	606.40	760	557.90
49	5,910	699.20	4,160	746.20	950	552.60	740	624.20
50–54	20,750	692.80	14,370	734.30	3,680	613.60	2,370	568.00
50	5,450	694.40	3,870	726.30	860	616.20	620	594.90
51	4,820	663.70	3,380	706.70	830	591.10	540	535.00
52	3,920	695.10	2,660	739.90	690	627.10	510	564.30
53	3,430	695.40	2,250	747.20	700	604.80	410	549.20
54	3,130	729.00	2,210	770.50	600	635.80	290	604.70
55–59	11,420	709.90	8,540	738.90	2,040	625.70	750	611.70
55	3,020	734.60	2,250	756.10	560	671.80	180	640.50
56	2,730	694.20	2,120	733.00	380	535.00	200	599.60
57	2,000	696.70	1,410	731.80	420	622.50	160	616.30
58	1,950	697.10	1,460	728.90	350	587.00	120	608.30
59	1,720	721.60	1,300	737.80	330	697.30	90	577.30
60–61	4,000	687.90	2,930	715.80	870	613.40	190	584.40
60	2,000	694.50	1,450	707.20	460	635.70	80	772.70
61	2,000	681.20	1,480	724.30	410	588.40	110	447.50
62 or older	5,730	666.90	4,040	708.80	1,240	566.20	400	569.10
<i>By sex and marital status</i>								
Women	182,140	642.20	127,450	688.00	28,880	543.90	24,100	521.40
Mothers	164,340	643.40	113,520	691.30	26,660	542.70	22,560	524.50
Surviving divorced mothers	17,800	630.70	13,930	660.50	2,220	559.00	1,540	476.00
Men	11,130	546.30	7,600	555.70	2,020	540.40	1,430	502.50

a. Includes 1,790 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by sex, age, marital status, and race, December 2002

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All nondisabled widow(er)s	4,563,660	861.40	4,046,970	882.80	402,300	688.10	102,080	691.20
Women								
Subtotal	4,523,860	863.10	4,016,160	884.40	395,860	688.90	99,610	692.90
<i>By age</i>								
60–61	126,160	845.20	105,040	868.90	14,590	714.50	6,450	756.10
60	53,080	860.30	43,940	886.40	5,750	726.30	3,360	750.70
61	73,080	834.20	61,100	856.40	8,840	706.80	3,090	762.00
62–64	307,950	835.70	260,300	859.30	36,290	709.20	11,050	700.40
62	92,630	844.40	77,500	866.30	11,710	729.30	3,360	747.00
63	101,740	836.30	86,220	860.60	11,630	707.40	3,800	684.50
64	113,580	828.20	96,580	852.60	12,950	692.80	3,890	675.60
65–69	654,870	867.30	561,240	893.40	73,420	714.40	18,600	693.30
65	124,080	869.20	105,380	895.80	14,260	724.50	4,210	705.90
66	128,960	867.80	110,010	895.20	14,530	708.40	4,010	702.60
67	133,690	865.50	114,570	890.70	15,210	715.80	3,620	707.60
68	135,690	870.90	117,110	894.70	14,950	727.50	3,320	682.90
69	132,450	863.20	114,170	890.70	14,470	695.50	3,440	662.00
70–74	733,860	863.60	639,050	888.80	74,820	696.80	17,660	668.60
70	133,820	860.30	114,560	888.90	14,950	689.80	3,900	679.40
71	137,310	865.10	118,890	890.60	14,770	705.10	3,330	675.30
72	150,190	864.70	131,510	888.50	14,710	703.80	3,470	659.10
73	151,420	866.70	132,150	892.80	14,890	684.90	3,750	677.10
74	161,120	861.20	141,940	883.80	15,500	700.20	3,210	649.00
75–79	888,330	856.80	791,790	877.80	75,920	682.00	17,920	672.20
75	171,490	859.10	151,880	880.70	15,370	689.70	3,630	683.40
76	176,190	857.90	155,910	879.00	15,990	690.60	3,740	695.80
77	175,770	855.80	156,530	877.20	15,290	685.20	3,500	651.50
78	184,780	851.80	165,550	872.50	15,000	671.00	3,770	660.20
79	180,100	859.60	161,920	880.00	14,270	672.10	3,280	668.70
80–84	848,530	881.30	770,580	899.90	60,700	680.20	14,350	712.60
80	183,430	865.40	165,040	885.60	14,360	675.70	3,430	684.40
81	187,550	872.20	170,730	889.70	13,340	673.80	2,900	726.10
82	177,290	884.00	161,170	903.00	12,420	675.70	3,080	710.50
83	154,750	888.40	140,180	907.50	11,290	689.90	2,690	736.40
84	145,510	902.20	133,460	919.30	9,290	690.70	2,250	712.30
85–89	566,230	885.50	520,990	901.90	35,180	672.00	8,370	714.50
85	130,030	903.10	119,590	919.70	8,110	693.70	1,970	716.30
86	123,980	889.80	113,190	909.50	8,530	670.00	2,030	702.10
87	114,550	885.20	105,690	899.80	6,810	685.00	1,610	720.90
88	104,210	876.40	96,160	891.20	6,160	657.60	1,490	733.00
89	93,460	865.90	86,360	881.80	5,570	643.70	1,270	701.50
90–94	294,490	839.00	272,670	854.90	17,430	622.20	3,940	667.70
95 or older	103,440	785.30	94,500	802.70	7,510	586.00	1,270	645.40
<i>By marital status</i>								
Widows	4,210,540	862.00	3,748,890	883.40	357,490	682.50	92,620	688.00
Surviving divorced wives (nondisabled)	313,320	876.70	267,270	898.40	38,370	748.40	6,990	757.60
Men								
Subtotal	39,800	668.00	30,810	677.20	6,440	643.10	2,470	621.40
60–61	7,940	644.00	6,420	637.30	930	663.40	590	687.10
62–64	11,430	742.70	9,160	749.00	1,720	723.80	550	698.30
65–69	7,210	733.50	5,330	749.00	1,440	685.40	420	712.20
70–74	4,080	661.40	2,800	697.80	900	600.20	350	541.20
75–79	3,290	594.10	2,380	628.90	610	513.50	290	485.60
80–84	2,410	532.10	1,820	537.20	430	538.70	150	416.50
85–89	1,750	517.50	1,430	521.90	210	541.90	110	413.10
90 or older	1,690	504.70	1,470	507.60	200	468.80	10	809.00

a. Includes 12,310 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by age, sex, marital status, and race, December 2002

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All disabled widow(er)s	205,870	546.20	152,190	565.80	41,880	488.90	11,120	494.20
By age								
50–54	27,080	561.80	18,540	580.10	6,600	515.90	1,840	545.30
50	2,190	578.50	1,350	584.20	650	543.40	190	658.10
51	3,910	560.40	2,680	598.40	960	492.90	250	429.00
52	5,220	564.40	3,500	590.50	1,300	516.70	390	490.50
53	6,950	558.10	4,830	571.70	1,570	500.50	500	607.80
54	8,810	559.70	6,180	571.80	2,120	528.90	510	540.80
55–59	77,430	547.40	57,810	565.40	14,640	493.30	4,750	497.60
55	11,810	552.00	8,680	578.70	2,320	474.00	750	483.00
56	13,180	545.10	9,940	559.60	2,390	502.50	790	493.60
57	14,250	551.80	10,520	573.90	2,810	490.60	910	490.50
58	17,760	545.10	13,170	563.50	3,410	492.10	1,130	492.00
59	20,430	545.40	15,500	557.50	3,710	502.50	1,170	520.70
60–64	101,360	541.20	75,840	562.70	20,640	477.20	4,530	469.90
60	22,270	539.80	16,750	559.20	4,450	476.90	970	487.30
61	21,530	541.20	16,110	567.50	4,490	461.20	900	470.00
62	20,180	544.60	14,920	564.90	4,040	481.90	1,110	489.70
63	19,510	541.00	14,650	562.10	3,920	481.60	880	464.20
64	17,870	539.30	13,410	559.40	3,740	486.90	670	419.20
By sex and marital status								
Women	200,050	551.10	148,260	570.90	40,430	491.90	10,710	499.20
Widows	171,500	551.00	126,820	572.30	35,290	487.60	8,860	498.60
Surviving divorced wives	28,550	551.60	21,440	562.90	5,140	521.30	1,850	502.20
Men	5,820	380.10	3,930	374.30	1,450	405.50	410	363.30

a. Includes 680 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.8—Number and average monthly benefit for parents, by age, sex, and race, December 2002

Age and sex	All races ^a		White		Black		Other ^b	
	Number ^c	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All parents	2,350	770.10	1,310	807.60	250	744.80	740	722.40
By age								
62–64	30	708.90	0	...	10	639.00	20	743.90
65–69	180	890.30	80	975.20	20	1,046.70	70	790.80
70–74	290	758.20	100	815.80	20	1,178.70	170	674.90
75–79	490	801.90	270	799.50	30	813.80	160	810.30
80–84	420	781.90	250	826.20	50	802.30	120	681.00
85–89	430	771.10	230	853.20	20	670.80	180	677.40
90 or older	510	696.80	380	736.10	100	573.60	20	814.00
By sex								
Women	2,030	783.80	1,200	810.40	230	758.30	550	751.60
Men	320	682.80	110	777.40	20	590.00	190	637.80

a. Includes 50 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2002

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Retired workers</i>								
Total	20,889,740	829.70	18,706,390	843.30	1,589,490	726.50	552,480	674.00
62-64	2,578,870	831.10	2,244,160	846.30	228,530	762.70	106,130	656.80
62	689,330	824.00	597,070	839.40	60,380	761.90	31,880	654.30
63	894,860	826.20	775,840	841.00	82,280	763.30	36,720	654.10
64	994,680	840.40	871,250	855.80	85,870	762.60	37,530	661.70
65-69	5,276,710	830.90	4,639,050	846.40	448,160	741.90	188,030	661.60
65	1,184,160	873.30	1,034,260	890.30	101,650	787.30	48,220	689.10
66	1,114,890	838.90	978,520	854.40	93,430	758.30	42,820	660.00
67	1,055,140	818.00	928,390	833.30	91,230	723.00	35,300	661.80
68	995,850	805.50	879,330	820.50	83,920	715.40	32,160	631.40
69	926,670	809.30	818,550	824.10	77,930	713.90	29,530	651.60
70-74	4,523,480	815.70	4,057,730	828.70	343,100	716.00	113,040	661.20
70	945,170	824.20	836,850	838.40	80,180	729.40	27,380	672.80
71	924,750	812.50	828,430	826.10	69,530	715.50	25,410	645.90
72	925,190	810.30	833,240	822.80	67,220	711.00	23,150	655.40
73	865,080	809.30	779,110	822.00	63,890	705.30	19,340	657.00
74	863,290	822.00	780,100	834.30	62,280	715.90	17,760	677.60
75-79	3,823,350	822.40	3,475,580	834.40	261,750	705.70	72,890	688.10
75	850,790	827.30	769,190	840.30	61,190	712.30	17,490	678.40
76	790,790	818.70	718,640	830.60	54,720	705.10	14,700	681.10
77	772,580	833.30	701,590	845.40	53,620	715.40	14,780	705.50
78	733,590	817.80	668,870	829.40	48,870	699.10	13,220	687.20
79	675,600	813.30	617,290	824.50	43,350	692.40	12,700	690.00
80-84	2,629,370	826.00	2,409,690	837.10	166,900	698.60	42,110	705.50
80	629,180	814.60	573,920	825.50	41,470	699.20	11,090	695.50
81	602,070	814.70	552,370	825.70	37,780	686.70	9,730	694.80
82	523,680	815.00	480,450	825.80	33,000	691.80	8,180	691.60
83	450,810	829.40	412,360	841.20	29,660	693.80	6,870	715.30
84	423,630	869.00	390,590	879.90	24,990	729.80	6,240	747.50
85-89	1,395,810	896.90	1,282,380	908.80	87,800	747.70	20,750	802.70
85	365,600	893.70	336,760	904.70	21,800	746.00	5,530	812.10
86	320,030	921.50	293,670	933.80	20,890	772.10	4,340	820.60
87	275,340	904.30	253,970	916.10	16,190	749.40	4,190	800.50
88	236,520	882.90	216,310	896.20	15,830	723.50	3,660	787.80
89	198,320	869.40	181,670	880.40	13,090	738.90	3,030	781.30
90-94	539,410	837.20	489,500	851.60	40,730	680.70	7,860	747.10
95 or older	122,740	773.60	108,300	794.00	12,520	606.10	1,670	689.70
<i>Men</i>								
Subtotal	10,363,740	925.50	9,300,980	943.10	754,410	789.50	291,770	725.80
62-64	1,332,960	990.40	1,157,940	1,018.20	119,180	840.20	55,810	735.20
62	351,270	991.70	304,190	1,020.00	31,150	842.20	15,930	744.90
63	463,130	983.80	400,030	1,012.10	43,430	838.60	19,660	730.70
64	518,560	995.40	453,720	1,022.40	44,600	840.30	20,220	731.80
65-69	2,812,700	961.00	2,474,290	985.40	233,180	813.10	104,210	717.20
65	629,970	1,023.30	550,010	1,051.80	53,340	867.10	26,600	746.60
66	593,910	973.30	520,160	998.90	49,300	830.70	24,350	715.50
67	561,360	945.50	494,900	968.70	46,730	794.90	19,550	719.80
68	531,870	925.60	470,360	948.20	43,560	781.50	17,670	682.60
69	495,590	923.00	438,860	944.70	40,250	775.10	16,040	706.10
70-74	2,408,660	917.80	2,172,020	934.80	172,350	778.30	59,770	715.80
70	504,190	939.90	448,370	959.60	40,840	797.80	14,540	738.00
71	495,980	917.00	446,380	934.70	35,100	779.60	13,660	704.30
72	496,690	909.30	449,450	925.90	34,130	768.00	12,210	704.30
73	459,440	904.10	416,560	919.80	31,530	766.60	10,120	702.00
74	452,360	917.50	411,260	932.90	30,750	774.20	9,240	728.40
75-79	1,908,290	897.70	1,744,780	911.60	120,810	755.70	37,490	724.20
75	437,870	920.20	398,220	936.30	29,190	770.20	9,120	708.20
76	400,520	899.10	366,330	913.40	25,640	751.50	7,580	720.10
77	384,340	913.30	351,180	927.30	24,770	766.10	7,330	755.00
78	357,950	883.80	328,000	896.50	22,150	750.10	6,840	722.30
79	327,610	863.00	301,050	874.60	19,060	732.50	6,620	718.50
80-84	1,193,840	844.40	1,101,070	854.80	68,310	720.60	20,570	716.40
80	301,260	852.90	276,180	864.70	18,490	726.80	5,530	707.60
81	279,180	839.10	257,690	849.70	15,970	709.90	4,730	715.00
82	237,320	818.00	219,070	828.10	13,270	695.60	4,200	694.50
83	197,050	832.10	181,740	841.30	11,440	716.90	3,230	727.80
84	179,030	886.90	166,390	895.90	9,140	767.90	2,880	754.40

(Continued)

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2002—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Men (cont.)</i>								
85-89	522,660	926.90	483,700	936.40	28,050	800.80	9,260	828.90
85	147,480	921.40	137,150	930.50	7,350	785.40	2,490	830.40
86	123,310	959.10	114,120	969.40	6,880	827.40	1,940	844.20
87	101,860	940.60	94,580	950.50	5,200	804.50	1,750	834.20
88	82,830	901.60	75,830	911.00	5,010	792.50	1,700	815.90
89	67,180	890.30	62,020	898.00	3,610	787.90	1,380	814.10
90-94	159,100	836.40	144,750	846.40	10,200	713.10	3,900	787.70
95 or older	25,530	757.60	22,430	771.50	2,330	623.40	760	756.60
<i>Women</i>								
Subtotal	10,526,000	735.40	9,405,410	744.50	835,080	669.60	260,710	616.10
62-64	1,245,910	660.70	1,086,220	663.10	109,350	678.20	50,320	570.00
62	338,060	649.80	292,880	651.80	29,230	676.20	15,950	563.80
63	431,730	657.10	375,810	659.00	38,850	679.20	17,060	565.70
64	476,120	671.60	417,530	674.70	41,270	678.60	17,310	579.80
65-69	2,464,010	682.40	2,164,760	687.60	214,980	664.80	83,820	592.50
65	554,190	702.80	484,250	706.90	48,310	699.10	21,620	618.40
66	520,980	685.60	458,360	690.40	44,130	677.50	18,470	586.90
67	493,780	673.10	433,490	678.80	44,500	647.50	15,750	589.80
68	463,980	667.80	408,970	673.70	40,360	644.20	14,490	569.00
69	431,080	678.50	379,690	684.80	37,680	648.50	13,490	586.80
70-74	2,114,820	699.40	1,885,710	706.60	170,750	653.20	53,270	599.90
70	440,980	692.00	388,480	698.60	39,340	658.40	12,840	599.00
71	428,770	691.70	382,050	699.10	34,430	650.10	11,750	577.90
72	428,500	695.40	383,790	702.10	33,090	652.10	10,940	600.70
73	405,640	702.00	362,550	709.70	32,360	645.60	9,220	607.60
74	410,930	716.90	368,840	724.40	31,530	659.00	8,520	622.40
75-79	1,915,060	747.40	1,730,800	756.60	140,940	662.80	35,400	649.80
75	412,920	728.90	370,970	737.10	32,000	659.60	8,370	645.80
76	390,270	736.20	352,310	744.40	29,080	664.30	7,120	639.50
77	388,240	754.00	350,410	763.20	28,850	671.90	7,450	656.80
78	375,640	755.00	340,870	764.90	26,720	656.80	6,380	649.60
79	347,990	766.50	316,240	776.70	24,290	660.90	6,080	659.00
80-84	1,435,530	810.70	1,308,620	822.30	98,590	683.20	21,540	695.10
80	327,920	779.50	297,740	789.20	22,980	677.00	5,560	683.50
81	322,890	793.60	294,680	804.80	21,810	669.70	5,000	675.60
82	286,360	812.50	261,380	823.80	19,730	689.30	3,980	688.50
83	253,760	827.40	230,620	841.20	18,220	679.40	3,640	704.10
84	244,600	856.00	224,200	868.10	15,850	707.90	3,360	741.50
85-89	873,150	878.90	798,680	892.10	59,750	722.80	11,490	781.70
85	218,120	874.90	199,610	887.00	14,450	725.90	3,040	797.00
86	196,720	897.90	179,550	911.20	14,010	745.00	2,400	801.60
87	173,480	883.00	159,390	895.70	10,990	723.30	2,440	776.30
88	153,690	872.80	140,480	888.20	10,820	691.50	1,960	763.40
89	131,140	858.70	119,650	871.30	9,480	720.30	1,650	753.90
90-94	380,310	837.50	344,750	853.80	30,530	669.80	3,960	707.00
95 or older	97,210	777.80	85,870	799.90	10,190	602.20	910	633.70
<i>Disabled workers</i>								
Total	36,770	1,012.10	29,740	1,048.20	4,930	919.20	2,100	720.50
62	4,340	1,068.90	3,430	1,109.20	600	975.50	310	804.60
63	12,860	1,023.00	10,460	1,054.70	1,600	971.00	800	711.90
64	19,570	992.50	15,850	1,030.60	2,730	876.40	990	701.20
<i>Men</i>								
Subtotal	23,280	1,165.00	19,370	1,204.30	2,620	1,055.20	1,290	797.80
62	2,880	1,207.40	2,370	1,244.50	310	1,128.40	200	891.30
63	8,180	1,185.10	6,720	1,228.90	950	1,087.60	510	789.80
64	12,220	1,141.50	10,280	1,178.90	1,360	1,015.90	580	772.60
<i>Women</i>								
Subtotal	13,490	748.40	10,370	756.50	2,310	764.90	810	597.50
62	1,460	795.70	1,060	806.60	290	812.10	110	646.80
63	4,680	739.50	3,740	741.60	650	800.60	290	575.10
64	7,350	744.60	5,570	756.90	1,370	738.00	410	600.10

(Continued)

5.A OASDI Current-Pay Benefits

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2002—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Spouses								
Total	2,173,280	430.60	2,004,740	438.40	93,470	354.60	69,600	315.60
Wives								
Subtotal	2,162,510	431.60	1,997,200	439.10	91,980	356.40	67,870	318.00
By age								
62-64	303,310	411.50	271,440	422.80	15,950	336.50	15,640	294.10
62	76,220	401.90	68,240	412.70	3,710	331.30	4,200	290.50
63	104,200	407.20	93,280	418.70	5,520	321.50	5,270	297.40
64	122,890	421.00	109,920	432.50	6,720	351.70	6,170	293.80
65-69	607,060	440.00	549,850	450.40	30,670	359.90	25,430	318.50
65	126,950	445.30	113,820	457.40	6,850	369.30	6,140	310.00
66	124,850	443.40	112,710	454.60	6,080	362.40	5,890	318.80
67	123,220	440.80	111,440	451.10	6,470	354.70	5,050	329.20
68	119,090	434.70	108,430	443.30	6,140	368.30	4,200	317.40
69	112,950	435.20	103,450	444.70	5,130	341.00	4,150	319.00
70-74	559,170	436.00	520,010	442.50	23,260	366.40	14,220	319.30
70	116,080	436.80	107,260	444.50	5,280	358.40	3,200	320.50
71	115,470	438.30	107,610	444.80	4,540	376.40	3,010	306.70
72	116,230	436.20	108,020	442.30	5,010	375.00	2,920	322.10
73	107,280	434.30	99,810	441.20	4,370	357.30	2,780	319.90
74	104,110	433.80	97,310	439.40	4,060	364.90	2,310	329.90
75-79	409,290	427.10	385,250	431.90	14,450	356.90	8,120	335.40
75	99,350	435.10	93,610	439.90	3,630	369.30	1,760	329.20
76	87,900	427.70	82,250	433.60	3,380	348.40	1,990	324.20
77	81,610	426.90	76,790	431.30	2,800	359.90	1,740	353.70
78	74,540	419.80	70,410	423.70	2,580	359.70	1,280	336.50
79	65,890	422.70	62,190	427.40	2,060	341.70	1,350	335.10
80-84	211,720	432.70	201,850	436.10	5,530	354.80	3,580	358.30
85-89	61,140	440.90	58,540	444.50	1,680	346.70	760	379.60
90-94	10,210	397.40	9,710	400.10	390	329.30	110	403.10
95 or older	610	421.50	550	413.10	50	500.90	10	484.70
By type of benefit								
Wives of retired workers	2,119,450	434.80	1,960,840	442.10	88,140	360.30	65,140	319.40
Wives of disabled workers	43,060	277.20	36,360	278.20	3,840	267.50	2,730	284.40
Husbands								
Subtotal	10,770	232.70	7,540	234.40	1,490	239.10	1,730	219.80

(Continued)

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2002—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Nondisabled widow(er)s</i>								
Total	2,651,950	788.90	2,305,170	808.60	277,070	656.50	63,570	657.40
60–64	454,350	831.80	381,620	854.70	53,650	709.40	18,690	718.50
60	56,190	849.70	46,440	874.10	6,110	726.10	3,610	745.90
61	77,910	821.40	65,020	842.30	9,410	701.90	3,430	755.00
62	97,020	840.10	80,980	861.40	12,440	730.40	3,540	744.50
63	105,120	833.40	88,930	857.20	12,080	708.70	4,020	686.40
64	118,110	821.80	100,250	846.00	13,610	688.50	4,090	672.80
65–69	548,760	838.20	468,790	863.10	63,400	698.60	15,220	663.00
65	113,670	854.50	96,230	881.10	13,520	718.80	3,720	672.50
66	114,080	845.00	97,330	871.70	12,890	692.00	3,490	672.30
67	112,000	835.30	95,880	859.00	12,940	699.30	2,950	671.80
68	107,450	830.70	92,100	853.70	12,490	701.40	2,590	648.30
69	101,560	823.60	87,250	848.30	11,560	678.30	2,470	640.50
70–74	491,990	808.70	424,960	832.00	54,450	664.10	10,980	636.40
70	97,540	816.60	83,190	842.60	11,370	666.70	2,670	652.00
71	96,050	814.80	82,690	838.40	10,920	669.10	2,200	657.10
72	100,840	810.80	87,620	832.50	10,730	672.60	2,130	633.20
73	98,020	804.60	84,530	829.00	10,900	651.70	2,200	628.00
74	99,540	797.00	86,930	818.00	10,530	660.50	1,780	601.50
75–79	485,760	772.00	427,130	791.30	48,390	628.70	8,840	630.20
75	101,700	789.10	89,030	809.50	10,420	643.50	1,970	644.70
76	100,500	778.40	87,660	797.80	10,590	638.80	1,900	668.20
77	96,280	772.80	84,780	791.70	9,510	633.80	1,750	624.10
78	96,320	760.70	85,070	780.90	9,140	604.50	1,880	613.10
79	90,960	756.80	80,590	774.60	8,730	618.70	1,340	586.80
80–84	369,890	744.80	330,730	761.80	32,420	597.40	5,790	600.40
85–89	189,480	691.80	171,080	706.50	15,400	551.70	2,680	559.90
90–94	85,030	668.90	76,920	682.20	6,930	542.10	1,080	531.90
95 or older	26,690	667.50	23,940	681.40	2,430	547.30	290	555.10

a. Includes 41,380 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2002, selected years

Year	OASDI			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
Number											
1940	222,488	222,488	...	112,331	...	29,749	54,648	20,499	4,437	824	...
1945	1,288,107	1,288,107	...	518,234	...	159,168	390,134	120,581	93,781	6,209	...
1950	3,477,243	3,477,243	...	1,770,984	...	508,350	699,703	169,438	314,189	14,579	...
1955	7,960,616	7,960,616	...	4,473,971	...	1,191,963	1,276,240	291,916	701,360	25,166	...
1957	11,128,897	10,979,047	149,850	6,197,532	149,850	1,827,048	1,502,077	328,309	1,095,137	28,944	...
1960	14,844,589	14,157,138	687,451	8,061,469	455,371	2,345,983	2,000,451	401,358	1,543,843	36,114	...
1965	20,866,767	19,127,716	1,739,051	11,100,584	988,074	2,806,912	3,092,659	471,816	2,371,433	35,289	...
1966	22,767,252	20,796,930	1,970,322	11,658,443	1,097,190	2,860,026	3,392,970	487,755	2,602,015	34,540	634,313
1970	26,228,629	23,563,634	2,664,995	13,349,175	1,492,948	2,951,552	4,122,305	523,136	3,227,160	28,729	533,624
1975	32,084,511	27,732,311	4,352,200	16,588,001	2,488,774	3,320,310	4,972,008	581,845	3,888,705	21,444	223,424
1980	35,584,955	30,906,511	4,678,444	19,562,085	2,858,680	3,477,427	4,606,517	562,316	4,410,515	14,779	92,636
1985	37,058,317	33,151,003	3,907,314	22,431,930	2,656,638	3,374,599	3,319,490	371,659	4,862,805	9,541	31,655
1986	37,702,976	33,707,103	3,995,873	22,980,948	2,728,463	3,386,917	3,294,587	350,546	4,928,019	8,726	24,770
1987	38,189,919	34,145,244	4,044,675	23,439,684	2,785,859	3,380,856	3,243,939	328,838	4,983,846	7,890	19,007
1988	38,627,019	34,552,719	4,074,300	23,858,226	2,830,284	3,366,843	3,203,822	317,761	5,028,822	7,145	14,116
1989	39,151,370	35,022,543	4,128,827	24,326,604	2,895,364	3,364,563	3,165,113	312,079	5,070,873	6,484	10,290
1990	39,832,125	35,566,144	4,265,981	24,838,100	3,011,294	3,366,975	3,187,010	303,923	5,111,482	5,908	7,433
1991	40,592,173	36,079,133	4,513,040	25,288,719	3,194,938	3,370,454	3,268,252	300,661	5,158,383	5,467	5,299
1992	41,507,188	36,617,492	4,889,696	25,757,727	3,467,783	3,382,189	3,391,173	294,176	5,205,375	5,083	3,682
1993	42,245,719	36,992,153	5,253,566	26,104,305	3,725,966	3,367,206	3,527,483	289,350	5,224,279	4,673	2,457
1994	42,883,470	37,299,951	5,583,519	26,407,756	3,962,954	3,337,484	3,653,887	283,072	5,232,379	4,318	1,620
1995	43,387,259	37,529,603	5,857,656	26,672,806	4,185,263	3,289,551	3,734,097	275,020	5,225,519	3,976	1,027
1996	43,736,836	37,664,802	6,072,034	26,898,072	4,385,623	3,194,080	3,802,791	242,135	5,209,812	3,670	653
1997	43,971,086	37,818,047	6,153,039	27,274,572	4,508,134	3,129,129	3,771,774	230,222	5,053,442	3,419	394
1998	44,245,731	37,911,161	6,334,570	27,510,535	4,698,319	3,054,073	3,768,928	220,610	4,989,855	3,186	225
1999	44,595,624	38,071,894	6,523,730	27,774,677	4,879,455	2,987,307	3,794,795	212,401	4,943,915	2,931	143
2000	45,414,794	38,741,432	6,673,362	28,498,945	5,042,334	2,963,326	3,802,863	203,052	4,901,437	2,748	89
2001	45,877,506	38,964,263	6,913,243	28,836,774	5,274,183	2,898,861	3,839,381	197,375	4,828,327	2,564	41
2002	46,444,317	39,233,049	7,221,268	29,190,137	5,543,981	2,832,767	3,910,256	194,117	4,770,638	2,400	21
Total monthly benefits (thousands of dollars)											
1940	4,070	4,070	...	2,539	...	361	668	402	90	11	...
1945	23,801	23,801	...	12,538	...	2,040	4,858	2,391	1,893	81	...
1950	126,857	126,857	...	77,678	...	11,995	19,366	5,801	11,481	535	...
1955	411,613	411,613	...	276,942	...	39,416	46,444	13,403	34,152	1,256	...
1957	605,455	594,552	10,904	400,250	10,904	102,502	57,952	16,102	55,944	6,021	...
1960	936,321	888,320	48,000	596,849	40,668	90,503	93,275	23,795	89,054	2,178	...
1965	1,516,802	1,395,817	120,986	931,532	96,599	120,796	159,428	30,882	174,883	2,683	...
1966	1,638,548	1,502,863	135,685	983,338	107,627	123,262	175,100	31,983	192,821	2,642	21,777
1970	2,628,326	2,385,926	242,400	1,576,551	196,010	175,323	279,845	45,258	328,245	2,965	24,128
1975	5,727,758	5,047,656	680,102	3,436,752	562,180	332,159	544,048	85,676	747,903	3,685	15,354
1980	10,682,791	9,422,206	1,260,585	6,678,216	1,059,792	569,528	864,242	138,426	1,358,836	4,080	9,672
1985	15,901,579	14,441,682	1,459,896	10,736,304	1,285,375	796,351	858,006	123,557	2,094,003	3,609	4,373
1986	16,534,384	15,027,053	1,507,331	11,225,159	1,331,144	816,351	860,953	118,602	2,175,345	3,371	3,459
1987	17,612,946	16,016,257	1,596,689	12,016,444	1,415,811	856,263	883,739	115,966	2,318,748	3,213	2,763
1988	18,691,340	17,008,453	1,682,887	12,806,481	1,498,637	893,521	908,660	116,902	2,461,948	3,061	2,132
1989	20,037,582	18,237,927	1,799,655	13,789,570	1,609,780	944,429	938,538	120,970	2,629,728	2,941	1,627
1990	21,686,763	19,716,655	1,970,108	14,966,531	1,768,313	1,004,852	991,628	124,340	2,827,012	2,849	1,238
1991	23,076,535	20,912,298	2,164,237	15,914,665	1,946,823	1,049,463	1,045,006	127,510	2,989,385	2,767	915
1992	24,442,156	22,033,164	2,408,992	16,810,432	2,171,080	1,089,504	1,100,812	128,748	3,138,250	2,676	655
1993	25,662,445	23,011,870	2,650,575	17,595,964	2,390,829	1,117,643	1,160,403	129,752	3,264,849	2,557	448
1994	26,936,223	24,032,186	2,904,037	18,415,099	2,620,982	1,144,466	1,226,468	131,463	3,394,982	2,459	303
1995	28,148,078	24,993,131	3,154,947	19,199,157	2,853,365	1,164,029	1,283,288	131,430	3,514,262	2,349	197
1996	29,426,079	26,017,474	3,408,605	20,038,023	3,087,223	1,177,458	1,356,685	124,678	3,639,632	2,252	129
1997	30,463,716	26,884,933	3,578,782	20,864,462	3,252,919	1,185,143	1,389,552	122,488	3,646,898	2,173	79
1998	31,298,873	27,519,891	3,778,982	21,449,654	3,444,259	1,179,882	1,417,362	120,247	3,685,349	2,074	46
1999	32,578,327	28,548,030	4,030,297	22,339,070	3,679,691	1,188,814	1,473,988	120,157	3,774,601	1,975	30
2000	34,848,920	30,517,277	4,331,642	24,066,918	3,965,304	1,233,598	1,547,808	120,812	3,912,527	1,934	19
2001	36,504,206	31,823,443	4,680,763	25,215,898	4,295,600	1,246,333	1,624,285	122,526	3,997,687	1,868	9
2002	37,854,453	32,823,008	5,031,445	26,125,090	4,625,445	1,242,317	1,692,471	124,267	4,043,051	1,806	5

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

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A5—Number and average age, by type of benefit, December 2002

Type of benefit	Number ^a (thousands)	Average age
Total, OASDI	46,453	66
OASI	39,232	71
Retired workers	29,204	74
Spouses of retired workers	2,681	72
Children of retired workers	477	24
Under age 18	270	13
Disabled adult children	193	40
Students, aged 18–19	15	18
Children of deceased workers	1,905	22
Under age 18	1,345	12
Disabled adult children	495	47
Students, aged 18–19	66	18
Nondisabled widow(er)s	4,564	77
Widowed mothers and fathers	193	43
Disabled widow(er)s	206	59
Parents of deceased workers	2	82
DI	7,220	43
Disabled workers	5,536	51
Spouses of disabled workers	151	50
Children of disabled workers	1,533	12
Under age 18	1,427	12
Disabled adult children	61	27
Students, aged 18–19	45	18

a. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A6—Number and average monthly benefit, by age, sex, type of benefit, and race, December 2002

Type of benefit	All races ^a	White	Black	Other ^b
Number ^c (thousands)				
Total, OASDI	46,453	39,417	4,784	2,098
<i>By age and sex</i>				
Adults	42,537	36,790	3,937	1,686
Men	18,272	15,777	1,643	801
Women	24,265	21,013	2,294	885
Children	3,916	2,628	848	413
Under age 18	3,042	1,953	687	378
Disabled adult children	749	590	132	25
Students, aged 18–19	125	86	28	10
<i>By type of benefit</i>				
Retired workers and their spouses and children	32,362	28,673	2,594	1,020
Retired workers	29,204	25,883	2,371	883
Spouses	2,681	2,440	128	106
Children	477	350	95	31
Disabled workers and their spouses and children	7,220	5,142	1,283	749
Disabled workers	5,536	4,017	945	539
Spouses	151	114	19	18
Children	1,533	1,012	319	192
Survivors of deceased workers	6,870	5,602	908	329
Nondisabled widow(er)s	4,564	4,047	402	102
Disabled widow(er)s	206	152	42	11
Widowed mothers and fathers	193	135	31	26
Children	1,905	1,267	433	189
Parents	2	1	0	1
Average monthly benefit (dollars)				
Retired workers	895.00	911.70	774.80	733.10
Men	1,008.10	1,029.80	848.40	789.60
Women	773.90	784.00	707.50	661.30
Disabled workers	834.10	860.30	775.40	745.30
Men	935.00	973.00	834.50	820.30
Women	708.60	715.60	709.80	656.00
Widowed mothers and fathers	636.70	680.50	543.70	520.30
Nondisabled widow(er)s	861.40	882.80	688.10	691.20
Surviving children	584.20	629.80	491.10	492.90

a. Includes 152,770 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A7—Number and average monthly benefit for women, by type of benefit, basis of entitlement, and race, December 2002

Type of benefit and basis of entitlement	All races ^a		White		Black		Other ^b	
	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)
All women								
Total ^c	24,263	742.80	21,012	755.50	2,293	677.00	884	611.20
Workers	16,563	764.10	14,190	775.50	1,687	708.10	635	659.30
Retired	14,096	773.90	12,430	784.00	1,239	707.50	389	661.30
Full benefit	3,570	887.40	3,025	906.70	404	785.90	128	753.40
Reduced benefit	10,526	735.40	9,405	744.50	835	669.60	261	616.10
Disabled	2,467	708.60	1,760	715.60	447	709.80	246	656.00
Wives of retired and disabled workers	2,794	441.70	2,530	453.10	141	352.20	115	303.00
Entitlement based on care of children	151	240.80	112	257.80	20	215.00	19	169.90
Husband retired	53	360.90	42	378.90	6	324.40	5	252.00
Husband disabled	98	175.90	70	185.50	13	161.40	14	143.70
Entitlement based on age	2,643	453.20	2,418	462.20	122	374.50	96	329.10
Husband retired	2,594	456.30	2,377	465.20	117	378.30	93	330.50
Full benefit	472	553.50	414	575.00	29	434.60	28	356.60
Reduced benefit	2,122	434.70	1,963	442.00	88	360.10	65	319.50
Husband disabled	49	286.50	41	287.80	5	278.20	3	287.20
Widows	4,906	842.10	4,292	867.70	465	662.80	134	646.70
Entitlement based on care of children	182	642.20	127	688.00	29	543.90	24	521.40
Nondisabled, aged 60 or older	4,524	863.10	4,016	884.40	396	688.90	100	692.90
Disabled, aged 50–64	200	551.10	148	570.90	40	491.90	11	499.20
Women aged 65 or older								
Total ^c	19,276	762.40	17,139	773.90	1,580	683.00	501	622.60
Entitled as worker	12,850	784.80	11,344	795.50	1,130	710.40	338	674.90
Worker only	7,177	754.70	6,109	769.00	795	679.60	254	652.50
Dually entitled	5,673	822.90	5,235	826.50	335	783.30	85	742.10
Wife's benefit	2,269	534.90	2,145	537.40	80	480.30	38	505.70
Widow's benefit	3,404	1,014.90	3,090	1,027.20	255	878.50	47	933.10
Entitled as wife or widow only	6,426	717.70	5,795	731.50	450	614.20	162	513.50
Wife's benefit	2,337	458.70	2,144	467.30	105	380.50	80	335.90
Widow's benefit	4,090	865.70	3,651	886.60	345	685.70	82	686.90

a. Includes 73,000 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Excludes parents, special age-72 beneficiaries, and disabled adult children receiving benefits because of a childhood disability.

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A8—Number, average primary insurance amount, and average monthly benefit for persons with benefits based on special minimum primary insurance amount, by type of benefit and sex, December 2002

Type of benefit and sex	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
All beneficiaries	127,685	539.71	625.42
Retirement benefits			
Retired workers	114,789	536.87	651.62
Men	25,536	519.09	460.24
Women	89,253	541.96	706.37
Wives and husbands of retired workers	3,711	521.97	212.62
Children of retired workers	460	534.57	215.91
Disability benefits			
Disabled workers	12	542.14	540.60
Children of disabled workers	2	625.60	312.00
Survivor benefits			
Nondisabled widow(er)s	7,220	584.55	492.38
Disabled widow(er)s	219	582.00	367.42
Widowed mothers and fathers	43	585.55	385.81
Children of deceased workers	1,229	587.67	415.89

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A10—Number and average monthly benefit for beneficiaries aged 60 or older, by sex, type of benefit, and age, December 2002

Type of benefit	Total, 60 or older ^a	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90–94	95 or older ^b
Number (thousands)										
<i>All beneficiaries</i>										
Total ^c	37,937	719	4,043	8,981	8,070	6,967	4,987	2,737	1,115	318
Retired workers	29,204	...	2,579	7,568	6,614	5,525	3,838	2,070	798	212
Widow(er)s, parents, and mothers and fathers	4,677	182	382	663	738	892	851	568	296	104
Wives and husbands	2,692	6	315	725	699	537	292	96	20	2
Disabled workers	1,260	515	746	...	...	...	...	...	...	...
Disabled adult children	104	17	21	26	18	12	6	2	1	^d
<i>Men</i>										
Subtotal	15,951	306	1,786	4,227	3,634	2,902	1,877	876	284	59
Retired workers	15,108	...	1,333	4,198	3,611	2,886	1,869	872	281	59 ^d
Widowers, parents, and fathers	43	9 ^d	13	7	4	3	2	2	1	^d
Husbands	36	^d	2	9	10	8	4	2	1	^d
Disabled workers	715	288	427	...	...	...	...	...	...	...
Disabled adult children	49	8	11	13	9	5	2	1	^d	^d
<i>Women</i>										
Subtotal	21,987	414	2,258	4,754	4,437	4,064	3,110	1,861	831	258
Retired workers	14,096	...	1,246	3,369	3,004	2,639	1,969	1,198	517	153
Widows, parents, and mothers	4,634	173	370	655	734	889	849	567	295	104
Wives	2,656	6	313	716	689	529	288	94	19	2
Disabled workers	545	227	319	...	...	...	...	...	...	...
Disabled adult children	55	9	10	13	10	7	4	1	^d	^d
Average monthly benefit (dollars)										
<i>All beneficiaries</i>										
Total ^c	858.10	866.10	808.20	855.40	848.00	853.90	865.80	953.80	894.80	831.00
Retired workers	895.00	...	831.10	894.20	889.00	893.50	893.90	994.80	926.60	857.30
Widow(er)s, parents, and mothers and fathers	854.00	759.60	786.50	865.70	862.40	855.70	880.30	884.30	837.30	784.40
Wives and husbands	450.10	380.20	409.40	451.90	453.40	451.80	462.70	495.90	480.90	463.30
Disabled workers	916.80	918.70	915.50	...	...	...	...	...	...	...
Disabled adult children	537.50	584.10	576.00	542.70	514.40	486.10	471.80	426.90	409.30	^d
<i>Men</i>										
Subtotal	1,007.20	1,053.80	1,006.20	1,027.00	1,003.80	990.50	951.90	1,090.60	1,006.80	937.00
Retired workers	1,008.10	...	990.40	1,030.60	1,007.50	993.90	954.50	1,094.30	1,012.30	940.30 ^d
Widowers, parents, and fathers	651.60	607.60 ^d	709.30	735.40	662.10	592.00	530.70	521.20	508.00	^d
Husbands	253.20	^d	206.20	254.40	259.70	249.00	249.60	263.20	283.50	^d
Disabled workers	1,080.10	1,082.10	1,078.70	...	...	...	...	...	...	...
Disabled adult children	542.30	587.90	578.40	540.20	513.10	486.30	459.10	461.30	^d	^d
<i>Women</i>										
Subtotal	750.00	727.40	651.70	702.80	720.40	756.30	813.90	889.30	856.60	806.70
Retired workers	773.90	...	660.70	724.30	746.60	783.60	836.50	922.40	880.10	825.30
Widows, parents, and mothers	855.90	767.80	789.10	867.20	863.60	856.70	881.30	885.50	838.90	785.00
Wives	452.80	381.80	410.50	454.30	456.40	455.10	465.60	500.90	491.70	479.90
Disabled workers	702.80	711.10	696.90	...	...	...	...	...	...	...
Disabled adult children	533.40	580.30	573.40	545.00	515.60	486.00	478.50	410.70	^d	^d

a. The sum of the individual categories may not equal total because of independent rounding.

b. Includes 40,080 persons aged 100 or older—5,800 men and 34,280 women.

c. Includes special age-72 beneficiaries.

d. Fewer than 500 beneficiaries.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A14—Number and percentage distribution of women aged 62 or older, by basis of entitlement, type of benefit, and dual entitlement status, December 1960–2002, selected years

Entitlement	1960	1970	1975	1980	1985	1990	1995	2000	2002
<i>Number (thousands)</i>									
All women 62 or older ^a	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,381	21,520
Entitled as worker ^b	2,866	5,753	7,586	9,304	10,805	12,037	12,974	14,013	14,409
Worker only	2,563	4,786	5,926	6,710	7,096	7,359	7,554	8,117	8,392
Dually entitled ^c	303	967	1,660	2,594	3,709	4,678	5,420	5,896	6,016
Wife's benefit	159	388	617	1,016	1,594	2,077	2,398	2,568	2,592
Widow's benefit	141	574	1,039	1,575	2,112	2,600	3,022	3,327	3,424
Entitled as wife or widow only ^c	3,753	5,621	6,424	7,046	7,607	7,917	7,914	7,368	7,111
Wife's benefit	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,768	2,650
Widow's benefit ^d	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,598	4,459
<i>Percentage distribution</i>									
All women 62 or older ^a	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Entitled as worker ^b	43.3	50.6	54.1	56.9	58.7	60.3	62.1	65.5	67.0
Worker only	38.7	42.1	42.3	41.0	38.5	36.9	36.2	38.0	39.0
Dually entitled ^c	4.6	8.5	11.8	15.9	20.1	23.4	25.9	27.6	28.0
Wife's benefit	2.4	3.4	4.4	6.2	8.7	10.4	11.5	12.0	12.0
Widow's benefit	2.1	5.0	7.4	9.6	11.5	13.0	14.4	15.6	15.9
Entitled as wife or widow only ^c	56.7	49.4	45.9	43.1	41.3	39.7	37.9	34.5	33.0
Wife's benefit	32.8	22.4	19.6	17.6	16.4	15.3	14.3	12.9	12.3
Widow's benefit ^d	23.4	26.8	26.1	25.4	24.9	24.3	23.6	21.5	20.7

a. Excludes special age-72 beneficiaries and disabled adult children.

b. Includes disabled workers.

c. Includes parents. Excludes dually entitled disabled workers.

d. Includes disabled widows and mothers.

SOURCE: Social Security Administration, Master Beneficiary Record. Dual entitlement data for 1995, 2000, and 2002 are based on a 10 percent sample. All other years are 100 percent data.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A15—Number and average monthly benefit for women aged 65 or older, by basis of entitlement, type of benefit, and dual entitlement status, December 2002

Entitlement	Total	65–69	70–74	75–79	80–84	85–89	90 or older
<i>Number</i>							
All women 65 or older ^a	19,276,310	4,740,040	4,426,680	4,056,400	3,105,800	1,858,810	1,088,580
Entitled as worker	12,849,900	3,369,190	3,003,760	2,639,210	1,969,240	1,198,210	670,290
Worker only	7,177,040	2,256,960	1,767,630	1,358,220	873,780	583,050	337,400
Dually entitled	5,672,860	1,112,230	1,236,130	1,280,990	1,095,460	615,160	332,890
Wife's benefit	2,268,780	804,270	671,770	475,900	243,690	61,650	11,500
Widow's benefit	3,404,080	307,960	564,360	805,090	851,770	553,510	321,390
Entitled as wife or widow only	6,426,410	1,370,850	1,422,920	1,417,190	1,136,560	660,600	418,290
Wife's benefit	2,336,660	715,980	689,060	528,860	288,030	94,370	20,360
Widow's benefit	4,089,750	654,870	733,860	888,330	848,530	566,230	397,930
<i>Average monthly benefit (dollars)</i>							
All women 65 or older ^a	762.40	703.30	720.80	756.80	814.30	889.70	845.00
Entitled as worker	784.80	724.30	746.60	783.60	836.50	922.40	867.60
Worker only	754.70	744.50	738.20	738.40	741.50	865.40	818.30
Dually entitled	822.90	683.30	758.60	831.60	912.30	976.30	917.60
Wife's benefit	534.90	548.90	531.10	518.60	522.20	563.10	564.50
Widow's benefit	1,014.90	1,034.10	1,029.40	1,016.60	1,023.80	1,022.40	930.20
Entitled as wife or widow only	717.70	651.60	666.40	706.90	776.00	830.60	808.80
Wife's benefit	458.70	454.30	456.40	455.10	465.60	500.90	490.70
Widow's benefit	865.70	867.30	863.60	856.80	881.30	885.50	825.10

a. Excludes parents, special age-72 beneficiaries, and disabled adult children.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A16—Number and average monthly benefit for adult beneficiaries, by sex, type of benefit, and age, December 2002

Type of benefit	Number (thousands)				Average monthly benefit (dollars)			
	All ages	Under 62	62–64	65 or older	All ages	Under 62	62–64	65 or older
All adult beneficiaries								
Total ^a	43,279	6,076	4,044	33,159	845.03	766.31	808.62	863.89
Retired workers	29,190	...	2,585	26,605	895.00	...	831.46	901.17
Disabled workers	5,544	4,799	745	...	834.32	821.73	915.38	...
Wives and husbands of retired workers	2,681	46	285	2,350	451.34	352.08	422.42	456.80
Wives and husbands of disabled workers	152	100	29	22	212.44	174.81	279.16	292.74
Nondisabled widow(er)s	4,563	135	315	4,113	861.09	829.66	834.33	864.17
Disabled widow(er)s	207	149	58	...	548.07	550.17	541.27	...
Mothers and fathers	194	188	5	^b	640.17	639.01	684.03	613.97
Disabled adult children	745	658	21	65	550.43	553.52	562.86	512.67
Men								
Subtotal	18,673	3,037	1,789	13,847	983.13	865.45	1,006.37	1,005.94
Retired workers	15,100	...	1,338	13,762	1,007.81	...	990.91	1,009.45
Disabled workers	3,070	2,644	426	...	935.60	912.64	1,078.16	...
Husbands of retired workers	35	^b	1	34	256.10	260.12	222.81	257.37
Husbands of disabled workers	4	2	1	2	168.48	136.13	163.77	208.24
Nondisabled widowers	39	8	11	20	662.75	630.56	732.22	638.00
Disabled widowers	6	5	1	...	384.67	388.34	370.22	...
Fathers	11	10	^b	^b	547.43	547.10	576.11	313.00
Disabled adult children	407	368	10	29	548.10	550.51	548.81	510.60
Women								
Subtotal	24,606	3,039	2,255	19,312	740.23	667.22	651.74	762.05
Retired workers	14,090	...	1,247	12,843	774.90	...	660.27	785.14
Disabled workers	2,474	2,155	319	...	708.63	710.16	698.30	...
Wives of retired workers	2,646	46	284	2,316	453.93	352.18	423.33	459.71
Wives of disabled workers	147	98	29	21	213.67	175.59	281.16	299.50
Nondisabled widows	4,524	127	304	4,093	862.81	842.39	838.01	865.29
Disabled widows	201	145	57	...	553.03	556.17	545.00	...
Mothers	183	178	5	^b	645.53	644.42	686.92	615.32
Disabled adult children	338	291	10	37	553.24	557.32	577.34	514.29

a. Includes parents and special age-72 beneficiaries. Excludes 122,698 student beneficiaries aged 18–19.

b. Fewer than 500 beneficiaries.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Angela Y. Harper (410) 966-9541.

Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2002

Year	Number				Average monthly benefit (dollars)		
	All disabled beneficiaries	Workers	Disabled adult children	Widow(er)s	Workers	Disabled adult children	Widow(er)s
1957	178,719	149,850	28,869	...	72.76	38.62	...
1958	284,744	237,719	47,025	...	82.10	39.62	...
1959	416,896	334,443	82,453	...	89.00	42.96	...
1960	559,425	455,371	104,054	...	89.31	44.15	...
1961	742,296	618,075	124,221	...	89.59	45.28	...
1962	888,131	740,867	147,264	...	89.99	45.67	...
1963	993,656	827,014	166,642	...	90.59	46.45	...
1964	1,077,695	894,173	183,522	...	91.12	47.35	...
1965	1,186,464	988,074	198,390	...	97.76	51.77	...
1966	1,310,911	1,097,190	213,721	...	98.09	52.42	...
1967	1,422,778	1,193,120	229,658	...	98.43	53.41	...
1968	1,560,517	1,295,300	243,654	21,563	111.86	61.83	72.25
1969	1,690,982	1,394,291	257,222	39,469	112.74	62.79	71.02
1970	1,812,786	1,492,948	270,557	49,281	131.26	73.21	82.00
1971	1,990,098	1,647,684	285,671	56,743	146.52	81.37	90.11
1972	2,202,090	1,832,916	305,007	64,167	179.32	98.81	109.54
1973	2,415,383	2,016,626	319,988	78,769	183.00	100.14	111.14
1974	2,670,092	2,236,882	341,082	92,128	205.70	112.45	125.87
1975	2,960,620	2,488,774	362,335	109,511	225.90	122.80	137.70
1976	3,171,198	2,670,208	381,563	119,427	245.17	132.32	147.01
1977	3,368,954	2,837,432	404,246	127,276	265.30	142.12	156.11
1978	3,429,421	2,879,774	419,896	129,751	288.30	153.66	165.46
1979	3,435,761	2,870,590	435,338	129,833	322.00	171.55	180.52
1980	3,436,429	2,858,680	450,169	127,580	370.70	198.95	205.02
1981	3,361,130	2,776,519	463,021	121,590	413.20	224.51	226.58
1982	3,192,379	2,603,599	472,408	116,372	440.60	245.07	242.11
1983	3,168,992	2,569,029	488,372	111,591	456.20	257.78	250.33
1984	3,212,040	2,596,516	506,373	109,151	470.70	270.28	306.24
1985	3,289,485	2,656,638	525,842	107,005	483.80	281.92	315.26
1986	3,380,480	2,728,463	545,043	106,974	487.90	288.79	319.74
1987	3,453,414	2,785,859	561,273	106,282	508.20	304.32	333.89
1988	3,507,707	2,830,284	574,300	103,123	529.50	320.21	348.05
1989	3,583,451	2,895,364	586,457	101,630	556.00	339.47	366.72
1990	3,712,763	3,011,294	600,480	100,989	587.20	361.71	388.93
1991	3,925,472	3,194,938	616,045	114,489	609.40	378.86	406.96
1992	4,236,080	3,467,783	636,973	131,324	626.10	393.61	422.65
1993	4,529,466	3,725,966	656,485	147,015	641.70	407.20	434.20
1994	4,796,313	3,962,954	672,683	160,676	661.40	422.40	446.30
1995	5,044,388	4,185,263	686,101	173,024	681.80	437.30	458.30
1996	5,264,321	4,385,623	696,787	181,911	703.90	454.30	471.00
1997	5,400,781	4,508,134	704,709	187,938	721.60	468.60	480.40
1998	5,605,272	4,698,319	712,772	194,181	733.10	479.40	487.30
1999	5,798,776	4,879,455	720,526	198,795	754.10	495.60	499.90
2000	5,972,450	5,042,334	728,689	201,427	786.40	518.30	519.70
2001	6,214,972	5,274,183	736,546	204,243	814.50	537.60	536.70
2002	6,495,868	5,543,981	744,529	207,358	834.30	550.40	548.10

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Angela Y. Harper (410) 966-9541.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B1—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and with delayed retirement credit, by age and sex, December 2002

Age	All retired workers			Men			Women		
	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
Total	3,917,750	1,114.50	1,206.70	2,411,930	1,237.80	1,318.10	1,505,820	917.10	1,028.20
66-69	470,850	1,112.00	1,165.30	306,180	1,228.20	1,277.00	164,670	896.00	957.80
66	17,270	955.50	983.50	10,220	1,045.50	1,065.30	7,050	824.90	864.90
67	28,840	897.80	942.20	16,820	977.20	1,011.20	12,020	786.70	845.60
68	210,380	1,140.80	1,179.80	139,410	1,253.90	1,287.00	70,970	918.50	969.20
69	214,360	1,125.20	1,195.80	139,730	1,246.00	1,314.40	74,630	899.00	973.80
70-74	1,094,430	1,094.80	1,202.80	674,270	1,232.40	1,338.70	420,160	874.00	984.60
70	222,020	1,124.20	1,217.20	137,600	1,261.50	1,352.40	84,420	900.30	996.80
71	223,420	1,093.10	1,202.50	137,660	1,230.00	1,339.50	85,760	873.30	982.70
72	224,830	1,082.70	1,194.20	138,450	1,221.70	1,333.40	86,380	859.90	971.10
73	213,080	1,074.70	1,193.10	130,110	1,211.00	1,328.00	82,970	861.00	981.50
74	211,080	1,099.00	1,206.80	130,450	1,237.20	1,339.80	80,630	875.50	991.60
75-79	974,130	1,094.40	1,195.70	610,200	1,218.90	1,307.10	363,930	885.50	1,009.00
75	207,480	1,109.70	1,219.30	128,850	1,244.10	1,346.90	78,630	889.40	1,010.30
76	205,660	1,095.10	1,192.20	128,800	1,220.60	1,306.10	76,860	884.70	1,001.40
77	182,460	1,117.40	1,224.10	113,530	1,246.10	1,342.80	68,930	905.30	1,028.60
78	195,200	1,084.40	1,178.10	122,930	1,205.30	1,281.40	72,270	878.80	1,002.30
79	183,330	1,064.10	1,163.50	116,090	1,177.00	1,256.10	67,240	869.00	1,003.50
80-84	730,360	1,058.70	1,165.50	455,710	1,166.80	1,249.00	274,650	879.20	1,026.80
80	169,630	1,053.50	1,157.60	107,450	1,162.60	1,245.00	62,180	865.10	1,006.60
81	165,380	1,042.30	1,146.10	103,560	1,151.80	1,232.20	61,820	858.80	1,002.00
82	152,400	1,031.80	1,139.90	95,970	1,136.60	1,216.90	56,430	853.60	1,008.90
83	127,300	1,060.10	1,168.60	79,200	1,164.20	1,247.20	48,100	888.60	1,039.30
84	115,650	1,123.40	1,235.00	69,530	1,240.20	1,327.00	46,120	947.20	1,096.40
85-89	412,420	1,304.00	1,370.60	245,600	1,432.10	1,478.70	166,820	1,115.40	1,211.40
85	103,740	1,160.50	1,270.60	63,440	1,281.90	1,368.20	40,300	969.40	1,116.90
86	89,590	1,397.70	1,448.50	53,730	1,533.30	1,566.30	35,860	1,194.60	1,272.10
87	81,540	1,368.80	1,419.10	48,720	1,504.00	1,537.20	32,820	1,168.00	1,243.80
88	75,000	1,328.20	1,381.30	43,560	1,454.30	1,486.40	31,440	1,153.50	1,235.60
89	62,550	1,294.20	1,349.00	36,150	1,421.60	1,454.60	26,400	1,119.70	1,204.40
90 or older	235,560	1,136.10	1,194.20	119,970	1,260.80	1,297.70	115,590	1,006.60	1,086.70

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B2—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and without delayed retirement credit, by age and sex, December 2002

Age	All retired workers			Men			Women		
	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
Total	4,396,090	873.20	927.70	2,332,130	1,053.60	1,054.30	2,063,960	669.30	784.60
65-69	1,820,090	981.60	1,007.70	1,079,580	1,142.30	1,142.00	740,510	747.40	811.90
65	429,720	1,058.50	1,076.50	261,980	1,220.60	1,220.00	167,740	805.40	852.40
66	436,740	1,020.70	1,043.10	266,220	1,174.00	1,173.60	170,520	781.20	839.30
67	448,140	1,004.80	1,028.10	273,110	1,156.70	1,156.50	175,030	767.80	827.90
68	268,810	869.00	906.30	147,800	1,031.90	1,032.00	121,010	670.10	752.70
69	236,680	853.90	894.10	130,470	1,015.30	1,015.40	106,210	655.70	745.30
70-74	996,390	823.50	877.20	527,620	993.20	993.50	468,770	632.50	746.20
70	226,550	847.00	892.20	121,480	1,011.90	1,012.10	105,070	656.20	753.60
71	208,490	833.60	883.00	112,040	1,000.10	1,000.30	96,450	640.20	746.80
72	199,620	818.70	872.40	106,290	984.60	985.10	93,330	629.70	744.10
73	183,750	805.70	865.70	96,150	977.40	978.00	87,600	617.40	742.50
74	177,980	805.40	868.50	91,660	986.20	986.90	86,320	613.40	742.70
75-79	727,390	785.00	861.90	367,180	972.00	973.50	360,210	594.40	748.10
75	165,030	803.50	869.20	85,840	984.40	985.40	79,190	607.40	743.20
76	154,020	792.50	866.00	80,670	976.60	977.80	73,350	590.10	743.10
77	147,790	798.00	872.20	74,890	988.00	989.40	72,900	602.80	751.70
78	136,750	768.50	854.80	66,600	959.70	961.30	70,150	586.90	753.60
79	123,800	753.90	842.50	59,180	941.70	943.80	64,620	582.00	749.70
80-84	478,070	756.00	852.70	219,020	939.40	941.90	259,050	600.90	777.30
80	113,050	751.00	844.50	53,340	936.80	938.20	59,710	584.90	760.70
81	108,810	755.80	851.30	51,450	939.10	942.00	57,360	591.50	770.00
82	96,210	739.90	839.40	44,470	919.20	922.60	51,740	585.70	767.90
83	82,090	754.30	852.40	35,770	944.20	946.10	46,320	607.60	780.10
84	77,910	785.00	883.20	33,990	965.20	968.30	43,920	645.50	817.30
85-89	261,620	825.60	924.50	103,380	1,023.50	1,027.00	158,240	696.20	857.50
85	68,190	805.90	905.10	28,920	1,001.60	1,004.80	39,270	661.80	831.70
86	59,470	865.90	954.30	24,580	1,068.40	1,069.90	34,890	723.20	872.90
87	52,930	838.80	937.50	20,530	1,035.80	1,040.90	32,400	714.00	872.00
88	46,190	809.40	912.50	17,200	1,000.90	1,004.30	28,990	695.80	858.10
89	34,840	796.50	907.40	12,150	996.20	1,001.30	22,690	689.60	857.10
90 or older	112,530	737.10	831.70	35,350	891.20	899.20	77,180	666.50	800.70

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B3—Number and average monthly benefit before and after delayed retirement credit, by age and sex, December 2002

Age	All retired workers			Men			Women		
	Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)	
		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit
Total	4,557,500	1,156.00	1,176.70	2,724,900	1,267.70	1,290.40	1,832,600	989.80	1,007.50
66-69	500,400	1,149.20	1,157.20	323,800	1,261.50	1,270.30	176,600	943.20	949.80
66	17,800	1,029.40	1,033.50	11,100	1,132.70	1,137.30	6,700	858.20	861.70
67	28,900	931.90	937.40	16,300	1,007.60	1,013.60	12,600	834.00	839.00
68	210,300	1,169.50	1,175.20	140,600	1,276.20	1,282.30	69,700	954.30	959.20
69	243,400	1,166.10	1,176.70	155,800	1,283.90	1,295.70	87,600	956.60	965.00
70-74	1,273,300	1,153.40	1,173.00	769,700	1,285.70	1,307.30	503,600	951.30	967.60
70	246,200	1,182.90	1,199.00	151,200	1,308.60	1,325.70	95,000	982.90	997.20
71	257,300	1,155.60	1,174.60	154,400	1,289.10	1,310.00	102,900	955.10	971.50
72	272,000	1,142.80	1,163.10	167,300	1,272.00	1,294.80	104,700	936.30	952.70
73	248,500	1,142.90	1,163.90	149,300	1,271.20	1,294.70	99,200	949.70	967.10
74	249,300	1,144.30	1,165.40	147,500	1,288.80	1,312.70	101,800	934.90	952.00
75-79	1,134,700	1,137.10	1,158.60	686,400	1,250.50	1,274.20	448,300	963.40	981.70
75	244,800	1,172.90	1,194.30	150,900	1,302.50	1,326.30	93,900	964.70	982.30
76	237,000	1,133.40	1,153.30	143,600	1,236.80	1,257.90	93,400	974.40	992.40
77	216,000	1,150.00	1,172.30	126,200	1,276.50	1,301.60	89,800	972.30	990.50
78	230,000	1,119.30	1,141.20	139,600	1,231.50	1,255.80	90,400	946.10	964.40
79	206,900	1,105.30	1,127.50	126,100	1,199.10	1,223.10	80,800	958.90	978.30
80-84	869,000	1,109.60	1,132.90	523,400	1,190.80	1,216.20	345,600	986.70	1,006.70
80	201,400	1,103.00	1,127.00	123,600	1,182.40	1,208.40	77,800	977.00	997.60
81	196,300	1,080.70	1,103.00	117,400	1,169.90	1,194.30	78,900	947.90	967.10
82	177,500	1,079.20	1,101.20	107,200	1,149.40	1,173.20	70,300	972.10	991.30
83	153,200	1,130.20	1,154.10	94,500	1,208.40	1,234.80	58,700	1,004.10	1,024.20
84	140,600	1,175.60	1,200.10	80,700	1,268.40	1,295.30	59,900	1,050.60	1,071.70
85-89	492,800	1,307.40	1,334.10	279,400	1,432.10	1,462.30	213,400	1,144.10	1,166.20
85	120,800	1,201.20	1,224.50	69,100	1,312.70	1,338.10	51,700	1,052.10	1,072.50
86	107,200	1,385.50	1,414.10	60,900	1,525.60	1,558.40	46,300	1,201.20	1,224.40
87	99,600	1,348.60	1,375.60	56,000	1,479.40	1,510.40	43,600	1,180.50	1,202.40
88	93,000	1,333.50	1,362.80	53,500	1,461.70	1,496.00	39,500	1,159.90	1,182.40
89	72,200	1,278.50	1,304.60	39,900	1,389.80	1,418.30	32,300	1,141.10	1,164.10
90 or older	287,300	1,133.90	1,160.50	142,200	1,227.80	1,259.20	145,100	1,041.80	1,063.70

SOURCE: Social Security Administration, Master Beneficiary Record, 1 percent sample.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2002

Year of entitlement	All retired workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	29,203,660	100.0	...	895.00	15,107,850	100.0	...	1,008.10	14,095,810	100.0	...	773.90
2000–2002	5,138,950	17.6	...	926.50	2,833,370	18.8	...	1,079.40	2,305,580	16.4	...	738.50
1995–1999	7,275,110	24.9	...	884.20	3,935,110	26.0	...	1,016.80	3,340,000	23.7	...	728.00
1990–1994	6,257,870	21.4	...	884.50	3,431,880	22.7	...	997.50	2,825,990	20.0	...	747.20
1985–1989	4,986,680	17.1	...	872.70	2,573,230	17.0	...	959.20	2,413,450	17.1	...	780.50
1980–1984	3,254,990	11.1	...	910.10	1,515,930	10.0	...	970.90	1,739,060	12.3	...	857.10
1975–1979	1,604,630	5.5	...	943.60	623,990	4.1	...	1,017.10	980,640	7.0	...	896.80
1970–1974	568,430	1.9	...	859.40	170,000	1.1	...	896.10	398,430	2.8	...	843.70
1965–1969	104,720	0.4	...	800.90	22,380	0.1	...	839.30	82,340	0.6	...	790.40
Before 1965	12,280	^b	...	708.30	1,960	^b	...	705.50	10,320	0.1	...	708.80
2002	1,669,660	5.7	5.7	932.90	914,890	6.1	6.1	1,093.40	754,770	5.4	5.4	738.30
2001	1,665,090	5.7	11.4	913.20	912,820	6.0	12.1	1,062.10	752,270	5.3	10.7	732.50
2000	1,804,200	6.2	17.6	932.70	1,005,660	6.7	18.8	1,082.40	798,540	5.7	16.4	744.30
1999	1,581,270	5.4	23.0	900.40	869,470	5.8	24.5	1,041.90	711,800	5.0	21.4	727.70
1998	1,467,810	5.0	28.0	881.80	796,760	5.3	29.8	1,016.50	671,050	4.8	26.2	721.80
1997	1,437,310	4.9	33.0	877.90	771,580	5.1	34.9	1,012.10	665,730	4.7	30.9	722.50
1996	1,444,300	4.9	37.9	877.40	754,970	5.0	39.9	1,004.90	689,330	4.9	35.8	737.80
1995	1,344,420	4.6	42.5	881.90	742,330	4.9	44.8	1,004.90	602,090	4.3	40.1	730.30
1994	1,319,310	4.5	47.0	883.80	725,730	4.8	49.6	1,004.20	593,580	4.2	44.3	736.60
1993	1,292,290	4.4	51.5	881.80	716,030	4.7	54.3	996.80	576,260	4.1	48.4	738.90
1992	1,277,750	4.4	55.8	884.20	704,910	4.7	59.0	997.40	572,840	4.1	52.4	744.90
1991	1,203,750	4.1	59.9	886.00	659,480	4.4	63.4	994.70	544,270	3.9	56.3	754.30
1990	1,164,770	4.0	63.9	887.00	625,730	4.1	67.5	993.50	539,040	3.8	60.1	763.20
1989	1,100,980	3.8	67.7	879.00	581,610	3.8	71.4	980.40	519,370	3.7	63.8	765.40
1988	1,044,860	3.6	71.3	872.10	543,400	3.6	75.0	965.50	501,460	3.6	67.3	770.90
1987	999,800	3.4	74.7	874.70	514,650	3.4	78.4	962.20	485,150	3.4	70.8	781.80
1986	965,290	3.3	78.0	869.70	493,520	3.3	81.6	947.70	471,770	3.3	74.1	788.10
1985	875,750	3.0	81.0	866.70	440,050	2.9	84.5	932.60	435,700	3.1	77.2	800.10
1984	783,550	2.7	83.7	866.90	381,840	2.5	87.1	925.70	401,710	2.8	80.1	810.90
1983	736,280	2.5	86.2	885.50	350,920	2.3	89.4	940.30	385,360	2.7	82.8	835.60
1982	650,940	2.2	88.4	906.30	303,080	2.0	91.4	962.50	347,860	2.5	85.3	857.40
1981	572,340	2.0	90.4	953.50	259,480	1.7	93.1	1,022.50	312,860	2.2	87.5	896.20
1980	511,880	1.8	92.2	967.90	220,610	1.5	94.6	1,048.70	291,270	2.1	89.6	906.70
1979	441,500	1.5	93.7	974.00	181,410	1.2	95.8	1,059.50	260,090	1.8	91.4	914.40
1978	368,380	1.3	94.9	960.10	145,250	1.0	96.7	1,040.00	223,130	1.6	93.0	900.08
1977	291,910	1.0	95.9	940.60	114,620	0.8	97.5	1,018.40	177,290	1.3	94.2	890.30
1976	275,070	0.9	96.9	914.80	101,240	0.7	98.2	968.40	173,830	1.2	95.5	883.50
1975	227,770	0.8	97.7	896.40	81,470	0.5	98.7	940.30	146,300	1.0	96.5	871.90
1974	182,280	0.6	98.3	873.50	59,900	0.4	99.1	914.40	122,380	0.9	97.4	853.50
1973	143,930	0.5	98.8	862.00	43,650	0.3	99.4	892.10	100,280	0.7	98.1	849.00
1972	106,540	0.4	99.1	853.60	30,690	0.2	99.6	891.90	75,850	0.5	98.6	838.10
1971	79,150	0.3	99.4	846.80	21,340	0.1	99.7	883.30	57,810	0.4	99.0	833.40
1970	56,530	0.2	99.6	835.60	14,420	0.1	99.8	860.00	42,110	0.3	99.3	827.20
1969	39,230	0.1	99.7	817.30	8,860	0.1	99.9	855.70	30,370	0.2	99.6	806.10
1968	27,200	0.1	99.8	811.80	5,820	^b	99.9	831.80	21,380	0.2	99.7	806.40
1967	18,400	0.1	99.9	789.10	3,810	^b	100.0	839.30	14,590	0.1	99.8	776.00
1966	12,200	^b	99.9	763.90	2,390	^b	100.0	806.90	9,810	0.1	99.9	753.50
1965	7,690	^b	99.9	764.90	1,500	^b	100.0	823.90	6,190	^b	99.9	750.70

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

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

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2002, selected years

Year	Number (thousands)	Average age	Percentage distribution						
			Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
<i>Men</i>									
1940	99	68.8	100.0	...	74.4	17.4	6.4	1.6	0.2
1945	447	71.7	100.0	...	39.9	40.2	15.1	4.0	0.7
1950	1,469	72.2	100.0	...	39.1	33.7	20.2	5.9	1.2
1955	3,252	72.7	100.0	...	35.7	34.8	20.0	7.6	1.9
1960	5,217	73.2	100.0	...	33.8	33.1	21.1	9.0	3.1
1965	6,825	72.9	100.0	6.9	29.7	29.5	19.9	9.9	4.1
1970	7,688	72.6	100.0	7.5	30.1	26.9	19.6	10.6	5.3
1975	9,163	72.3	100.0	9.3	32.2	25.6	17.1	10.1	5.7
1980	10,461	72.2	100.0	9.5	32.1	25.8	16.9	9.5	6.1
1985	11,817	72.3	100.0	10.9	30.2	25.9	17.3	9.6	6.1
1986	12,080	72.4	100.0	10.9	30.3	25.7	17.3	9.7	6.1
1987	12,295	72.4	100.0	10.9	30.2	25.5	17.4	9.9	6.1
1988	12,483	72.4	100.0	10.7	30.0	25.5	17.6	10.0	6.2
1989	12,718	72.5	100.0	10.5	30.1	25.2	17.8	10.1	6.3
1990	12,985	72.5	100.0	10.3	30.0	25.3	17.8	10.2	6.4
1991	13,227	72.6	100.0	10.2	29.5	25.7	17.9	10.3	6.4
1992	13,474	72.7	100.0	10.0	29.2	25.8	17.8	10.5	6.6
1993	13,649	72.8	100.0	9.9	28.9	25.9	17.9	10.7	6.8
1994	13,795	72.8	100.0	9.8	28.3	26.2	17.9	10.9	6.9
1995	13,915	72.9	100.0	9.5	28.0	26.1	18.3	11.1	7.0
1996	14,012	73.1	100.0	9.2	27.6	25.8	18.9	11.3	7.2
1997	14,126	73.2	100.0	9.0	27.2	25.8	19.2	11.4	7.4
1998	14,206	73.3	100.0	9.0	26.6	25.6	19.5	11.6	7.6
1999	14,329	73.3	100.0	9.1	26.4	25.2	19.8	11.7	7.8
2000	14,772	73.2	100.0	9.0	27.6	24.6	19.3	11.7	7.8
2001	14,930	73.3	100.0	8.9	27.6	24.3	19.1	12.1	7.9
2002	15,070	73.3	100.0	8.8	27.9	24.0	19.1	12.4	7.8
<i>Women</i>									
1940	13	68.1	100.0	...	82.6	12.8	3.9	0.6	^a
1945	71	70.8	100.0	...	47.1	40.0	10.2	2.3	0.3
1950	302	71.1	100.0	...	48.4	32.9	15.0	3.2	0.5
1955	1,222	71.3	100.0	...	47.8	32.3	14.6	4.4	0.8
1960	2,845	71.0	100.0	12.6	36.3	29.0	15.0	5.6	1.6
1965	4,276	71.8	100.0	12.2	31.6	28.1	17.6	7.7	2.8
1970	5,661	72.0	100.0	11.5	30.1	25.4	18.7	10.0	4.4
1975	7,424	72.2	100.0	11.8	30.4	24.2	16.9	10.6	6.1
1980	9,101	72.6	100.0	11.2	29.2	24.2	17.1	10.6	7.7
1985	10,615	73.3	100.0	11.0	26.9	23.9	17.9	11.4	8.8
1986	10,901	73.3	100.0	10.8	26.7	23.8	18.0	11.7	9.0
1987	11,145	73.4	100.0	10.7	26.4	23.6	18.1	11.9	9.3
1988	11,944	73.5	100.0	10.5	26.0	23.6	18.2	12.2	9.5
1989	11,608	73.6	100.0	10.2	26.1	23.1	18.4	12.4	9.8
1990	11,842	73.7	100.0	9.9	25.9	23.0	18.5	12.5	10.2
1991	12,048	73.9	100.0	9.5	25.4	23.2	18.6	12.7	10.5
1992	12,272	74.0	100.0	9.3	25.2	23.1	18.5	12.9	10.9
1993	12,447	74.1	100.0	9.0	24.9	23.0	18.6	13.1	11.3
1994	12,607	74.2	100.0	9.0	24.3	23.2	18.4	13.4	11.6
1995	12,757	74.3	100.0	8.8	24.0	23.2	18.5	13.5	11.9
1996	12,887	74.4	100.0	8.7	23.6	22.9	18.8	13.7	12.2
1997	13,155	74.5	100.0	8.6	23.2	23.0	19.0	13.8	12.5
1998	13,304	74.6	100.0	8.7	22.8	22.8	19.0	13.9	12.8
1999	13,453	74.6	100.0	8.8	22.8	22.3	19.3	13.8	13.0
2000	13,734	74.6	100.0	8.9	23.4	21.9	19.1	13.8	13.0
2001	13,912	74.6	100.0	8.9	23.6	21.6	18.8	13.9	13.1
2002	14,096	74.6	100.0	8.8	23.9	21.3	18.7	14.0	13.3

a. Less than 0.05 percent.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2002 are based on a 10 percent sample. All other years are 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, December 2002

Monthly benefit (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	29,203,660	100.0	8,313,920	100.0	20,889,740	100.0
Less than 400.00	2,070,520	7.1	403,870	4.9	1,666,650	8.0
400.00–449.90	845,790	2.9	104,520	1.3	741,270	3.5
450.00–499.90	1,205,140	4.1	183,940	2.2	1,021,200	4.9
500.00–549.90	1,525,200	5.2	239,970	2.9	1,285,230	6.2
550.00–599.90	1,409,400	4.8	276,660	3.3	1,132,740	5.4
600.00–649.90	1,295,210	4.4	302,020	3.6	993,190	4.8
650.00–699.90	1,217,630	4.2	314,800	3.8	902,830	4.3
700.00–749.90	1,173,370	4.0	295,700	3.6	877,670	4.2
750.00–799.90	1,203,290	4.1	301,110	3.6	902,180	4.3
800.00–849.90	1,248,960	4.3	293,150	3.5	955,810	4.6
850.00–899.90	1,349,520	4.6	308,640	3.7	1,040,880	5.0
900.00–949.90	1,465,840	5.0	312,420	3.8	1,153,420	5.5
950.00–999.90	1,543,090	5.3	320,850	3.9	1,222,240	5.9
1,000.00–1,049.90	1,625,850	5.6	339,720	4.1	1,286,130	6.2
1,050.00–1,099.90	1,681,790	5.8	334,070	4.0	1,347,720	6.5
1,100.00–1,149.90	1,399,150	4.8	337,830	4.1	1,061,320	5.1
1,150.00–1,199.90	1,231,860	4.2	351,960	4.2	879,900	4.2
1,200.00–1,249.90	1,078,720	3.7	376,450	4.5	702,270	3.4
1,250.00–1,299.90	957,850	3.3	395,710	4.8	562,140	2.7
1,300.00 or more	3,675,480	12.6	2,520,530	30.3	1,154,950	5.5
Average benefit (dollars)	895.00		1,059.20		829.70	
Men	15,107,850	100.0	4,744,110	100.0	10,363,740	100.0
Less than 400.00	865,720	5.7	188,910	4.0	676,810	6.5
400.00–449.90	250,700	1.7	39,220	0.8	211,480	2.0
450.00–499.90	297,960	2.0	65,430	1.4	232,530	2.2
500.00–549.90	330,120	2.2	79,930	1.7	250,190	2.4
550.00–599.90	346,270	2.3	83,050	1.8	263,220	2.5
600.00–649.90	373,020	2.5	86,590	1.8	286,430	2.8
650.00–699.90	405,690	2.7	91,530	1.9	314,160	3.0
700.00–749.90	445,590	2.9	91,560	1.9	354,030	3.4
750.00–799.90	505,100	3.3	102,240	2.2	402,860	3.9
800.00–849.90	583,210	3.9	110,270	2.3	472,940	4.6
850.00–899.90	676,280	4.5	124,720	2.6	551,560	5.3
900.00–949.90	817,690	5.4	133,100	2.8	684,590	6.6
950.00–999.90	907,120	6.0	145,770	3.1	761,350	7.3
1,000.00–1,049.90	1,032,910	6.8	167,700	3.5	865,210	8.3
1,050.00–1,099.90	1,151,030	7.6	178,620	3.8	972,410	9.4
1,100.00–1,149.90	972,640	6.4	199,610	4.2	773,030	7.5
1,150.00–1,199.90	869,620	5.8	230,010	4.8	639,610	6.2
1,200.00–1,249.90	773,860	5.1	266,950	5.6	506,910	4.9
1,250.00–1,299.90	702,880	4.7	294,810	6.2	408,070	3.9
1,300.00 or more	2,800,440	18.5	2,064,090	43.5	736,350	7.1
Average benefit (dollars)	1,008.10		1,188.40		925.50	
Women	14,095,810	100.0	3,569,810	100.0	10,526,000	100.0
Less than 400.00	1,204,800	8.5	214,960	6.0	989,840	9.4
400.00–449.90	595,090	4.2	65,300	1.8	529,790	5.0
450.00–499.90	907,180	6.4	118,510	3.3	788,670	7.5
500.00–549.90	1,195,080	8.5	160,040	4.5	1,035,040	9.8
550.00–599.90	1,063,130	7.5	193,610	5.4	869,520	8.3
600.00–649.90	922,190	6.5	215,430	6.0	706,760	6.7
650.00–699.90	811,940	5.8	223,270	6.3	588,670	5.6
700.00–749.90	727,780	5.2	204,140	5.7	523,640	5.0
750.00–799.90	698,190	5.0	198,870	5.6	499,320	4.7
800.00–849.90	665,750	4.7	182,880	5.1	482,870	4.6
850.00–899.90	673,240	4.8	183,920	5.2	489,320	4.6
900.00–949.90	648,150	4.6	179,320	5.0	468,830	4.5
950.00–999.90	635,970	4.5	175,080	4.9	460,890	4.4
1,000.00–1,049.90	592,940	4.2	172,020	4.8	420,920	4.0
1,050.00–1,099.90	530,760	3.8	155,450	4.4	375,310	3.6
1,100.00–1,149.90	426,510	3.0	138,220	3.9	288,290	2.7
1,150.00–1,199.90	362,240	2.6	121,950	3.4	240,290	2.3
1,200.00–1,249.90	304,860	2.2	109,500	3.1	195,360	1.9
1,250.00–1,299.90	254,970	1.8	100,900	2.8	154,070	1.5
1,300.00 or more	875,040	6.2	456,440	12.8	418,600	4.0
Average benefit (dollars)	773.90		887.40		735.40	

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, December 2002

Primary insurance amount (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	29,203,660	100.0	8,313,920	100.0	20,889,740	100.0
Less than 400.00	3,322,440	11.4	681,580	8.2	2,640,860	12.6
400.00–449.90	730,290	2.5	154,930	1.9	575,360	2.8
450.00–499.90	1,187,260	4.1	273,260	3.3	914,000	4.4
500.00–549.90	1,299,560	4.4	298,910	3.6	1,000,650	4.8
550.00–599.90	1,257,260	4.3	293,790	3.5	963,470	4.6
600.00–649.90	1,221,730	4.2	290,280	3.5	931,450	4.5
650.00–699.90	1,162,800	4.0	291,550	3.5	871,250	4.2
700.00–749.90	1,120,470	3.8	285,670	3.4	834,800	4.0
750.00–799.90	1,082,090	3.7	292,980	3.5	789,110	3.8
800.00–849.90	1,028,560	3.5	288,590	3.5	739,970	3.5
850.00–899.90	1,051,150	3.6	306,470	3.7	744,680	3.6
900.00–949.90	1,014,900	3.5	296,440	3.6	718,460	3.4
950.00–999.90	1,012,640	3.5	297,120	3.6	715,520	3.4
1,000.00–1,049.90	1,045,250	3.6	312,810	3.8	732,440	3.5
1,050.00–1,099.90	1,046,370	3.6	305,860	3.7	740,510	3.5
1,100.00–1,149.90	1,109,990	3.8	313,600	3.8	796,390	3.8
1,150.00–1,199.90	1,235,490	4.2	345,740	4.2	889,750	4.3
1,200.00–1,249.90	1,246,150	4.3	385,320	4.6	860,830	4.1
1,250.00–1,299.90	1,343,040	4.6	430,070	5.2	912,970	4.4
1,300.00 or more	5,686,220	19.5	2,168,950	26.1	3,517,270	16.8
Average primary insurance amount (dollars)	905.60		986.90		873.30	
Men	15,107,850	100.0	4,744,110	100.0	10,363,740	100.0
Less than 400.00	688,730	4.6	199,250	4.2	489,480	4.7
400.00–449.90	148,950	1.0	42,400	0.9	106,550	1.0
450.00–499.90	236,980	1.6	72,320	1.5	164,660	1.6
500.00–549.90	273,510	1.8	82,830	1.7	190,680	1.8
550.00–599.90	285,800	1.9	84,460	1.8	201,340	1.9
600.00–649.90	295,670	2.0	86,450	1.8	209,220	2.0
650.00–699.90	308,620	2.0	92,820	2.0	215,800	2.1
700.00–749.90	328,570	2.2	93,490	2.0	235,080	2.3
750.00–799.90	356,310	2.4	102,760	2.2	253,550	2.4
800.00–849.90	381,840	2.5	110,010	2.3	271,830	2.6
850.00–899.90	441,430	2.9	129,990	2.7	311,440	3.0
900.00–949.90	478,880	3.2	135,040	2.8	343,840	3.3
950.00–999.90	538,470	3.6	149,410	3.1	389,060	3.8
1,000.00–1,049.90	619,560	4.1	174,330	3.7	445,230	4.3
1,050.00–1,099.90	687,910	4.6	186,500	3.9	501,410	4.8
1,100.00–1,149.90	804,500	5.3	209,910	4.4	594,590	5.7
1,150.00–1,199.90	975,160	6.5	251,930	5.3	723,230	7.0
1,200.00–1,249.90	1,027,570	6.8	300,400	6.3	727,170	7.0
1,250.00–1,299.90	1,142,190	7.6	347,160	7.3	795,030	7.7
1,300.00 or more	5,087,200	33.7	1,892,650	39.9	3,194,550	30.8
Average primary insurance amount (dollars)	1,108.60		1,147.30		1,090.90	
Women	14,095,810	100.0	3,569,810	100.0	10,526,000	100.0
Less than 400.00	2,633,710	18.7	482,330	13.5	2,151,380	20.4
400.00–449.90	581,340	4.1	112,530	3.2	468,810	4.5
450.00–499.90	950,280	6.7	200,940	5.6	749,340	7.1
500.00–549.90	1,026,050	7.3	216,080	6.1	809,970	7.7
550.00–599.90	971,460	6.9	209,330	5.9	762,130	7.2
600.00–649.90	926,060	6.6	203,830	5.7	722,230	6.9
650.00–699.90	854,180	6.1	198,730	5.6	655,450	6.2
700.00–749.90	791,900	5.6	192,180	5.4	599,720	5.7
750.00–799.90	725,780	5.1	190,220	5.3	535,560	5.1
800.00–849.90	646,720	4.6	178,580	5.0	468,140	4.4
850.00–899.90	609,720	4.3	176,480	4.9	433,240	4.1
900.00–949.90	536,020	3.8	161,400	4.5	374,620	3.6
950.00–999.90	474,170	3.4	147,710	4.1	326,460	3.1
1,000.00–1,049.90	425,690	3.0	138,480	3.9	287,210	2.7
1,050.00–1,099.90	358,460	2.5	119,360	3.3	239,100	2.3
1,100.00–1,149.90	305,490	2.2	103,690	2.9	201,800	1.9
1,150.00–1,199.90	260,330	1.8	93,810	2.6	166,520	1.6
1,200.00–1,249.90	218,580	1.6	84,920	2.4	133,660	1.3
1,250.00–1,299.90	200,850	1.4	82,910	2.3	117,940	1.1
1,300.00 or more	599,020	4.2	276,300	7.7	322,720	3.1
Average primary insurance amount (dollars)	688.10		773.80		659.00	

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B8—Number and average monthly benefit with and without reduction for early retirement, by sex, December 1956–2002, selected years

Year	All retired workers				Men				Women			
	Total	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of total	Subtotal	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of subtotal	Subtotal	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of subtotal
Number												
1956	5,112,430	4,997,401	115,029	2.2	3,572,271	3,572,271	...	...	1,540,159	1,425,130	115,029	7.5
1960	8,061,469	7,112,265	949,204	11.8	5,216,668	5,216,668	...	...	2,844,801	1,895,597	949,204	33.4
1965	11,100,584	7,581,386	3,519,198	31.7	6,825,078	5,389,166	1,435,912	21.0	4,275,506	2,192,220	2,083,286	48.7
1970	13,349,175	7,282,295	6,066,880	45.4	7,688,460	4,930,400	2,758,060	35.9	5,660,715	2,351,895	3,308,820	58.5
1980	19,562,085	7,397,198	12,164,887	62.2	10,460,735	4,586,539	5,874,196	54.8	9,101,350	2,810,659	6,290,691	69.1
1985	22,431,930	7,720,959	14,710,971	65.6	11,816,956	4,655,477	7,161,479	60.6	10,614,974	3,065,482	7,549,492	71.1
1990	24,838,100	7,840,239	16,997,861	68.4	12,983,832	4,592,911	8,390,921	64.6	11,854,268	3,247,328	8,606,940	72.6
1995	26,672,806	7,941,363	18,731,443	70.2	13,913,531	4,559,535	9,353,996	67.2	12,759,275	3,381,828	9,377,447	73.5
1996	26,898,072	7,784,078	19,113,994	71.1	14,010,875	4,478,565	9,532,310	68.0	12,887,197	3,305,513	9,581,684	74.4
1997	27,274,572	7,673,286	19,601,286	71.9	14,116,818	4,371,503	9,745,315	69.0	13,157,754	3,301,783	9,855,971	74.9
1998	27,510,535	7,699,664	19,810,871	72.0	14,200,826	4,371,895	9,828,931	69.2	13,309,709	3,327,769	9,981,940	75.0
1999	27,774,677	7,739,557	20,035,120	72.1	14,321,468	4,385,921	9,935,547	69.4	13,453,209	3,353,636	10,099,573	75.1
2000	28,498,945	8,179,425	20,319,520	71.3	14,767,170	4,690,652	10,076,518	68.2	13,731,775	3,488,773	10,243,002	74.6
2001	28,836,774	8,262,843	20,573,931	71.3	14,930,081	4,719,500	10,210,581	68.4	13,906,693	3,543,340	10,363,350	74.5
2002	29,190,137	8,306,422	20,883,715	71.5	15,100,473	4,736,285	10,364,188	68.8	14,089,664	3,570,137	10,519,527	74.7
Average monthly benefit (dollars)												
1956	63.10	63.40	48.20	...	68.20	68.20	...	...	51.20	51.40	48.20	...
1960	74.00	76.50	55.80	...	81.90	81.90	...	...	59.70	61.60	55.80	...
1965	83.90	90.10	70.60	...	92.60	96.10	79.40	...	70.10	75.40	64.50	...
1970	118.10	130.20	103.60	...	130.50	139.10	115.30	...	101.20	111.70	93.80	...
1980	341.40	391.80	310.70	...	380.20	419.60	349.50	...	296.80	346.50	274.60	...
1985	478.60	581.20	424.80	...	538.40	627.50	480.50	...	412.10	511.00	372.00	...
1990	602.60	742.80	537.90	...	679.30	803.60	611.20	...	518.60	656.80	466.40	...
1995	719.80	885.60	649.50	...	810.20	963.70	735.40	...	621.20	780.40	563.80	...
1996	745.00	908.70	678.30	...	838.10	997.80	763.10	...	643.70	788.00	593.90	...
1997	765.00	915.90	705.90	...	860.50	1,025.10	786.60	...	662.50	771.30	626.10	...
1998	779.70	932.50	720.30	...	876.90	1,044.50	802.40	...	675.90	785.40	639.50	...
1999	804.30	959.20	744.40	...	904.60	1,075.30	829.30	...	697.50	807.50	661.00	...
2000	844.50	1,008.40	778.50	...	951.10	1,131.10	867.20	...	729.90	843.40	691.20	...
2001	874.40	1,038.70	808.50	...	984.60	1,166.00	900.70	...	756.20	869.20	717.60	...
2002	895.00	1,058.90	829.80	...	1,007.80	1,188.50	925.20	...	774.10	886.90	735.80	...

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

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2002

Monthly benefit (dollars)	Total, 62 or older	62-64	65-69	70-74	75-79	80-84	85-89	90 or older
<i>All retired workers</i>								
Total								
Number (thousands)	29,204	2,579	7,568	6,614	5,525	3,838	2,070	1,010
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	7.1	9.0	7.3	7.2	6.8	6.8	5.6	6.4
400.00-449.90	2.9	3.6	2.8	2.9	3.1	2.9	2.2	2.3
450.00-499.90	4.1	5.0	3.8	4.4	4.7	3.9	2.7	3.0
500.00-549.90	5.2	6.5	5.7	6.0	4.9	4.2	3.1	3.4
550.00-599.90	4.8	7.1	5.6	4.8	4.2	4.0	3.1	3.5
600.00-649.90	4.4	6.3	4.7	4.5	4.1	3.8	3.2	3.8
650.00-699.90	4.2	4.7	4.6	4.3	3.9	3.7	3.4	4.0
700.00-749.90	4.0	4.1	4.3	4.1	3.8	3.9	3.6	4.6
750.00-799.90	4.1	3.7	4.1	4.0	3.9	4.3	4.4	6.0
800.00-849.90	4.3	3.6	3.9	4.0	4.2	5.0	5.0	7.4
850.00-899.90	4.6	3.5	3.9	4.2	4.6	6.1	5.8	8.1
900.00-949.90	5.0	3.4	3.9	4.4	5.2	8.2	5.9	7.1
950.00-999.90	5.3	3.4	3.9	4.7	6.7	7.6	5.8	6.5
1,000.00-1,049.90	5.6	3.3	4.2	6.0	7.8	5.5	5.8	6.3
1,050.00-1,099.90	5.8	3.3	5.5	7.3	6.4	4.7	5.6	4.9
1,100.00-1,149.90	4.8	3.4	5.7	5.5	4.1	4.2	4.2	3.9
1,150.00-1,199.90	4.2	5.8	4.9	3.7	3.6	4.3	3.7	2.9
1,200.00-1,249.90	3.7	6.3	3.8	3.0	3.4	4.0	3.3	2.3
1,250.00-1,299.90	3.3	5.6	3.1	2.9	3.3	3.1	3.1	2.1
1,300.00 or more	12.6	8.5	14.4	12.4	11.4	9.9	20.6	11.4
Average benefit (dollars)	895.00	831.10	894.30	889.00	893.50	893.90	994.80	912.00
<i>Men</i>								
Total								
Number (thousands)	15,108	1,333	4,198	3,611	2,886	1,869	872	340
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	5.7	6.8	5.8	5.7	5.3	6.0	5.1	5.7
400.00-449.90	1.7	1.8	1.5	1.6	1.7	1.8	1.7	2.0
450.00-499.90	2.0	2.4	1.8	1.9	2.1	2.0	1.9	2.4
500.00-549.90	2.2	2.3	2.1	2.2	2.3	2.4	1.9	2.7
550.00-599.90	2.3	2.4	2.2	2.3	2.3	2.4	2.1	2.7
600.00-649.90	2.5	2.5	2.3	2.5	2.5	2.7	2.2	2.8
650.00-699.90	2.7	2.7	2.6	2.7	2.7	2.9	2.5	3.2
700.00-749.90	3.0	2.9	2.8	3.0	2.9	3.3	2.7	3.5
750.00-799.90	3.3	3.2	3.1	3.4	3.3	3.9	3.3	4.8
800.00-849.90	3.9	3.3	3.4	3.8	3.8	4.8	4.0	6.7
850.00-899.90	4.5	3.6	3.8	4.3	4.6	6.5	4.6	6.8
900.00-949.90	5.4	3.8	4.1	4.8	5.5	10.6	5.4	6.3
950.00-999.90	6.0	4.1	4.4	5.4	8.0	9.4	5.3	5.9
1,000.00-1,049.90	6.8	4.3	5.1	7.7	10.5	5.9	5.5	6.4
1,050.00-1,099.90	7.6	4.5	7.4	10.2	8.5	5.0	6.1	5.6
1,100.00-1,149.90	6.4	4.9	8.2	7.6	5.0	4.7	4.4	4.8
1,150.00-1,199.90	5.8	9.0	7.2	4.9	4.3	5.4	4.1	3.8
1,200.00-1,249.90	5.1	10.5	5.5	3.9	4.3	5.2	3.8	3.1
1,250.00-1,299.90	4.7	9.8	4.5	3.9	4.4	3.9	3.8	3.4
1,300.00 or more	18.5	15.4	22.3	18.2	16.2	11.4	29.8	17.6
Average benefit (dollars)	1,008.10	990.40	1,030.60	1,007.50	993.90	954.50	1,094.30	999.80

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2002—Continued

Monthly benefit (dollars)	Total, 62 or older	62-64	65-69	70-74	75-79	80-84	85-89	90 or older
<i>Women</i>								
Total								
Number (thousands)	14,096	1,246	3,369	3,004	2,639	1,969	1,198	670
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	8.6	11.4	9.2	8.9	8.4	7.6	5.9	6.8
400.00-449.90	4.2	5.6	4.4	4.5	4.5	3.9	2.5	2.4
450.00-499.90	6.4	7.8	6.4	7.3	7.7	5.6	3.3	3.3
500.00-549.90	8.5	10.9	10.2	10.5	7.8	6.0	4.0	3.8
550.00-599.90	7.5	12.1	9.8	7.9	6.4	5.5	3.8	3.9
600.00-649.90	6.5	10.3	7.7	6.8	5.9	4.9	4.0	4.3
650.00-699.90	5.8	6.9	7.1	6.1	5.2	4.5	4.1	4.5
700.00-749.90	5.2	5.3	6.0	5.3	4.8	4.5	4.2	5.1
750.00-799.90	5.0	4.4	5.4	4.8	4.6	4.7	5.1	6.6
800.00-849.90	4.7	3.8	4.4	4.2	4.5	5.1	5.8	7.8
850.00-899.90	4.8	3.4	4.0	4.1	4.7	5.6	6.6	8.8
900.00-949.90	4.6	2.9	3.7	4.0	4.9	5.9	6.3	7.5
950.00-999.90	4.5	2.7	3.3	3.9	5.2	6.0	6.2	6.8
1,000.00-1,049.90	4.2	2.3	3.1	3.9	4.8	5.1	6.0	6.3
1,050.00-1,099.90	3.8	2.0	3.1	3.8	4.0	4.5	5.2	4.6
1,100.00-1,149.90	3.0	1.8	2.6	2.9	3.2	3.7	4.1	3.5
1,150.00-1,199.90	2.6	2.3	2.1	2.2	2.8	3.4	3.4	2.5
1,200.00-1,249.90	2.2	1.8	1.6	1.9	2.5	2.9	2.9	1.9
1,250.00-1,299.90	1.8	1.2	1.4	1.7	2.1	2.3	2.6	1.5
1,300.00 or more	6.2	1.2	4.5	5.3	6.2	8.4	13.9	8.3
Average benefit (dollars)	773.90	660.70	724.30	746.60	783.60	836.50	922.40	867.60

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C1—Number and percentage distribution, by primary insurance amount and type of benefit, December 2002

Primary insurance amount (dollars)	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	29,203,660	100.0	2,681,090	100.0	477,380	100.0
Less than 300.00	1,779,790	6.1	72,370	2.7	12,900	2.7
300.00–349.90	911,680	3.1	30,310	1.1	6,280	1.3
350.00–399.90	630,970	2.2	23,850	0.9	6,130	1.3
400.00–449.90	730,290	2.5	27,580	1.0	6,060	1.3
450.00–499.90	1,187,260	4.1	45,300	1.7	10,650	2.2
500.00–549.90	1,299,560	4.4	49,290	1.8	14,820	3.1
550.00–599.90	1,257,260	4.3	50,600	1.9	15,370	3.2
600.00–649.90	1,221,730	4.2	50,240	1.9	15,210	3.2
650.00–699.90	1,162,800	4.0	50,760	1.9	16,250	3.4
700.00–749.90	1,120,470	3.8	55,540	2.1	16,720	3.5
750.00–799.90	1,082,090	3.7	57,960	2.2	17,380	3.6
800.00–849.90	1,028,560	3.5	61,250	2.3	17,770	3.7
850.00–899.90	1,051,150	3.6	70,350	2.6	19,040	4.0
900.00–949.90	1,014,900	3.5	76,390	2.8	19,110	4.0
950.00–999.90	1,012,640	3.5	84,190	3.1	18,810	3.9
1,000.00–1,049.90	1,045,250	3.6	97,030	3.6	19,520	4.1
1,050.00–1,099.90	1,046,370	3.6	107,450	4.0	19,660	4.1
1,100.00–1,149.90	1,109,990	3.8	133,580	5.0	21,450	4.5
1,150.00–1,199.90	1,235,490	4.2	177,060	6.6	22,610	4.7
1,200.00–1,249.90	1,246,150	4.3	194,270	7.2	22,520	4.7
1,250.00–1,299.90	1,343,040	4.6	223,180	8.3	24,410	5.1
1,300.00–1,349.90	1,489,160	5.1	258,890	9.7	29,040	6.1
1,350.00–1,399.90	1,151,420	3.9	205,590	7.7	23,930	5.0
1,400.00–1,449.90	879,750	3.0	148,900	5.6	19,310	4.0
1,450.00–1,499.90	651,730	2.2	103,890	3.9	16,780	3.5
1,500.00 or more	1,514,160	5.2	225,270	8.4	45,650	9.6
Average primary insurance amount (dollars)	905.60		1,116.00		1,031.10	

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2002, selected years (in dollars)

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled solely because of age ^a	Entitled because of children ^b		All	Under age 18	Disabled adult children	Students
1940	22.60	23.17	18.37	12.13	12.13	...	...	12.22	12.22	...	...
1945	24.19	24.94	19.51	12.82	12.82	...	...	12.45	12.45	...	...
1946	24.55	25.30	19.64	12.99	12.99	...	...	12.57	12.57	...	...
1947	24.90	25.68	19.91	13.17	13.17	...	...	12.77	12.77	...	...
1948	25.35	26.21	20.11	13.42	13.42	...	...	12.99	12.99	...	...
1949	26.00	26.92	20.58	13.76	13.76	...	...	13.18	13.18	...	...
1950	43.86	45.67	35.05	23.60	23.79	12.85	20.01	17.05	17.05	...	...
1951	42.14	44.44	33.03	22.75	23.16	14.33	19.49	13.37	13.37	...	...
1952	49.25	52.16	39.17	26.01	26.48	16.33	22.31	14.67	14.67	...	...
1953	51.10	54.46	40.66	27.08	27.53	17.97	23.10	15.79	15.79	...	...
1954	59.14	63.34	47.05	31.81	32.36	21.11	26.61	18.53	18.53	...	...
1955	61.90	66.40	49.93	33.12	33.63	22.96	27.27	20.01	20.01	...	...
1956	63.09	68.23	51.16	33.76	34.22	23.64	27.90	20.63	20.63	...	...
1957	64.58	70.47	52.23	34.41	34.89	24.21	29.39	21.89	20.90	31.55	...
1958	66.35	72.74	53.55	35.11	35.59	25.12	30.45	22.99	21.66	32.00	...
1959	72.78	80.11	58.81	38.24	38.68	29.39	33.85	27.34	25.61	35.08	...
1960	74.04	81.87	59.67	38.74	39.19	30.15	34.72	28.25	26.38	35.70	...
1961	75.65	83.13	62.00	39.47	40.09	29.45	36.61	27.52	25.56	36.22	...
1962	76.19	83.79	62.61	39.64	40.35	29.55	37.05	27.39	25.44	36.35	...
1963	76.88	84.69	63.42	39.95	40.66	29.94	37.64	27.85	25.76	36.84	...
1964	77.57	85.58	64.28	40.24	40.95	30.16	38.18	28.13	25.86	37.34	...
1965	83.92	92.59	70.07	43.64	44.41	32.60	41.69	31.98	28.27	40.64	46.75
1966	84.35	93.26	70.79	43.82	44.60	32.64	42.21	32.72	28.18	41.03	45.05
1967	85.37	94.49	71.92	44.25	45.01	32.92	42.79	33.10	28.34	41.49	45.07
1968	98.86	109.08	84.24	51.22	52.13	37.66	49.29	38.12	32.44	47.79	51.08
1969	100.40	110.96	85.71	51.89	52.81	38.00	49.90	38.63	32.79	48.46	51.33
1970	118.10	130.53	101.22	61.20	62.41	43.23	58.47	44.85	37.72	56.79	59.46
1971	132.17	146.13	113.60	68.36	69.82	47.07	65.25	49.36	41.08	62.57	65.93
1972	162.35	179.44	140.11	84.11	86.07	56.10	79.97	59.90	49.44	75.91	80.13
1973	166.40	182.60	145.80	84.80	86.80	56.80	80.80	61.10	50.30	77.00	82.70
1974	188.20	206.56	165.47	95.77	98.08	64.24	90.90	69.63	57.10	86.61	94.21
1975	207.18	227.75	181.80	105.21	107.74	70.72	99.07	77.42	63.13	94.75	103.88
1976	224.86	247.70	197.08	114.15	116.82	77.29	106.68	85.64	69.55	102.81	113.92
1977	243.00	268.40	212.60	123.30	126.20	84.20	100.90	94.90	76.90	112.30	124.60
1978	263.20	291.60	229.70	133.10	136.00	91.70	106.00	104.70	85.10	121.70	138.40
1979	294.30	326.80	256.50	148.80	151.90	102.90	116.00	119.20	97.00	137.10	157.20
1980	341.40	380.20	296.80	172.50	176.00	120.40	132.10	140.00	114.30	159.80	184.00
1981	386.00	431.10	334.50	195.40	199.20	138.20	145.90	161.40	131.10	182.20	210.60
1982	419.30	469.60	362.20	213.60	216.90	148.80	156.00	165.00	145.90	198.40	179.70
1983	440.80	495.00	379.60	226.50	229.50	151.30	160.90	175.80	163.20	210.10	153.50
1984	460.60	517.80	396.50	237.20	240.30	156.70	165.80	185.50	170.60	220.80	149.90
1985	478.60	538.40	412.10	247.20	250.30	161.90	169.50	197.60	177.40	230.80	232.30
1986	488.50	549.80	420.50	252.70	255.70	165.10	170.40	203.80	182.50	236.80	241.20
1987	512.70	577.50	441.20	265.40	268.40	174.00	175.90	215.90	192.70	249.90	252.60
1988	536.80	604.90	462.00	278.00	281.00	182.40	181.50	227.70	201.60	263.30	265.40
1989	566.90	638.90	487.90	293.80	296.80	194.00	189.10	242.40	213.80	279.30	283.70
1990	602.60	679.30	518.60	312.30	315.40	208.10	198.20	259.40	228.50	298.30	300.90
1991	629.30	709.30	541.60	326.10	329.20	219.40	203.30	272.70	240.60	312.90	306.70
1992	652.60	735.50	561.80	337.90	341.00	229.30	208.20	285.20	252.30	326.00	322.20
1993	674.10	759.30	580.70	348.80	351.80	238.70	212.10	296.80	263.10	338.00	333.40
1994	697.30	785.20	610.30	360.50	363.60	248.60	216.40	309.30	275.00	351.10	349.60
1995	719.80	810.20	621.20	371.90	375.00	256.70	220.80	321.50	286.70	363.80	360.30
1996	745.00	838.10	643.70	385.10	387.70	277.30	225.70	337.10	303.00	378.40	374.70
1997	765.00	860.50	662.50	394.70	397.20	286.40	228.80	349.00	314.90	389.80	388.40
1998	779.70	876.90	675.90	401.70	404.00	294.90	230.50	358.40	324.30	399.00	398.00
1999	804.30	904.60	697.50	413.00	415.30	307.50	234.50	372.40	338.90	413.00	417.30
2000	844.50	951.10	729.90	431.30	433.50	328.90	242.70	394.80	363.40	433.70	444.40
2001	874.40	984.60	756.20	445.10	447.20	345.30	250.30	412.60	382.20	451.00	462.60
2002	895.00	1,007.80	774.10	453.90	456.00	358.00	256.10	426.40	397.10	463.90	477.00

a. Aged 62 or older. Includes wives aged 65 or older with children.
b. Under age 65 with entitled children in their care.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D1—Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2002

Year of entitlement	All disabled workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	5,535,860	100.0	...	834.10	3,069,140	100.0	...	935.00	2,466,720	100.0	...	708.60
2000–2002	1,293,280	23.4	...	919.00	703,360	22.9	...	1,043.60	589,920	23.9	...	770.30
1995–1999	1,939,640	35.0	...	831.60	1,010,930	32.9	...	948.00	928,710	37.6	...	704.90
1990–1994	1,281,230	23.1	...	787.30	705,400	23.0	...	884.80	575,830	23.3	...	667.80
1985–1989	529,110	9.6	...	769.60	317,950	10.4	...	845.30	211,160	8.6	...	655.60
1980–1984	247,720	4.5	...	740.30	163,550	5.3	...	791.90	84,170	3.4	...	640.00
1975–1979	153,340	2.8	...	942.10	103,580	3.4	...	991.30	49,760	2.0	...	839.80
1970–1974	73,070	1.3	...	818.60	50,600	1.6	...	844.20	22,470	0.9	...	760.80
1965–1969	17,740	0.3	...	685.50	13,180	0.4	...	692.20	4,560	0.2	...	666.20
Before 1965	730	^b	...	673.70	590	^b	...	670.60	140	^b	...	686.90
2002	290,730	5.3	5.3	965.10	166,040	5.4	5.4	1,094.40	124,690	5.1	5.1	792.90
2001	484,210	8.7	14.0	918.90	264,420	8.6	14.0	1,039.40	219,790	8.9	14.0	774.00
2000	518,340	9.4	23.4	893.20	272,900	8.9	22.9	1,016.80	245,440	10.0	23.9	755.60
1999	478,860	8.7	32.0	859.60	247,630	8.1	31.0	980.30	231,230	9.4	33.3	730.20
1998	417,140	7.5	39.5	834.10	216,440	7.1	38.0	952.50	200,700	8.1	41.4	706.50
1997	373,180	6.7	46.3	819.90	194,450	6.3	44.4	933.10	178,730	7.2	48.7	696.60
1996	349,250	6.3	52.6	815.20	184,070	6.0	50.4	931.40	165,180	6.7	55.4	685.70
1995	321,210	5.8	58.4	818.20	168,340	5.5	55.9	930.20	152,870	6.2	61.6	694.80
1994	304,310	5.5	63.9	812.50	160,410	5.2	61.1	925.80	143,900	5.8	67.4	686.10
1993	276,690	5.0	68.9	789.10	149,590	4.9	66.0	895.20	127,100	5.2	72.6	664.30
1992	263,240	4.8	73.6	777.00	146,170	4.8	70.7	869.90	117,070	4.7	77.3	661.00
1991	241,540	4.4	78.0	770.90	136,590	4.5	75.2	857.60	104,950	4.3	81.6	658.00
1990	195,450	3.5	81.5	779.40	112,640	3.7	78.8	864.70	82,810	3.4	84.9	663.40
1989	144,900	2.6	84.2	781.10	84,600	2.8	81.6	862.40	60,300	2.4	87.4	667.10
1988	116,220	2.1	86.3	784.50	68,760	2.2	83.8	867.70	47,460	1.9	89.3	664.00
1987	97,910	1.8	88.0	777.80	59,020	1.9	85.8	855.50	38,890	1.6	90.9	659.70
1986	89,780	1.6	89.7	755.10	55,200	1.8	87.6	826.00	34,580	1.4	92.3	642.00
1985	80,300	1.5	91.1	733.10	50,370	1.6	89.2	794.70	29,930	1.2	93.5	629.50
1984	69,950	1.3	92.4	719.60	45,040	1.5	90.7	774.40	24,910	1.0	94.5	620.60
1983	56,150	1.0	93.4	723.30	37,280	1.2	91.9	772.30	18,870	0.8	95.2	626.70
1982	45,730	0.8	94.2	727.50	30,500	1.0	92.9	776.40	15,230	0.6	95.9	629.70
1981	37,750	0.7	94.9	757.10	25,260	0.8	93.7	808.00	12,490	0.5	96.4	654.10
1980	38,140	0.7	95.6	801.70	25,470	0.8	94.5	854.10	12,670	0.5	96.9	696.20
1979	34,670	0.6	96.2	922.60	23,320	0.8	95.3	976.60	11,350	0.5	97.3	811.50
1978	31,590	0.6	96.8	998.00	21,110	0.7	96.0	1,047.10	10,480	0.4	97.8	899.00
1977	29,890	0.5	97.3	975.80	19,960	0.7	96.6	1,032.60	9,930	0.4	98.2	861.80
1976	30,450	0.6	97.9	929.80	20,880	0.7	97.3	978.20	9,570	0.4	98.6	824.40
1975	26,740	0.5	98.3	877.90	18,310	0.6	97.9	915.60	8,430	0.3	98.9	796.10
1974	22,410	0.4	98.8	857.30	15,380	0.5	98.4	889.10	7,030	0.3	99.2	787.60
1973	18,500	0.3	99.1	816.50	12,420	0.4	98.8	847.50	6,080	0.2	99.4	753.10
1972	12,540	0.2	99.3	811.80	8,810	0.3	99.1	840.00	3,730	0.2	99.6	745.30
1971	11,130	0.2	99.5	800.60	7,910	0.3	99.4	816.90	3,220	0.1	99.7	760.50
1970	8,490	0.2	99.7	754.50	6,080	0.2	99.6	765.60	2,410	0.1	99.8	726.60
1969	6,570	0.1	99.8	701.70	4,850	0.2	99.7	704.30	1,720	0.1	99.9	694.70
1968	8,190	0.1	99.9	659.80	6,060	0.2	99.9	667.30	2,130	0.1	100.0	638.30
1967	1,580	^b	100.0	738.90	1,270	^b	99.9	754.90	310	^b	100.0	673.10
1966	870	^b	100.0	717.80	640	^b	100.0	733.50	230	^b	100.0	673.90
1965	530	^b	100.0	671.10	360	^b	100.0	655.00	170	^b	100.0	705.30

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

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

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D2—Number and percentage distribution, by monthly benefit and sex, December 2002

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	5,535,860	100.0	3,069,140	100.0	2,466,720	100.0
Less than 300.00	221,810	4.0	75,160	2.4	146,650	5.9
300.00–349.90	109,440	2.0	37,970	1.2	71,470	2.9
350.00–399.90	115,630	2.1	40,330	1.3	75,300	3.1
400.00–449.90	135,840	2.5	50,680	1.7	85,160	3.5
450.00–499.90	265,250	4.8	96,420	3.1	168,830	6.8
500.00–549.90	354,030	6.4	133,810	4.4	220,220	8.9
550.00–599.90	372,220	6.7	152,220	5.0	220,000	8.9
600.00–649.90	364,290	6.6	160,100	5.2	204,190	8.3
650.00–699.90	346,740	6.3	160,210	5.2	186,530	7.6
700.00–749.90	324,240	5.9	161,750	5.3	162,490	6.6
750.00–799.90	300,370	5.4	157,070	5.1	143,300	5.8
800.00–849.90	277,390	5.0	152,170	5.0	125,220	5.1
850.00–899.90	254,310	4.6	148,150	4.8	106,160	4.3
900.00–949.90	230,920	4.2	139,670	4.6	91,250	3.7
950.00–999.90	213,640	3.9	135,930	4.4	77,710	3.2
1,000.00–1,049.90	197,030	3.6	130,190	4.2	66,840	2.7
1,050.00–1,099.90	174,280	3.1	119,720	3.9	54,560	2.2
1,100.00–1,149.90	155,060	2.8	110,200	3.6	44,860	1.8
1,150.00–1,199.90	142,540	2.6	105,430	3.4	37,110	1.5
1,200.00–1,249.90	136,960	2.5	104,110	3.4	32,850	1.3
1,250.00–1,299.90	138,310	2.5	108,410	3.5	29,900	1.2
1,300.00–1,349.90	150,720	2.7	120,680	3.9	30,040	1.2
1,350.00–1,399.90	126,420	2.3	103,720	3.4	22,700	0.9
1,400.00–1,449.90	113,190	2.0	94,260	3.1	18,930	0.8
1,450.00–1,499.90	98,060	1.8	82,100	2.7	15,960	0.6
1,500.00 or more	217,170	3.9	188,680	6.1	28,490	1.2
Average benefit (dollars)	834.10		935.00		708.60	

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

Table 5.D3—Number and total monthly benefits, by sex, December 1957–2002, selected years

Year	All disabled workers		Men		Women	
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1957	149,850	10,904	121,172	8,903	28,678	2,001
1958	237,719	19,516	189,883	16,138	47,836	3,378
1959	334,443	29,765	264,201	24,417	70,242	5,348
1960	455,371	40,668	356,277	33,034	99,094	7,633
1965	988,074	96,599	734,047	74,946	254,027	21,656
1970	1,492,948	196,010	1,068,986	148,194	423,962	47,819
1975	2,488,774	562,180	1,710,923	418,013	777,851	144,167
1980	2,858,680	1,059,792	1,928,030	784,266	930,650	275,525
1985	2,656,638	1,285,375	1,784,750	953,156	871,888	332,219
1986	2,728,463	1,331,144	1,826,835	985,003	901,628	346,141
1987	2,785,859	1,415,811	1,857,172	1,044,647	928,687	371,165
1988	2,830,284	1,498,637	1,876,878	1,101,675	953,406	396,962
1989	2,895,364	1,609,780	1,906,379	1,176,403	988,985	433,376
1990	3,011,294	1,768,313	1,967,408	1,283,579	1,043,886	484,735
1991	3,194,938	1,946,823	2,067,777	1,401,006	1,127,161	545,817
1992	3,467,783	2,171,080	2,219,789	1,546,924	1,247,994	624,156
1993	3,725,966	2,390,829	2,357,332	1,685,025	1,368,634	705,804
1994	3,962,954	2,620,982	2,473,061	1,824,195	1,489,893	796,787
1995	4,185,263	2,853,365	2,568,359	1,956,168	1,616,904	897,197
1996	4,385,623	3,087,223	2,644,454	2,083,123	1,741,169	1,004,100
1997	4,508,134	3,252,919	2,666,486	2,158,017	1,841,648	1,094,902
1998	4,698,319	3,444,259	2,737,296	2,252,129	1,961,023	1,192,130
1999	4,879,455	3,679,691	2,801,163	2,371,141	2,078,292	1,308,550
2000	5,042,334	3,965,304	2,856,411	2,521,252	2,185,923	1,444,052
2001	5,274,183	4,295,600	2,951,833	2,697,162	2,322,350	1,598,438
2002	5,543,981	4,625,445	3,070,001	2,872,308	2,473,980	1,753,137

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2002, selected years

Year	Number (thousands)	Average age	Percentage distribution							
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–64
<i>Men</i>										
1957	121	59.4	100.0	...	...	...	...	18.5	29.9	51.6
1958	190	59.5	100.0	...	...	...	...	18.2	29.7	52.1
1959	264	59.3	100.0	...	...	...	...	19.0	30.7	50.3
1960	356	57.3	100.0	0.5	3.3	3.0	4.9	16.6	26.7	44.9
1965	734	54.4	100.0	1.0	7.5	7.6	10.4	15.4	24.7	33.3
1970	1,069	53.9	100.0	3.3	6.8	6.9	10.9	15.2	23.2	33.7
1975	1,711	53.5	100.0	4.6	7.5	6.2	9.7	15.8	23.2	33.0
1980	1,928	52.9	100.0	4.1	9.6	6.0	8.9	14.3	24.0	33.1
1985	1,785	51.9	100.0	4.6	12.3	7.3	8.6	12.9	21.4	32.9
1986	1,827	51.4	100.0	4.9	13.3	7.9	8.9	12.7	20.7	31.5
1987	1,857	51.1	100.0	4.8	13.8	8.5	9.4	12.5	20.1	30.8
1988	1,869	50.9	100.0	4.7	14.3	9.0	9.8	12.7	19.6	29.9
1989	1,906	50.7	100.0	4.5	14.7	9.6	10.3	12.7	19.4	28.8
1990	1,965	50.4	100.0	4.5	15.2	10.3	10.7	12.7	19.1	27.5
1991	2,066	50.1	100.0	4.5	15.6	10.7	11.2	13.0	18.6	26.4
1992	2,221	49.9	100.0	4.6	16.0	11.0	12.0	13.4	18.0	25.0
1993	2,358	49.6	100.0	4.6	16.2	11.2	12.3	13.9	17.9	23.9
1994	2,476	49.6	100.0	4.3	16.1	11.4	12.8	14.2	17.8	23.4
1995	2,573	49.7	100.0	4.0	15.5	11.5	13.4	14.5	18.0	23.2
1996	2,650	49.9	100.0	3.6	14.8	11.6	13.7	15.0	18.3	22.9
1997	2,671	50.2	100.0	3.3	13.9	11.6	13.6	15.7	18.9	23.0
1998	2,741	50.5	100.0	3.1	13.3	11.6	13.7	16.1	19.4	22.9
1999	2,802	50.6	100.0	2.9	12.6	11.6	13.8	16.7	19.7	22.9
2000	2,857	50.7	100.0	2.8	11.8	11.5	13.9	17.3	20.0	22.8
2001	2,952	50.9	100.0	2.9	11.2	11.1	14.0	17.4	20.5	23.0
2002	3,069	51.0	100.0	3.1	10.5	10.7	14.0	17.2	21.1	23.3
<i>Women</i>										
1957	29	57.9	100.0	...	...	...	...	25.6	39.2	35.2
1958	48	58.2	100.0	...	...	...	...	23.8	37.5	38.6
1959	70	58.4	100.0	...	...	...	...	23.4	36.8	39.7
1960	99	56.7	100.0	0.3	3.2	3.2	5.3	19.4	31.4	37.2
1965	254	55.2	100.0	0.6	5.4	6.3	9.8	16.2	27.3	34.3
1970	424	55.0	100.0	1.9	5.1	5.6	10.1	15.9	26.0	35.3
1975	778	54.4	100.0	3.3	6.1	5.3	9.0	16.3	25.5	34.5
1980	931	53.7	100.0	3.4	8.2	5.3	8.2	14.4	25.4	35.0
1982	858	53.9	100.0	3.3	8.5	5.1	7.2	13.7	25.2	37.0
1983	838	53.6	100.0	3.5	9.3	5.7	7.5	12.9	24.3	36.8
1984	849	53.2	100.0	3.7	10.2	6.3	7.8	12.8	23.2	36.0
1985	872	52.6	100.0	3.8	11.2	6.9	8.3	12.9	22.3	34.6
1986	902	52.0	100.0	4.1	12.1	7.6	8.8	12.9	21.6	32.9
1987	929	51.7	100.0	4.2	12.7	8.2	9.4	12.9	20.9	31.7
1988	952	51.4	100.0	4.0	13.1	8.7	9.9	13.2	20.6	30.5
1989	989	51.1	100.0	4.0	13.5	9.2	10.6	13.4	20.1	29.2
1990	1,046	50.8	100.0	3.9	14.0	9.8	11.1	13.4	19.9	27.9
1991	1,133	50.5	100.0	4.0	14.3	10.3	11.6	13.8	19.4	26.5
1992	1,252	50.1	100.0	4.3	14.6	10.7	12.2	14.3	18.8	25.0
1993	1,371	49.9	100.0	4.3	14.9	11.0	12.6	14.8	18.9	23.5
1994	1,491	49.9	100.0	4.1	14.8	11.2	13.1	15.3	18.7	22.8
1995	1,614	49.9	100.0	3.8	14.5	11.5	13.6	15.7	18.8	22.2
1996	1,736	50.0	100.0	3.4	14.1	11.6	13.9	16.2	19.0	21.7
1997	1,835	50.2	100.0	3.1	13.3	11.6	14.0	16.8	19.6	21.5
1998	1,956	50.5	100.0	3.0	12.8	11.5	14.2	17.0	20.0	21.6
1999	2,071	50.5	100.0	2.8	12.1	11.5	14.3	17.5	20.4	21.5
2000	2,179	50.7	100.0	2.7	11.5	11.3	14.5	17.9	20.7	21.5
2001	2,313	50.8	100.0	2.7	11.1	11.1	14.4	18.0	21.1	21.6
2002	2,467	50.9	100.0	2.7	10.6	10.8	14.4	17.8	21.5	22.1

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2002 are based on a 10 percent sample. All other years are 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

Table 5.D4.1—Number and percentage distribution of disabled beneficiaries, by diagnostic group and type of beneficiary, December 2002

Diagnostic group	All disabled beneficiaries	Disabled workers	Disabled widow(er)s	Disabled adult children
	<i>Number</i>			
Total	6,491,494	5,539,597	207,365	744,532
Congenital anomalies	16,606	9,226	267	7,113
Endocrine, nutritional, and metabolic diseases	259,335	237,020	19,634	2,681
Infectious and parasitic diseases ^a	107,013	102,589	1,695	2,729
Injuries	262,822	248,544	5,171	9,107
Mental disorders				
Retardation	620,423	286,210	9,679	324,534
Other	1,701,328	1,558,928	45,274	97,126
Neoplasms	156,080	150,138	4,262	1,680
Diseases of the—				
Blood and blood-forming organs	15,916	13,708	354	1,854
Circulatory system	584,316	558,736	22,348	3,232
Digestive system	83,152	80,396	2,227	529
Genitourinary system	97,239	93,645	1,837	1,757
Musculoskeletal system and connective tissue	1,385,191	1,324,762	55,677	4,752
Nervous system and sense organs	612,180	533,774	14,527	63,879
Respiratory system	188,897	176,941	11,054	902
Skin and subcutaneous tissue	14,188	13,429	510	249
Other	10,715	9,447	214	1,054
Unknown ^b	376,093	142,104	12,635	221,354
	<i>Percent</i>			
Total	100.0	100.0	100.0	100.0
Congenital anomalies	0.3	0.2	0.1	1.0
Endocrine, nutritional, and metabolic diseases	4.0	4.3	9.5	0.4
Infectious and parasitic diseases ^a	1.6	1.9	0.8	0.4
Injuries	4.0	4.5	2.5	1.2
Mental disorders				
Retardation	9.6	5.2	4.7	43.6
Other	26.2	28.1	21.8	13.0
Neoplasms	2.4	2.7	2.1	0.2
Diseases of the—				
Blood and blood-forming organs	0.2	0.2	0.2	0.2
Circulatory system	9.0	10.1	10.8	0.4
Digestive system	1.3	1.5	1.1	0.1
Genitourinary system	1.5	1.7	0.9	0.2
Musculoskeletal system and connective tissue	21.3	23.9	26.8	0.6
Nervous system and sense organs	9.4	9.6	7.0	8.6
Respiratory system	2.9	3.2	5.3	0.1
Skin and subcutaneous tissue	0.2	0.2	0.2	^c
Other	0.2	0.2	0.1	0.1
Unknown ^b	5.8	2.6	6.1	29.7

a. AIDS/HIV records are counted in the infectious and parasitic diseases group. Before 1990, those records were included in the Other group.

b. 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.

c. Less than 0.05 percent.

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

CONTACT: Linda Martin (410) 965-2535.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D5—Number and percentage distribution, by diagnostic group, and sex, December 2002

Diagnostic group	Number			Percent		
	Total	Men	Women	Total	Men	Women
All disabled workers	5,539,597	3,067,251	2,472,346	100.0	100.0	100.0
Congenital anomalies	9,226	4,837	4,389	0.2	0.2	0.2
Endocrine, nutritional, and metabolic diseases	237,020	98,936	138,084	4.3	3.2	5.6
Infectious and parasitic diseases ^a	102,589	77,584	25,005	1.9	2.5	1.0
Injuries	248,544	177,071	71,473	4.5	5.8	2.9
Mental disorders						
Retardation	286,210	188,430	97,780	5.2	6.1	4.0
Other	1,558,928	816,141	742,787	28.1	26.6	30.0
Neoplasms	150,138	73,149	76,989	2.7	2.4	3.1
Diseases of the—						
Blood and blood-forming organs	13,708	6,416	7,292	0.2	0.2	0.3
Circulatory system	558,736	379,306	179,430	10.1	12.4	7.3
Digestive system	80,396	43,823	36,573	1.5	1.4	1.5
Genitourinary system	93,645	56,726	36,919	1.7	1.8	1.5
Musculoskeletal system and connective tissue	1,324,762	696,529	628,233	23.9	22.7	25.4
Nervous system and sense organs	533,774	271,690	262,084	9.6	8.9	10.6
Respiratory system	176,941	90,828	86,113	3.2	3.0	3.5
Skin and subcutaneous tissue	13,429	5,536	7,893	0.2	0.2	0.3
Other	9,447	4,808	4,639	0.2	0.2	0.2
Unknown	142,104	75,441	66,663	2.6	2.5	2.7

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, those records were included in the Other group.

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

CONTACT: Linda Martin (410) 965-2535.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D6—Number and percentage distribution, by sex, diagnostic group, and age, December 2002

Diagnostic group	All ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–64
All disabled workers								
Total								
Number	5,539,597	167,182	584,363	597,861	783,590	968,489	1,179,445	1,258,667
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	0.2	0.7	0.3	0.2	0.1	0.1	0.1	0.1
Endocrine, nutritional, and metabolic diseases	4.3	1.7	2.7	3.3	3.9	4.7	5.1	4.9
Infectious and parasitic diseases ^a	1.9	1.1	3.7	3.5	2.5	1.7	1.1	0.7
Injuries	4.5	6.3	5.9	5.4	4.6	4.1	3.9	3.9
Mental disorders								
Retardation	5.2	19.5	11.3	7.6	5.9	4.2	2.7	1.8
Other	28.1	43.0	40.5	38.3	35.4	30.4	22.2	14.9
Neoplasms	2.7	2.4	1.9	2.1	2.4	2.7	3.1	3.3
Diseases of the—								
Blood and blood-forming organs	0.2	1.0	0.5	0.3	0.2	0.2	0.2	0.1
Circulatory system	10.1	1.8	2.7	3.9	5.8	9.0	13.5	17.8
Digestive system	1.5	1.0	1.3	1.6	1.9	1.7	1.3	1.2
Genitourinary system	1.7	2.7	2.5	2.0	1.9	1.8	1.4	1.1
Musculoskeletal system and connective tissue	23.9	4.2	11.7	17.7	20.3	23.7	29.1	32.7
Nervous system and sense organs	9.6	11.7	11.6	10.4	10.1	9.8	9.0	8.3
Respiratory system	3.2	0.7	0.9	1.3	1.8	2.6	4.3	5.8
Skin and subcutaneous tissue	0.2	0.2	0.3	0.3	0.3	0.3	0.2	0.2
Other	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.1
Unknown	2.6	1.7	1.9	2.2	2.6	2.7	2.7	2.9
Men								
Subtotal								
Number	3,067,251	94,975	321,240	331,233	430,073	529,700	647,716	712,314
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	0.2	0.7	0.3	0.2	0.1	0.1	0.1	0.1
Endocrine, nutritional, and metabolic diseases	3.2	1.2	2.2	2.6	3.1	3.5	3.8	3.6
Infectious and parasitic diseases ^a	2.5	1.3	5.4	5.2	3.7	2.3	1.2	0.8
Injuries	5.8	8.2	8.0	7.2	6.2	5.4	4.9	4.6
Mental disorders								
Retardation	6.1	20.4	13.0	9.1	7.2	5.2	3.4	2.3
Other	26.6	43.7	39.0	36.3	33.5	29.6	20.9	13.1
Neoplasms	2.4	2.3	1.6	1.6	1.9	2.3	2.7	3.1
Diseases of the—								
Blood and blood-forming organs	0.2	0.8	0.4	0.3	0.2	0.2	0.1	0.1
Circulatory system	12.4	1.8	2.8	4.4	6.7	10.9	16.9	22.3
Digestive system	1.4	0.7	1.0	1.5	2.0	1.9	1.3	1.2
Genitourinary system	1.8	2.6	2.7	2.2	2.2	2.0	1.6	1.2
Musculoskeletal system and connective tissue	22.7	2.9	10.6	17.2	20.1	22.6	27.6	30.6
Nervous system and sense organs	8.9	11.1	10.3	9.1	9.0	8.9	8.4	8.1
Respiratory system	3.0	0.4	0.6	1.0	1.4	2.3	4.0	5.8
Skin and subcutaneous tissue	0.2	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Other	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.1
Unknown	2.5	1.6	1.6	1.9	2.4	2.6	2.6	3.0
Women								
Subtotal								
Number	2,472,346	72,207	263,123	266,628	353,517	438,789	531,729	546,353
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	0.2	0.8	0.4	0.2	0.1	0.1	0.1	0.1
Endocrine, nutritional, and metabolic diseases	5.6	2.3	3.4	4.1	5.0	6.2	6.7	6.5
Infectious and parasitic diseases ^a	1.0	0.9	1.6	1.4	1.1	1.1	0.8	0.7
Injuries	2.9	3.8	3.4	3.2	2.8	2.6	2.6	3.0
Mental disorders								
Retardation	4.0	18.4	9.2	5.6	4.4	3.0	1.9	1.3
Other	30.0	42.1	42.4	40.7	37.7	31.4	23.7	17.4
Neoplasms	3.1	2.5	2.3	2.6	2.9	3.2	3.5	3.6
Diseases of the—								
Blood and blood-forming organs	0.3	1.3	0.5	0.3	0.3	0.2	0.2	0.2
Circulatory system	7.3	1.9	2.6	3.4	4.7	6.7	9.4	12.1
Digestive system	1.5	1.4	1.6	1.7	1.8	1.6	1.3	1.2
Genitourinary system	1.5	2.8	2.3	1.8	1.6	1.5	1.2	1.0
Musculoskeletal system and connective tissue	25.4	5.9	13.0	18.2	20.6	25.1	31.0	35.4
Nervous system and sense organs	10.6	12.6	13.2	11.9	11.4	10.9	9.7	8.5
Respiratory system	3.5	1.0	1.3	1.7	2.2	3.1	4.6	5.8
Skin and subcutaneous tissue	0.3	0.3	0.4	0.4	0.4	0.3	0.3	0.3
Other	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.1
Unknown	2.7	1.8	2.2	2.5	2.8	2.9	2.8	2.9

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, those records were included in the Other group.

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

CONTACT: Linda Martin (410) 965-2535.

5.E OASDI Current-Pay Benefits: Disabled Workers and Dependents

Table 5.E1—Number and percentage distribution, by primary insurance amount and type of benefit, December 2002

Primary insurance amount (dollars)	Disabled workers		Spouses		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	5,535,860	100.0	151,260	100.0	1,533,090	100.0
Less than 300.00	208,190	3.8	60	^a	520	^a
300.00–349.90	112,670	2.0	200	0.1	1,600	0.1
350.00–399.90	112,070	2.0	90	0.1	970	0.1
400.00–449.90	131,580	2.4	220	0.1	2,060	0.1
450.00–499.90	265,870	4.8	1,790	1.2	31,630	2.1
500.00–549.90	356,080	6.4	4,970	3.3	94,100	6.1
550.00–599.90	369,960	6.7	6,810	4.5	122,690	8.0
600.00–649.90	360,610	6.5	8,030	5.3	126,740	8.3
650.00–699.90	343,100	6.2	8,300	5.5	123,520	8.1
700.00–749.90	322,160	5.8	8,460	5.6	116,190	7.6
750.00–799.90	296,840	5.4	8,010	5.3	105,280	6.9
800.00–849.90	275,950	5.0	8,360	5.5	98,900	6.5
850.00–899.90	255,520	4.6	7,520	5.0	91,010	5.9
900.00–949.90	230,880	4.2	7,160	4.7	79,650	5.2
950.00–999.90	214,740	3.9	7,030	4.6	70,690	4.6
1,000.00–1,049.90	197,520	3.6	6,780	4.5	63,300	4.1
1,050.00–1,099.90	176,060	3.2	6,040	4.0	54,580	3.6
1,100.00–1,149.90	157,370	2.8	5,340	3.5	46,380	3.0
1,150.00–1,199.90	145,200	2.6	5,520	3.6	40,860	2.7
1,200.00–1,249.90	138,240	2.5	5,870	3.9	36,360	2.4
1,250.00–1,299.90	142,300	2.6	5,970	3.9	36,320	2.4
1,300.00–1,349.90	153,230	2.8	7,240	4.8	38,270	2.5
1,350.00–1,399.90	129,250	2.3	6,440	4.3	33,250	2.2
1,400.00–1,449.90	115,770	2.1	6,760	4.5	29,970	2.0
1,450.00–1,499.90	101,390	1.8	5,830	3.9	24,990	1.6
1,500.00 or more	223,310	4.0	12,460	8.2	63,260	4.1
Average primary insurance amount (dollars)	839.50		1,024.60		888.40	

a. Less than 0.05 percent.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.E2—Average monthly benefit, by type of benefit, sex, and age, December 1957–2002, selected years (in dollars)

Year	Disabled workers			Spouses		Children			
	All	Men	Women	Wives	Husbands	All	Under age 18	Disabled adult children	Students
1957	72.80	73.50	69.80	...	...	...	...	...	...
1958	82.10	85.00	70.60	34.00	33.90	27.30	27.30	38.50	...
1959	89.00	92.40	76.10	36.10	34.70	31.00	30.80	39.40	...
1960	89.30	92.70	77.00	34.40	34.70	30.20	30.00	39.00	...
1965	97.80	102.10	85.30	35.00	32.60	31.60	30.90	41.60	49.30
1970	131.30	138.60	112.80	42.60	42.40	38.60	36.90	53.30	54.10
1975	225.90	244.30	185.30	67.40	61.70	62.00	58.60	84.10	86.90
1980	370.70	406.80	296.10	110.60	91.80	110.30	104.60	136.00	152.40
1985	483.80	534.10	381.00	132.70	102.70	141.80	138.90	183.80	196.90
1990	587.20	652.40	464.40	151.30	96.90	163.80	158.80	231.40	250.00
1991	609.40	677.50	484.20	154.60	101.70	167.90	162.70	240.90	253.20
1992	626.10	696.90	500.10	156.40	106.00	170.20	165.10	246.80	262.00
1993	641.70	714.80	515.70	157.50	108.60	173.10	167.70	253.30	265.90
1994	661.40	731.60	534.80	161.00	112.60	177.70	172.20	261.50	273.80
1995	681.80	761.60	554.90	165.00	116.60	183.50	177.90	270.10	284.10
1996	703.90	787.70	576.70	172.60	124.50	193.50	187.70	281.70	295.00
1997	721.60	809.30	594.50	178.00	129.10	201.20	195.20	292.20	306.30
1998	733.10	822.80	607.90	183.00	136.50	207.50	201.40	300.20	313.10
1999	754.10	846.50	629.60	190.20	145.40	216.10	209.50	310.70	319.80
2000	786.40	882.70	660.60	199.50	155.90	227.60	220.80	325.60	336.00
2001	814.50	913.70	688.30	208.20	164.50	237.90	230.70	339.90	343.50
2002	834.30	935.60	708.60	213.70	168.50	245.00	237.40	349.10	350.10

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F1—Number of wives and husbands and total monthly benefits, by type of benefit, December 1950–2002, selected years

Year	Total		Wives entitled solely because of age ^a		Wives entitled because of children ^b					Husbands		
					Subtotal		With at least 1 child under age 16 ^c		With at least 1 disabled child ^d			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
Wives and husbands of retired workers												
1950	508,350	11,995	498,688	11,865	8,865	114	8,865	114	...	...	797	16
1955	1,191,963	39,416	1,124,616	37,826	57,284	1,315	57,284	1,315	...	...	10,063	274
1960	2,269,384	87,867	2,143,949	84,018	110,909	3,344	101,774	3,010	9,135	334	14,526	504
1965	2,613,550	114,035	2,433,602	108,069	168,951	5,508	154,829	4,947	14,122	561	10,997	458
1970	2,668,105	163,263	2,491,724	155,510	167,968	7,261	154,919	6,542	13,049	719	8,413	492
1975	2,867,388	301,623	2,664,132	287,043	195,993	13,861	178,909	12,391	17,084	1,470	7,263	720
1980	3,015,549	518,500	2,789,472	490,818	186,894	22,508	167,793	19,708	19,101	2,800	39,183	5,174
1985	3,069,067	755,844	2,926,300	732,464	107,166	17,347	84,074	12,762	23,092	4,585	35,601	6,033
1986	3,086,091	776,870	2,948,854	754,026	102,549	16,933	79,471	12,304	23,078	4,629	34,688	5,911
1987	3,089,968	817,058	2,959,301	794,258	96,928	16,865	74,141	12,078	22,787	4,788	33,739	5,935
1988	3,086,022	854,644	2,959,856	831,659	93,577	17,071	71,585	12,266	21,992	4,805	32,589	5,914
1989	3,093,075	905,281	2,971,440	881,836	89,839	17,431	68,857	12,571	20,982	4,859	31,796	6,014
1990	3,101,085	964,983	2,982,034	940,514	87,925	18,300	67,785	13,322	20,140	4,977	31,126	6,169
1991	3,104,235	1,008,672	2,986,975	983,434	86,682	19,020	66,992	13,897	19,690	5,122	30,578	6,218
1992	3,111,515	1,047,553	2,995,629	1,021,616	85,680	19,648	66,618	14,468	19,062	5,180	30,206	6,289
1993	3,094,447	1,075,073	2,980,671	1,048,712	83,751	19,993	65,225	14,782	18,526	5,211	30,025	6,368
1994	3,066,430	1,101,203	2,954,950	1,074,452	81,644	20,296	63,575	15,033	18,069	5,263	29,836	6,455
1995	3,026,012	1,120,924	2,917,764	1,094,203	78,507	20,155	61,132	14,932	17,375	5,223	29,741	6,567
1996	2,970,226	1,139,092	2,872,316	1,113,470	68,310	18,942	52,384	13,874	15,926	5,068	29,600	6,680
1997	2,922,170	1,148,558	2,828,261	1,123,381	64,123	18,363	49,372	13,540	14,751	4,823	29,786	6,814
1998	2,864,230	1,145,353	2,773,583	1,120,553	60,634	17,883	46,649	13,205	13,985	4,678	30,013	6,917
1999	2,811,008	1,155,479	2,722,244	1,130,413	58,229	17,905	45,002	13,333	13,227	4,572	30,535	7,161
2000	2,798,203	1,200,835	2,707,444	1,173,771	58,416	19,212	45,680	14,547	12,736	4,665	32,343	7,851
2001	2,741,962	1,213,842	2,652,289	1,186,078	55,995	19,335	44,009	14,732	11,986	4,603	33,678	8,429
2002	2,681,153	1,210,108	2,591,336	1,181,531	54,683	19,579	43,212	15,022	11,471	4,557	35,143	8,998
Wives and husbands of disabled workers												
1958	12,231	415	4,845	192	7,370	223	7,345	222	25	1	16	1
1960	76,599	2,636	21,845	841	54,543	1,788	53,549	1,746	994	42	211	7
1965	193,362	6,761	29,352	1,109	163,500	5,635	160,922	5,512	2,578	123	510	17
1970	283,447	12,060	41,582	2,063	241,341	9,975	235,892	9,667	5,449	307	524	22
1975	452,922	30,536	64,883	5,263	387,474	25,239	380,763	24,633	6,711	606	565	35
1980	461,878	51,028	77,276	9,672	382,457	41,159	374,147	40,018	8,310	1,142	2,145	197
1985	305,532	40,507	79,294	12,693	224,704	27,656	215,012	26,055	9,692	1,602	1,534	158
1986	300,826	39,481	78,925	12,766	220,426	26,566	210,515	24,952	9,911	1,614	1,475	149
1987	290,888	39,195	73,484	12,808	211,222	25,854	201,280	24,194	9,942	1,661	6,182	532
1988	280,821	38,878	70,654	12,924	203,788	25,402	194,068	23,746	9,720	1,656	6,379	552
1989	271,488	39,148	67,154	12,974	197,946	25,590	188,562	23,916	9,384	1,674	6,388	584
1990	265,890	39,869	63,584	13,018	195,818	26,222	186,641	24,506	9,177	1,716	6,488	629
1991	266,219	40,792	60,866	13,020	198,457	27,071	189,401	25,321	9,056	1,750	6,896	701
1992	270,674	41,951	59,536	13,196	203,703	27,967	194,459	26,152	9,244	1,815	7,435	788
1993	272,759	42,570	58,052	13,241	206,975	28,490	197,589	26,616	9,386	1,874	7,732	839
1994	271,054	43,263	56,343	13,367	206,854	29,011	197,492	27,094	9,362	1,917	7,857	885
1995	263,539	43,105	53,882	13,300	201,827	28,892	192,573	26,962	9,254	1,929	7,830	913
1996	223,854	38,366	51,779	13,251	166,586	24,432	158,106	22,597	8,480	1,834	5,489	683
1997	206,959	36,585	51,265	13,251	150,647	22,683	142,717	20,928	7,930	1,755	5,047	651
1998	189,843	34,530	50,759	13,197	134,584	20,718	127,083	19,032	7,501	1,686	4,500	614
1999	176,299	33,336	50,165	13,314	121,906	19,407	114,842	17,781	7,064	1,626	4,228	615
2000	165,123	32,763	49,171	13,488	111,933	18,649	105,248	17,044	6,685	1,605	4,019	626
2001	156,899	32,491	48,597	13,794	104,271	18,034	97,942	16,460	6,329	1,574	4,031	663
2002	151,614	32,209	48,402	13,970	99,075	17,542	93,034	16,008	6,041	1,533	4,137	697

a. Aged 62 or older. Includes wives aged 65 or older with children.

b. Under age 65 with entitled children in their care.

c. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.

d. Excludes wives with both disabled and nondisabled children in their care.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F3—Percentage distribution of wives with entitlement based on age, by monthly benefit and age, December 2002

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
Total							
Number	2,642,810	306,150	715,980	689,060	528,860	288,030	114,730
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 150.00	5.6	10.4	6.3	4.7	4.4	3.9	3.5
150.00–174.90	1.5	2.0	1.6	1.5	1.3	1.5	1.8
175.00–199.90	2.0	2.8	2.1	1.9	1.7	1.7	1.5
200.00–224.90	2.2	2.7	2.3	2.0	2.0	2.0	1.7
225.00–249.90	2.4	2.8	2.4	2.3	2.4	2.3	2.2
250.00–274.90	2.5	2.8	2.6	2.4	2.4	2.4	2.6
275.00–299.90	2.6	2.9	2.7	2.6	2.5	2.7	2.5
300.00–324.90	2.9	3.1	2.9	2.9	2.8	2.8	2.9
325.00–349.90	3.2	3.4	3.2	3.2	3.2	3.2	3.3
350.00–374.90	3.6	3.5	3.5	3.5	3.6	3.8	4.8
375.00–399.90	4.1	3.9	3.6	4.0	4.2	4.6	5.7
400.00–424.90	4.8	4.2	4.2	4.6	5.5	5.9	5.8
425.00–449.90	6.5	4.4	4.6	6.0	9.3	9.3	6.0
450.00–474.90	7.4	4.9	5.3	7.7	11.4	8.5	5.3
475.00–499.90	8.8	7.4	8.1	11.5	9.0	6.9	5.4
500.00–524.90	8.6	8.2	10.3	10.6	6.0	6.4	5.0
525.00–549.90	6.1	8.1	8.4	5.5	3.9	4.7	4.3
550.00–574.90	4.5	6.9	5.2	3.5	3.4	4.2	4.5
575.00–599.90	3.6	5.8	3.2	2.9	3.2	4.1	4.2
600.00–624.90	3.1	4.1	2.5	2.7	3.0	4.2	4.0
625.00–649.90	2.8	2.2	2.5	2.5	3.2	3.6	3.5
650.00–674.90	2.5	1.2	2.5	2.5	2.9	2.8	3.9
675.00–699.90	2.1	0.8	2.2	2.1	2.6	1.8	2.5
700.00–724.90	1.7	0.5	1.9	1.9	1.9	1.1	2.2
725.00–749.90	1.3	0.3	1.6	1.7	1.1	0.9	1.5
750.00–774.90	1.1	0.2	1.6	1.3	0.8	0.7	1.3
775.00–799.90	1.1	0.1	1.8	1.2	0.6	0.6	1.0
800.00 or more	1.6	0.1	1.0	1.0	1.6	3.4	7.3
Average benefit (dollars)	453.20	410.90	454.30	456.40	455.10	465.60	499.10

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2002, selected years

Year	Number of children of—				Total monthly benefits for children of— (thousands of dollars)			
	All workers	Retired workers	Deceased workers	Disabled workers	All workers	Retired workers	Deceased workers	Disabled workers
Total								
1957	1,502,077	179,697	1,322,380	...	57,951	3,932	54,019	...
1960	2,000,451	268,168	1,576,802	155,481	93,276	7,576	81,003	4,697
1965	3,092,659	460,781	2,074,263	557,615	159,428	14,736	127,067	17,627
1970	4,122,305	545,708	2,687,997	888,600	279,845	24,473	221,041	34,330
1980	4,606,517	638,711	2,609,920	1,357,886	864,242	89,386	625,090	149,766
1990	3,187,010	422,200	1,776,013	988,797	991,628	109,497	720,206	161,926
1995	3,734,097	441,600	1,883,643	1,408,854	1,283,288	141,974	882,837	258,477
1996	3,802,791	442,567	1,897,667	1,462,557	1,356,685	149,177	924,491	283,017
1997	3,771,774	441,121	1,892,707	1,437,946	1,389,552	153,949	946,325	289,278
1998	3,768,928	438,726	1,883,794	1,446,408	1,417,362	157,230	959,939	300,194
1999	3,794,795	442,016	1,884,803	1,467,976	1,473,988	164,755	991,963	317,270
2000	3,802,863	458,951	1,878,007	1,465,905	1,547,808	181,177	1,033,055	333,575
2001	3,839,381	467,064	1,890,156	1,482,161	1,624,285	192,727	1,078,886	352,672
2002	3,910,256	476,684	1,907,899	1,525,673	1,692,471	203,265	1,115,415	373,791
Children under age 18								
1940	54,648	6,410	48,238	...	668	62	606	...
1950	699,703	46,241	653,462	...	19,366	788	18,578	...
1960	1,896,397	214,343	1,529,535	152,519	88,682	5,654	78,446	4,582
1965	2,688,592	339,507	1,816,888	532,197	135,432	9,586	109,392	16,442
1970	3,314,578	354,373	2,161,094	799,111	215,366	13,367	172,499	29,500
1980	3,423,081	354,797	1,883,438	1,184,846	607,574	40,548	443,097	123,930
1990	2,497,252	236,051	1,333,690	927,511	739,787	53,944	538,546	147,296
1995	2,956,482	241,756	1,386,111	1,328,615	943,028	69,312	637,326	236,390
1996	3,010,100	241,911	1,391,095	1,377,094	997,075	73,297	665,269	258,509
1997	2,969,909	240,031	1,376,186	1,353,692	1,014,245	75,573	674,451	264,221
1998	2,962,704	238,455	1,363,444	1,360,805	1,031,690	77,334	680,264	274,092
1999	2,970,039	240,899	1,353,918	1,375,222	1,066,979	81,648	697,212	288,119
2000	2,976,406	255,908	1,346,091	1,374,407	1,120,977	92,987	724,567	303,423
2001	2,993,852	262,509	1,345,986	1,385,357	1,172,169	100,320	752,216	319,633
2002	3,043,029	270,231	1,350,533	1,422,265	1,218,610	107,298	773,661	337,652
Disabled adult children								
1957	28,869	16,686	12,183	...	1,115	526	589	...
1960	104,054	53,825	47,267	2,962	4,594	1,922	2,557	115
1965	198,390	87,122	102,287	8,981	10,271	3,541	6,357	374
1970	270,557	101,341	154,921	14,295	19,807	5,755	13,290	761
1980	450,169	140,548	276,738	32,883	89,561	22,463	62,625	4,473
1990	600,480	173,941	389,385	37,154	217,201	51,879	156,725	8,597
1995	686,101	188,965	446,377	50,759	300,007	68,743	217,553	13,711
1996	696,787	189,788	454,367	52,632	316,579	71,808	229,947	14,824
1997	704,709	189,780	461,974	52,955	330,258	73,984	240,802	15,472
1998	712,772	189,637	468,705	54,430	341,731	75,663	249,726	16,342
1999	720,526	189,815	474,804	55,907	357,099	78,391	261,339	17,369
2000	728,689	191,584	480,351	56,754	377,647	83,098	276,072	18,478
2001	736,546	191,809	486,817	57,920	395,952	86,510	289,757	19,684
2002	744,529	192,085	492,985	59,459	409,813	89,114	299,946	20,754
Students								
1965	205,677	34,152	155,088	16,437	13,725	1,597	11,318	811
1970	537,170	89,994	371,982	75,194	44,672	5,351	35,252	4,069
1980	733,267	143,366	449,744	140,157	167,107	26,375	119,368	21,363
1990	89,278	12,208	52,938	24,132	34,641	3,673	24,935	6,033
1995	91,514	10,879	51,155	29,480	40,253	3,919	27,958	8,376
1996	95,904	10,868	52,205	32,831	43,032	4,072	29,276	9,684
1997	97,156	11,310	54,547	31,299	45,049	4,393	31,071	9,585
1998	93,452	10,634	51,645	31,173	43,941	4,233	29,949	9,759
1999	104,230	11,302	56,081	36,847	49,910	4,716	33,412	11,782
2000	97,768	11,459	51,565	34,744	49,184	5,092	32,417	11,674
2001	108,983	12,746	57,353	38,884	56,164	5,897	36,912	13,356
2002	122,698	14,368	64,381	43,949	64,048	6,854	41,808	15,386

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2002, selected years (in dollars)

Year	Widowed mothers and fathers	Nondisabled		Parents	Children				Disabled	
		Widows	Widowers		Total	Under age 18	Disabled adult children	Students	Widows	Widowers
1940	19.61	20.28	...	13.09	12.22	12.22	...	...	...	...
1941	19.50	20.22	...	12.97	12.19	12.19	...	...	...	...
1942	19.57	20.15	...	13.05	12.24	12.24	...	...	...	...
1943	19.72	20.15	...	13.11	12.31	12.31	...	...	...	...
1944	19.80	20.17	...	13.08	12.38	12.38	...	...	...	...
1945	19.83	20.19	...	13.06	12.45	12.45	...	...	...	...
1950	34.24	36.54	37.23	36.69	28.43	28.43	...	...	...	...
1951	33.24	36.04	30.03	36.68	28.05	28.05	...	...	...	...
1952	36.13	40.67	33.09	41.33	31.30	31.30	...	...	...	...
1953	37.49	40.88	34.08	41.96	32.28	32.28	...	...	...	...
1954	44.52	46.28	39.27	47.44	37.01	37.01	...	...	...	...
1955	45.91	48.70	46.51	49.93	38.12	38.12	...	...	...	...
1956	47.35	50.14	47.11	50.78	39.36	39.36	...	...	...	...
1957	49.05	51.09	47.77	51.87	40.85	40.78	48.38	...	...	...
1958	50.53	51.91	48.84	52.83	42.10	41.98	49.63	...	...	...
1959	57.37	56.73	53.28	58.86	47.48	47.34	52.89	...	...	...
1960	59.29	57.69	53.81	60.31	51.37	51.29	54.10	...	...	...
1961	59.38	64.92	61.66	67.15	52.74	52.64	55.50	...	...	...
1962	59.38	65.88	62.12	68.18	53.57	53.47	55.99	...	...	...
1963	59.43	66.85	63.17	69.11	54.33	54.23	56.58	...	...	...
1964	59.40	67.85	63.49	70.05	54.99	54.87	57.27	...	...	...
1965	65.46	73.75	69.68	76.03	61.26	60.21	62.14	72.98	...	...
1966	65.59	74.11	70.52	76.52	61.84	60.37	62.67	71.71	...	...
1967	65.86	74.99	71.22	77.23	62.57	60.99	63.37	72.33	...	...
1968	74.93	86.54	82.14	88.21	70.85	68.90	73.11	81.76	72.27	72.40
1969	75.06	87.48	83.08	88.96	71.10	69.11	73.77	81.93	71.02	66.50
1970	86.51	102.02	96.50	103.21	82.23	79.82	85.79	94.77	81.99	73.10
1971	95.61	113.57	106.13	114.26	90.94	88.12	95.03	104.80	90.11	83.10
1972	115.45	138.19	127.98	138.95	110.36	106.87	115.25	126.63	109.50	98.80
1973	118.20	157.40	146.70	140.60	111.70	108.20	116.20	128.50	111.20	101.70
1974	134.20	177.30	164.30	157.50	126.48	122.52	130.33	144.79	125.90	118.60
1975	147.25	193.92	178.27	171.86	139.40	135.00	142.26	157.81	137.70	128.10
1976	159.77	208.99	191.78	185.07	151.94	147.49	152.88	169.80	147.00	133.80
1977	173.80	224.30	177.10	198.30	^a 165.70	^a 161.50	^a 163.60	^a 183.10	156.20	131.60
1978	190.40	241.40	186.10	214.00	182.20	178.30	176.20	200.80	165.70	129.70
1979	212.60	269.80	209.00	238.70	205.60	201.70	195.90	226.60	180.80	133.40
1980	246.20	311.50	239.40	276.00	239.50	235.30	226.40	265.40	205.40	145.70
1981	276.70	349.80	266.80	310.40	270.90	265.70	254.00	301.70	227.20	158.80
1982	302.80	379.30	285.60	335.40	285.40	291.50	279.90	260.70	242.80	165.50
1983	308.70	397.10	295.70	349.80	298.00	307.20	289.00	233.40	251.10	166.20
1984	321.50	416.10	306.80	363.90	314.30	320.70	302.60	257.20	307.70	190.70
1985	332.50	434.00	317.80	378.20	330.50	332.60	315.50	360.80	316.60	191.80
1986	338.30	444.90	324.80	386.30	336.80	338.70	323.10	375.70	321.30	195.50
1987	352.70	468.90	340.60	407.30	352.40	353.90	340.00	400.10	335.60	202.30
1988	367.90	493.40	359.50	428.40	367.60	368.00	357.40	424.70	350.00	211.30
1989	387.60	522.60	382.00	453.50	384.90	384.30	378.10	447.90	368.90	223.60
1990	409.10	557.40	408.40	482.20	405.50	403.80	402.50	471.00	391.30	238.40
1991	424.10	584.50	428.00	506.10	420.10	417.00	421.50	486.20	409.40	260.60
1992	437.70	608.70	443.60	526.40	432.30	427.60	438.30	504.10	425.30	273.30
1993	448.40	631.70	461.50	547.20	443.10	437.00	453.70	515.00	436.90	286.20
1994	464.40	656.60	481.40	569.50	456.20	448.70	470.80	532.20	449.20	299.90
1995	477.90	681.20	500.20	590.80	468.70	459.80	487.40	546.50	461.50	307.60
1996	514.90	708.30	520.70	613.50	487.20	478.20	506.10	560.80	474.30	318.00
1997	532.00	732.50	534.50	635.70	500.00	490.10	521.30	569.60	483.90	326.90
1998	545.10	750.30	549.10	651.10	509.60	498.90	532.80	579.90	491.00	332.90
1999	565.70	776.10	572.40	673.90	526.30	515.00	550.40	595.80	503.90	340.30
2000	595.00	811.80	606.90	703.90	550.10	538.30	574.70	628.70	523.80	361.70
2001	620.80	842.50	636.80	728.60	570.80	558.90	595.20	643.60	541.20	374.80
2002	640.20	862.80	662.80	752.70	584.60	572.90	608.40	649.40	553.00	384.70

a. Children's data estimated for 1977.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F7—Number and percentage distribution of survivors, by primary insurance amount and type of benefit, December 2002

Primary insurance amount (dollars)	Widowed mothers and fathers		Nondisabled widow(er)s		Parents		Disabled widow(er)s		Children	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total	193,270	100.0	4,563,660	100.0	2,350	100.0	205,870	100.0	1,905,050	100.0
Less than 300.00	4,650	2.4	35,100	0.8	30	1.3	2,590	1.3	91,180	4.8
300.00–349.90	1,840	1.0	88,750	1.9	10	0.4	2,090	1.0	58,940	3.1
350.00–399.90	2,140	1.1	42,170	0.9	30	1.3	1,620	0.8	40,440	2.1
400.00–449.90	2,260	1.2	53,320	1.2	30	1.3	2,150	1.0	41,800	2.2
450.00–499.90	4,590	2.4	86,790	1.9	40	1.7	3,940	1.9	76,580	4.0
500.00–549.90	6,670	3.5	100,500	2.2	120	5.1	5,670	2.8	98,550	5.2
550.00–599.90	7,840	4.1	108,110	2.4	120	5.1	5,800	2.8	105,790	5.6
600.00–649.90	8,220	4.3	115,360	2.5	40	1.7	7,260	3.5	103,190	5.4
650.00–699.90	7,810	4.0	123,650	2.7	140	6.0	7,580	3.7	103,490	5.4
700.00–749.90	8,410	4.4	134,400	2.9	140	6.0	8,300	4.0	97,290	5.1
750.00–799.90	8,550	4.4	162,430	3.6	140	6.0	8,870	4.3	98,650	5.2
800.00–849.90	9,380	4.9	179,050	3.9	130	5.5	9,110	4.4	96,140	5.0
850.00–899.90	9,810	5.1	283,900	6.2	150	6.4	9,890	4.8	102,120	5.4
900.00–949.90	9,470	4.9	245,980	5.4	140	6.0	10,440	5.1	88,110	4.6
950.00–999.90	8,510	4.4	268,090	5.9	80	3.4	10,900	5.3	77,970	4.1
1,000.00–1,049.90	8,680	4.5	310,230	6.8	110	4.7	11,570	5.6	74,570	3.9
1,050.00–1,099.90	7,950	4.1	265,340	5.8	40	1.7	10,780	5.2	64,880	3.4
1,100.00–1,149.90	7,840	4.1	284,780	6.2	40	1.7	10,210	5.0	61,980	3.3
1,150.00–1,199.90	7,060	3.7	309,000	6.8	150	6.4	10,840	5.3	55,180	2.9
1,200.00–1,249.90	6,820	3.5	307,160	6.7	90	3.8	9,320	4.5	51,000	2.7
1,250.00–1,299.90	7,350	3.8	281,980	6.2	130	5.5	11,160	5.4	50,990	2.7
1,300.00–1,349.90	7,500	3.9	288,590	6.3	140	6.0	11,760	5.7	51,870	2.7
1,350.00–1,399.90	6,440	3.3	163,610	3.6	80	3.4	9,750	4.7	41,100	2.2
1,400.00–1,449.90	5,870	3.0	106,440	2.3	50	2.1	7,520	3.7	35,630	1.9
1,450.00–1,499.90	5,520	2.9	65,120	1.4	20	0.9	5,690	2.8	30,760	1.6
1,500.00 or more	22,090	11.4	153,810	3.4	160	6.8	11,060	5.4	106,850	5.6

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F8—Number of widow(er)s and total monthly benefits, by type of benefit, December 1950–2002

Year	Total		Nondisabled—				Disabled widow(er)s	
	Number	Total monthly benefits (thousands of dollars)	Widows		Widowers		Number	Total monthly benefits (thousands of dollars)
			Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)		
1950	314,189	11,481	314,126	11,479	63	2	...	...
1951	384,265	13,849	384,011	13,841	254	8	...	...
1952	454,563	18,482	454,064	18,466	499	17	...	...
1953	540,653	22,096	539,854	22,069	799	27	...	...
1954	638,091	29,526	637,012	29,483	1,079	42	...	...
1955	701,360	34,152	700,294	34,103	1,066	50	...	...
1956	913,069	45,780	911,841	45,722	1,228	58	...	...
1957	1,095,137	55,944	1,093,645	55,872	1,492	71	...	...
1958	1,232,583	63,977	1,230,953	63,897	1,630	80	...	...
1959	1,393,587	79,047	1,391,686	78,946	1,901	101	...	...
1960	1,543,843	89,054	1,541,790	88,943	2,053	110	...	...
1961	1,697,308	110,179	1,694,977	110,035	2,331	144	...	...
1962	1,859,191	122,475	1,856,658	122,318	2,533	157	...	...
1963	2,010,769	134,403	2,008,102	134,234	2,667	168	...	...
1964	2,158,912	146,476	2,156,143	146,300	2,769	176	...	...
1965	2,371,433	174,883	2,368,629	174,688	2,804	195	...	...
1966	2,602,015	192,821	2,599,178	192,620	2,837	200	...	...
1967	2,769,618	207,692	2,766,736	207,487	2,882	205	...	...
1968	2,937,890	253,924	2,913,376	252,123	2,951	242	21,563	1,558
1969	3,091,710	269,799	3,049,177	266,741	3,064	255	39,469	2,803
1970	3,227,160	328,245	3,174,846	323,912	3,033	293	49,281	4,041
1971	3,366,304	380,963	3,306,528	375,528	3,033	322	56,743	5,113
1972	3,509,777	483,161	3,442,595	475,746	3,015	386	64,167	7,029
1973	3,656,353	571,654	3,574,458	562,441	3,126	459	78,769	8,754
1974	3,769,559	663,569	3,674,376	651,471	3,055	502	92,128	11,596
1975	3,888,705	747,902	3,776,090	732,269	3,104	553	109,511	15,080
1976	3,994,380	827,325	3,871,894	809,181	3,059	587	119,427	17,557
1977	4,119,487	914,738	3,980,324	892,764	11,887	2,105	127,276	19,869
1978	4,211,710	1,005,929	4,066,673	981,615	15,287	2,845	129,751	21,469
1979	4,321,496	1,153,272	4,173,745	1,126,089	17,918	3,745	129,833	23,438
1980	4,410,515	1,358,836	4,262,607	1,327,814	20,328	4,866	127,580	26,156
1981	4,507,941	1,560,103	4,363,708	1,526,511	22,643	6,042	121,590	27,550
1982	4,594,961	1,724,392	4,453,575	1,689,073	25,014	7,144	116,372	28,175
1983	4,693,791	1,844,798	4,554,414	1,808,647	27,786	8,216	111,591	27,935
1984	4,779,190	1,973,203	4,640,805	1,930,807	29,234	8,970	109,151	33,426
1985	4,862,805	2,094,003	4,725,618	2,050,678	30,182	9,592	107,005	33,734
1986	4,928,019	2,175,345	4,789,969	2,131,049	31,076	10,092	106,974	34,204
1987	4,983,846	2,318,747	4,846,135	2,272,557	31,429	10,703	106,282	35,487
1988	5,028,822	2,461,945	4,892,829	2,414,239	32,870	11,816	103,123	35,892
1989	5,070,873	2,629,728	4,935,911	2,579,726	33,332	12,731	101,630	37,270
1990	5,111,482	2,827,012	4,976,420	2,773,818	34,073	13,916	100,989	39,278
1991	5,158,383	2,989,385	5,008,789	2,927,768	35,105	15,024	114,489	46,593
1992	5,205,375	3,138,250	5,037,583	3,066,568	36,468	16,178	131,324	55,504
1993	5,224,279	3,264,849	5,039,874	3,183,768	37,390	17,255	147,015	63,826
1994	5,232,379	3,394,982	5,034,219	3,305,229	37,484	18,043	160,676	71,710
1995	5,225,519	3,514,262	5,014,991	3,416,203	37,504	18,759	173,024	79,300
1996	5,209,812	3,639,632	4,990,079	3,534,268	37,822	19,692	181,911	85,671
1997	5,053,442	3,646,898	4,829,456	3,537,348	36,048	19,268	187,938	90,282
1998	4,989,855	3,685,349	4,759,829	3,571,047	35,845	19,683	194,181	94,619
1999	4,943,915	3,774,601	4,709,091	3,654,598	36,029	20,624	198,795	99,380
2000	4,901,437	3,912,527	4,663,228	3,785,532	36,782	22,322	201,427	104,674
2001	4,828,327	3,997,687	4,586,677	3,864,251	37,407	23,822	204,243	109,615
2002	4,770,638	4,043,051	4,524,020	3,903,384	39,260	26,020	207,358	113,648

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F9—Number, percentage, and average monthly benefit, by year of entitlement as nondisabled widow(er), December 2002

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	4,563,660	100.0	...	861.40
2000–2002	834,600	18.3	...	924.50
1995–1999	1,156,700	25.3	...	908.90
1990–1994	925,260	20.3	...	885.40
1985–1989	747,730	16.4	...	834.70
1980–1984	507,570	11.1	...	777.30
1975–1979	245,320	5.4	...	708.60
1970–1974	109,610	2.4	...	660.90
1965–1969	34,190	0.7	...	649.60
Before 1965	2,680	0.1	...	861.40
2002	271,300	5.9	5.9	931.10
2001	286,970	6.3	12.2	920.20
2000	276,330	6.1	18.3	922.30
1999	259,980	5.7	24.0	909.80
1998	246,780	5.4	29.4	911.30
1997	224,460	4.9	34.3	910.80
1996	216,340	4.7	39.1	908.50
1995	209,140	4.6	43.6	903.60
1994	201,330	4.4	48.0	901.70
1993	193,150	4.2	52.3	893.80
1992	182,610	4.0	56.3	890.00
1991	176,030	3.9	60.1	874.10
1990	172,140	3.8	63.9	863.70
1989	162,790	3.6	67.5	855.20
1988	156,480	3.4	70.9	845.50
1987	149,550	3.3	74.2	836.70
1986	144,520	3.2	77.3	819.50
1985	134,390	2.9	80.3	811.20
1984	124,720	2.7	83.0	798.50
1983	114,290	2.5	85.5	782.60
1982	99,740	2.2	87.7	778.40
1981	92,040	2.0	89.7	762.00
1980	76,780	1.7	91.4	751.90
1979	66,980	1.5	92.9	735.60
1978	55,780	1.2	94.1	722.70
1977	42,890	0.9	95.0	705.70
1976	43,100	0.9	96.0	678.60
1975	36,570	0.8	96.8	676.50
1974	30,850	0.7	97.5	672.90
1973	26,120	0.6	98.0	662.80
1972	21,090	0.5	98.5	654.60
1971	17,640	0.4	98.9	649.20
1970	13,910	0.3	99.2	655.00
1969	10,130	0.2	99.4	665.50
1968	8,580	0.2	99.6	645.80
1967	6,220	0.1	99.7	643.50
1966	4,440	0.1	99.8	641.20
1965	4,820	0.1	99.9	638.60

a. Represents those entitled in specified year or later.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2002

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	205,870	100.0	...	546.20
2000–2002	60,130	29.2	...	552.70
1996–1999	85,770	41.7	...	541.10
1991–1995	53,860	26.2	...	545.30
1988–1990	6,110	3.0	...	564.30
2002	14,920	7.2	7.2	547.00
2001	22,130	10.7	18.0	557.90
2000	23,080	11.2	29.2	551.40
1999	24,490	11.9	41.1	556.50
1998	22,210	10.8	51.9	538.90
1997	21,090	10.2	62.1	532.60
1996	17,980	8.7	70.9	532.60
1995	14,310	7.0	77.8	539.20
1994	13,110	6.4	84.2	545.20
1993	10,100	4.9	89.1	537.50
1992	8,070	3.9	93.0	556.90
1991	8,270	4.0	97.0	554.10
1990	2,830	1.4	98.4	587.60
1989	2,190	1.1	99.5	550.60
1988	1,090	0.5	100.0	531.20

a. Represents those entitled in specified year or later.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F11—Percentage distribution of nondisabled widows, by monthly benefit and age, December 2002

Monthly benefit (dollars)	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Total									
Number	4,523,860	126,160	307,950	654,870	733,860	888,330	848,530	566,230	397,930
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 300.00	2.9	3.3	4.1	2.9	3.3	3.3	2.8	2.5	0.9
300.00–349.90	1.9	1.2	1.2	1.3	1.4	1.7	2.0	2.4	4.7
350.00–399.90	2.0	2.0	1.9	1.9	2.0	2.1	2.1	2.1	1.9
400.00–449.90	2.5	2.8	2.6	2.3	2.4	2.5	2.3	2.6	2.8
450.00–499.90	2.9	2.9	2.9	2.7	2.7	2.7	2.8	3.0	3.6
500.00–549.90	3.2	3.5	3.3	2.9	3.0	3.1	3.2	3.5	4.0
550.00–599.90	3.7	3.7	3.5	3.4	3.4	3.6	3.8	4.0	4.2
600.00–649.90	4.6	4.4	4.1	4.0	4.1	4.7	4.9	5.5	4.8
650.00–699.90	5.1	4.5	4.7	4.7	4.7	5.0	5.3	5.8	6.3
700.00–749.90	6.0	5.1	5.6	5.3	5.3	6.0	6.3	6.3	7.4
750.00–799.90	6.2	5.6	6.1	5.9	5.9	6.3	5.8	6.0	8.5
800.00–849.90	6.8	6.0	6.5	6.5	6.8	7.1	6.4	6.3	8.2
850.00–899.90	7.4	7.1	7.0	7.1	7.9	8.1	6.8	6.5	8.5
900.00–949.90	7.6	7.8	8.1	9.3	9.1	7.4	6.8	5.8	6.4
950.00–999.90	7.2	7.9	8.5	8.9	7.3	7.1	6.9	5.5	5.8
1,000.00–1,049.90	6.1	7.0	8.1	6.8	6.0	6.1	5.7	5.4	5.4
1,050.00–1,099.90	5.1	7.1	6.7	5.6	5.9	5.0	4.7	4.3	3.5
1,100.00–1,149.90	4.0	6.2	5.3	4.5	4.4	3.8	3.6	3.4	2.5
1,150.00–1,199.90	3.1	5.4	3.7	3.4	3.2	3.2	3.1	2.8	1.6
1,200.00–1,249.90	2.6	3.8	2.4	2.5	2.8	3.0	2.8	2.3	1.3
1,250.00–1,299.90	2.1	2.0	1.4	2.3	2.5	2.1	2.2	2.1	1.1
1,300.00–1,349.90	1.8	0.4	1.0	2.0	2.0	1.8	2.2	2.3	1.1
1,350.00–1,399.90	1.2	0.1	0.5	1.4	1.1	1.0	1.3	1.9	0.9
1,400.00–1,449.90	0.9	0.1	0.3	0.9	0.7	0.7	1.2	1.5	0.7
1,450.00–1,499.90	0.6	0.0	0.1	0.5	0.4	0.5	1.0	1.1	0.6
1,500.00 or more	2.5	0.1	0.3	1.0	1.5	2.2	3.9	5.0	3.3
Average benefit (dollars)	863.10	845.20	835.70	867.30	863.60	856.80	881.30	885.50	825.10

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F12—Number of widowed and surviving divorced mothers and fathers and total monthly benefits, by type of benefit, December 1950–2002, selected years

Year	Total		Widowed						Surviving divorced	
			Subtotal		With at least 1 child under age 16 ^a		Entitled solely because of at least 1 disabled child ^b			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1950	169,438	5,801	169,426	5,800	169,426	5,800	...	...	12	c
1955	291,916	13,403	291,656	13,389	291,656	13,389	...	...	260	14
1960	401,358	23,795	400,976	23,768	394,560	23,383	6,416	385	382	27
1961	428,138	25,425	427,699	25,395	420,258	24,938	7,441	457	439	30
1962	451,984	26,838	451,520	26,805	443,182	26,290	8,338	515	464	33
1963	461,675	27,438	461,211	27,405	452,106	26,830	9,105	575	464	32
1964	470,597	27,954	470,100	27,290	460,348	27,295	9,752	625	497	34
1965	471,816	30,882	471,286	30,842	461,011	30,132	10,275	710	530	40
1966	487,755	31,983	486,958	31,927	476,275	31,188	10,683	739	797	56
1967	496,307	32,686	495,308	32,616	483,808	31,791	11,500	825	999	71
1968	504,916	37,833	503,774	37,743	492,674	36,849	11,100	894	1,142	90
1969	511,639	38,406	510,355	38,305	499,324	37,402	11,031	902	1,284	101
1970	523,136	45,258	521,698	45,127	510,215	44,039	11,483	1,089	1,438	131
1971	535,126	51,163	533,560	51,055	520,301	49,603	13,259	1,402	1,566	158
1972	540,965	62,457	539,153	62,237	526,548	60,612	12,605	1,625	1,812	220
1973	571,907	67,578	565,327	66,823	551,509	64,985	13,818	1,838	6,580	754
1974	573,506	76,980	562,801	75,605	544,335	72,914	18,466	2,692	10,705	1,374
1975	581,845	85,676	565,941	83,435	544,886	80,068	21,075	3,366	15,904	2,241
1976	578,727	92,466	558,933	89,400	537,002	85,637	21,931	3,764	19,794	3,065
1977	583,195	101,345	558,886	97,227	536,481	93,091	22,405	4,136	24,309	4,117
1978	576,343	109,714	548,463	104,506	525,879	100,028	22,584	4,478	27,880	5,209
1979	573,750	121,957	541,480	115,284	518,564	110,235	22,916	5,049	32,270	6,674
1980	562,316	138,426	525,661	129,754	502,639	123,885	23,022	5,869	36,655	8,671
1981	547,593	151,509	507,777	140,990	484,427	134,299	23,350	6,691	39,816	10,518
1982	514,772	155,876	474,003	144,207	451,159	137,068	22,844	7,139	40,769	11,669
1983	400,298	123,559	363,946	112,979	339,367	104,956	24,579	8,022	36,352	10,581
1984	382,411	122,957	346,319	112,002	318,076	102,391	28,243	9,612	36,092	10,995
1985	371,659	123,557	335,085	112,117	306,004	101,812	29,081	10,304	36,574	11,440
1986	350,546	118,602	315,572	107,470	286,290	96,887	29,282	10,583	34,974	11,132
1987	340,940	115,967	307,581	104,888	278,582	93,871	28,999	11,017	33,359	11,079
1988	317,761	116,902	285,265	105,596	256,463	94,096	28,802	11,500	32,496	11,306
1989	312,079	120,970	280,006	109,184	251,646	97,170	28,360	12,014	32,073	11,786
1990	303,923	124,340	272,526	112,103	244,965	99,683	27,561	12,420	31,397	12,237
1991	300,661	127,510	269,679	114,962	242,379	102,085	27,300	12,877	30,982	12,548
1992	294,716	128,748	263,630	115,884	236,990	102,840	26,640	13,045	30,546	12,864
1993	289,350	129,752	259,320	116,771	232,794	103,365	26,526	13,407	30,030	12,981
1994	283,072	131,463	253,928	118,399	227,709	104,658	26,219	13,741	29,144	13,064
1995	275,020	131,430	247,113	118,550	221,494	104,664	25,619	13,886	27,907	12,881
1996	242,135	124,678	218,171	112,627	193,664	98,799	24,507	13,828	23,964	12,051
1997	230,222	122,488	207,658	110,774	184,184	97,120	23,474	13,654	22,564	11,714
1998	220,610	120,247	199,447	109,001	176,660	95,491	22,787	13,510	21,163	11,246
1999	212,401	120,157	192,544	109,195	170,572	95,732	21,972	13,463	19,857	10,962
2000	203,052	120,812	184,397	109,941	164,420	97,063	19,977	12,878	18,655	10,871
2001	197,375	122,526	179,413	111,539	160,186	98,672	19,227	12,867	17,962	10,987
2002	194,117	124,267	176,447	113,097	158,020	100,413	18,427	12,685	17,670	11,170

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. Less than \$500.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F13—Number and average monthly benefit for nondisabled widows aged 65 or older, by age, reduction status, and limitation of benefit, December 2002

Age	Number	Average monthly benefit (dollars)	Benefits not reduced due to early retirement of widow						Benefits reduced due to early retirement of widow	
			Number	Average monthly benefit (dollars)	Benefits not limited due to early retirement of deceased spouse		Benefits limited due to early retirement of deceased spouse		Number	Average monthly benefit (dollars)
					Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)		
All nondisabled widows aged 65 or older	4,089,750	865.70	1,902,090	963.70	953,410	1,072.60	948,680	854.30	^a 2,187,660	780.40
65–69	654,870	867.30	111,050	1,006.00	78,070	1,049.00	32,980	904.20	543,820	839.00
65	124,080	869.20	11,250	1,031.50	9,470	1,051.10	1,780	927.40	112,830	853.10
66	128,960	867.80	16,140	1,013.50	12,040	1,043.30	4,100	925.90	112,820	847.00
67	133,690	865.50	22,710	1,007.50	16,090	1,049.40	6,620	905.80	110,980	836.50
68	135,690	870.90	29,240	1,013.60	20,380	1,056.70	8,860	914.20	106,450	831.70
69	132,450	863.20	31,710	985.10	20,090	1,043.30	11,620	884.60	100,740	824.80
70–74	733,860	863.60	244,210	972.30	131,490	1,042.40	112,720	890.50	489,650	809.40
70	133,820	860.30	36,860	973.20	21,510	1,028.40	15,350	895.70	96,960	817.40
71	137,310	865.10	41,710	978.20	23,540	1,046.10	18,170	890.20	95,600	815.70
72	150,190	864.70	49,920	971.00	26,320	1,046.80	23,600	886.40	100,270	811.80
73	151,420	866.70	53,820	978.40	28,710	1,047.30	25,110	899.60	97,600	805.10
74	161,120	861.20	61,900	963.60	31,410	1,041.20	30,490	883.70	99,220	797.30
75–79	888,330	856.80	404,090	957.60	194,530	1,056.70	209,560	865.70	484,240	772.60
75	171,490	859.10	70,220	958.80	34,850	1,042.70	35,370	876.20	101,270	789.90
76	176,190	857.90	75,980	962.30	37,640	1,053.10	38,340	873.10	100,210	778.80
77	175,770	855.80	79,780	954.70	37,660	1,053.50	42,120	866.30	95,990	773.50
78	184,780	851.80	88,730	949.70	41,780	1,054.40	46,950	856.60	96,050	761.40
79	180,100	859.60	89,380	963.30	42,600	1,076.60	46,780	860.10	90,720	757.40
80–84	848,530	881.30	479,320	986.30	222,050	1,119.60	257,270	871.20	369,210	745.00
80	183,430	865.40	95,720	970.10	44,850	1,088.10	50,870	866.00	87,710	751.20
81	187,550	872.20	101,850	974.60	46,960	1,100.80	54,890	866.60	85,700	750.60
82	177,290	884.00	100,290	987.90	46,770	1,122.10	53,520	870.70	77,000	748.60
83	154,750	888.40	91,160	995.90	42,300	1,132.90	48,860	877.20	63,590	734.30
84	145,510	902.20	90,300	1,005.20	41,170	1,159.00	49,130	876.30	55,210	733.80
85–89	566,230	885.50	377,180	982.40	175,010	1,133.70	202,170	851.30	189,050	692.30
85	130,030	903.10	82,840	1,006.60	38,820	1,150.30	44,020	879.80	47,190	721.60
86	123,980	889.80	81,490	992.40	37,010	1,139.30	44,480	870.10	42,490	693.00
87	114,550	885.20	77,330	982.60	35,870	1,139.90	41,460	846.50	37,220	682.70
88	104,210	876.40	70,970	970.60	33,290	1,127.00	37,680	832.50	33,240	675.20
89	93,460	865.90	64,550	951.30	30,020	1,105.60	34,530	817.10	28,910	675.40
90 or older	397,930	825.10	286,240	886.10	152,260	992.10	133,980	765.70	111,690	668.60

a. Includes 154,580 widows with benefits also limited due to early retirement of spouse.

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

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G1—Percentage distribution of persons receiving both a retired-worker and a secondary benefit without and with reduction for early retirement, by sex and primary insurance amount, December 2002

Primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All dually entitled retired workers	6,134,800	100.0	1,091,130	100.0	5,043,670	100.0
Less than 250.00	670,820	10.9	100,740	9.2	570,080	11.3
250.00–299.90	374,140	6.1	54,070	5.0	320,070	6.3
300.00–349.90	567,180	9.2	90,920	8.3	476,260	9.4
350.00–399.90	371,850	6.1	60,200	5.5	311,650	6.2
400.00–449.90	414,720	6.8	68,570	6.3	346,150	6.9
450.00–499.90	646,980	10.5	114,030	10.5	532,950	10.6
500.00–549.90	646,310	10.5	115,470	10.6	530,840	10.5
550.00–599.90	545,300	8.9	100,450	9.2	444,850	8.8
600.00–649.90	441,020	7.2	83,870	7.7	357,150	7.1
650.00–699.90	323,030	5.3	63,220	5.8	259,810	5.2
700.00–749.90	239,690	3.9	48,780	4.5	190,910	3.8
750.00–799.90	192,620	3.1	40,690	3.7	151,930	3.0
800.00–849.90	150,550	2.5	31,990	2.9	118,560	2.4
850.00–899.90	135,840	2.2	29,080	2.7	106,760	2.1
900.00–949.90	106,160	1.7	22,210	2.0	83,950	1.7
950.00–999.90	83,720	1.4	17,080	1.6	66,640	1.3
1,000.00–1,049.90	67,800	1.1	13,790	1.3	54,010	1.1
1,050.00–1,099.90	48,220	0.8	9,290	0.9	38,930	0.8
1,100.00 or more	108,850	1.8	26,680	2.4	82,170	1.6
Men	118,120	100.0	30,650	100.0	87,470	100.0
Less than 250.00	8,500	7.2	3,940	12.9	4,560	5.2
250.00–299.90	3,850	3.3	1,630	5.3	2,220	2.5
300.00–349.90	6,470	5.5	2,350	7.7	4,120	4.7
350.00–399.90	3,840	3.3	1,340	4.4	2,500	2.9
400.00–449.90	4,390	3.7	1,690	5.5	2,700	3.1
450.00–499.90	6,950	5.9	2,390	7.8	4,560	5.2
500.00–549.90	7,550	6.4	2,630	8.6	4,920	5.6
550.00–599.90	6,900	5.8	2,100	6.9	4,800	5.5
600.00–649.90	6,390	5.4	1,780	5.8	4,610	5.3
650.00–699.90	5,590	4.7	1,190	3.9	4,400	5.0
700.00–749.90	5,420	4.6	960	3.1	4,460	5.1
750.00–799.90	5,400	4.6	1,040	3.4	4,360	5.0
800.00–849.90	4,650	3.9	800	2.6	3,850	4.4
850.00–899.90	4,630	3.9	810	2.6	3,820	4.4
900.00–949.90	4,590	3.9	860	2.8	3,730	4.3
950.00–999.90	5,330	4.5	830	2.7	4,500	5.1
1,000.00–1,049.90	5,150	4.4	760	2.5	4,390	5.0
1,050.00–1,099.90	4,770	4.0	670	2.2	4,100	4.7
1,100.00 or more	17,750	15.0	2,880	9.4	14,870	17.0
Women	6,016,680	100.0	1,060,480	100.0	4,956,200	100.0
Less than 250.00	662,320	11.0	96,800	9.1	565,520	11.4
250.00–299.90	370,290	6.2	52,440	4.9	317,850	6.4
300.00–349.90	560,710	9.3	88,570	8.4	472,140	9.5
350.00–399.90	368,010	6.1	58,860	5.6	309,150	6.2
400.00–449.90	410,330	6.8	66,880	6.3	343,450	6.9
450.00–499.90	640,030	10.6	111,640	10.5	528,390	10.7
500.00–549.90	638,760	10.6	112,840	10.6	525,920	10.6
550.00–599.90	538,400	8.9	98,350	9.3	440,050	8.9
600.00–649.90	434,630	7.2	82,090	7.7	352,540	7.1
650.00–699.90	317,440	5.3	62,030	5.8	255,410	5.2
700.00–749.90	234,270	3.9	47,820	4.5	186,450	3.8
750.00–799.90	187,220	3.1	39,650	3.7	147,570	3.0
800.00–849.90	145,900	2.4	31,190	2.9	114,710	2.3
850.00–899.90	131,210	2.2	28,270	2.7	102,940	2.1
900.00–949.90	101,570	1.7	21,350	2.0	80,220	1.6
950.00–999.90	78,390	1.3	16,250	1.5	62,140	1.3
1,000.00–1,049.90	62,650	1.0	13,030	1.2	49,620	1.0
1,050.00–1,099.90	43,450	0.7	8,620	0.8	34,830	0.7
1,100.00 or more	91,100	1.5	23,800	2.2	67,300	1.4

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

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2002

Year	Total	Women						Men				
		Subtotal		Wife's benefit		Widow's benefit		Parent's benefit	Subtotal	Husband's benefit	Widower's benefit	Parent's benefit
		Number	Percentage of all women retired workers	Number	Percentage of all women entitled to wife's benefit because of age	Number	Percentage of all women entitled to widow's benefit					
1952	36,132	35,402	6.0	14,131	6.0	20,850	4.4	421	730	258	83	389
1953	54,798	53,631	6.8	23,355	2.7	29,668	5.2	608	1,167	529	148	490
1954	79,689	77,978	8.0	34,225	3.4	42,899	6.3	854	1,711	827	257	627
1955	108,551	106,320	8.7	49,637	4.2	55,664	7.4	1,019	2,231	1,224	342	665
1956	143,284	140,603	9.1	68,766	4.8	70,601	7.2	1,236	2,681	1,542	426	713
1957	194,501	190,951	9.6	102,522	5.6	86,951	7.4	1,478	3,550	2,152	578	820
1958	229,599	225,790	9.8	124,504	6.1	99,669	7.5	1,617	3,809	2,421	634	754
1959	268,900	264,434	10.2	141,831	6.4	120,458	8.0	2,145	4,466	2,794	772	900
1960	307,736	302,646	10.6	159,032	6.8	141,218	8.4	2,396	5,090	3,197	911	982
1961	335,243	330,727	10.5	159,587	6.6	169,264	9.1	1,876	4,516	2,652	1,090	774
1962	427,085	421,535	12.1	204,445	7.9	214,371	10.4	2,719	5,550	3,229	1,330	991
1963	502,839	496,639	13.2	138,081	8.9	255,408	11.3	3,150	6,200	3,597	1,543	1,060
1964	577,954	571,144	14.2	269,657	9.9	297,929	12.1	3,558	6,810	3,940	1,752	1,118
1965	618,730	611,610	14.3	^a 282,940	^a 10.3	^a 324,930	^a 12.3	^a 3,740	^a 7,120	^a 4,110	^a 1,910	^a 1,100
1966	706,860	699,080	15.1	^a 315,550	^a 11.2	^a 379,440	^a 13.2	^a 4,090	^a 7,780	^a 4,470	^a 2,260	^a 1,050
1967	770,190	760,950	15.7	^a 334,200	^a 11.8	^a 422,480	^a 13.8	^a 4,270	^a 9,240	^a 5,190	^a 3,070	^a 980
1968	842,560	831,760	16.3	^a 354,750	^a 12.4	^a 472,590	^a 14.5	^a 4,420	^a 10,800	^a 5,810	^a 4,110	^a 880
1969	920,250	909,720	17.0	^a 376,520	^a 13.0	^a 528,660	^a 15.3	^a 4,540	^a 10,530	^a 5,620	^a 4,160	^a 750
1970	977,340	966,780	17.1	^a 388,210	^a 13.3	^a 573,950	^a 15.9	^a 4,620	^a 10,560	^a 5,530	^a 4,400	^a 630
1971	1,069,940	1,060,120	17.7	^a 411,710	^a 13.8	^a 643,730	^a 16.9	^a 4,680	^a 9,820	^a 5,130	^a 4,170	^a 520
1972	1,183,369	1,170,286	18.5	^a 477,333	^a 15.5	^a 688,087	^a 17.3	^a 4,866	^a 13,083	^a 6,797	^a 5,442	^a 844
1973	1,377,080	1,361,360	20.2	562,111	17.7	794,001	22.2	5,248	15,710	7,966	6,986	758
1974	1,534,583	1,516,326	21.3	^a 554,844	^a 17.1	^a 956,662	^a 21.4	^a 4,820	^a 18,257	^a 6,592	^a 11,080	^a 585
1975	1,679,825	1,660,451	22.4	616,669	18.4	1,038,992	22.3	4,790	19,374	9,920	8,690	764
1976	1,827,928	1,812,008	23.4	^a 669,792	^a 19.5	^a 1,137,251	^a 23.4	^a 4,965	^a 15,920	^a 7,497	^a 7,779	^a 644
1977	2,026,534	1,991,915	24.6	762,250	21.4	1,225,344	24.3	4,321	34,619	14,557	19,544	518
1978	2,208,490	2,163,011	25.7	836,004	22.8	1,322,897	25.3	4,110	45,479	17,832	27,192	455
1979	2,435,848	2,380,260	27.1	917,747	24.4	1,458,611	26.6	3,902	55,588	20,179	35,004	405
1980	2,660,037	2,594,467	28.5	1,015,672	26.2	1,575,085	27.8	3,710	65,570	22,597	42,580	393
1981	^b	^b	^b	^b	^b	^b	^b	^b	^b	^b	^b	^b
1982	3,109,239	3,031,518	31.1	1,239,736	29.8	1,788,556	29.5	3,226	77,721	24,787	52,604	330
1983	3,355,148	3,267,890	32.5	1,369,396	31.6	1,895,579	30.3	2,915	87,258	27,449	59,518	291
1984	3,568,639	3,479,191	33.7	1,479,756	33.2	1,996,805	31.0	2,630	89,448	27,189	62,011	248
1985	3,801,183	3,708,856	34.9	1,594,226	34.7	2,112,245	31.8	2,385	92,327	26,912	65,202	213
1986	4,032,760	3,934,811	36.1	1,719,449	36.2	2,213,225	32.5	2,137	97,949	27,693	70,064	192
1987	4,214,214	4,116,759	36.9	1,804,946	37.3	2,309,899	33.1	1,914	97,455	26,928	70,359	168
1988	4,403,012	4,302,714	37.9	1,892,763	38.5	2,408,232	33.8	1,719	100,298	27,210	72,942	146
1989	4,590,475	4,487,314	38.7	1,982,095	39.5	2,503,679	34.4	1,540	103,161	27,484	75,543	134
1990	4,783,122	4,677,680	39.5	2,076,737	40.5	2,599,560	35.1	1,383	105,442	27,463	77,862	117
1991	4,959,610	4,852,656	40.2	2,158,022	41.5	2,693,388	35.7	1,246	106,954	27,195	79,654	105
1992	5,140,627	5,032,206	41.0	2,242,029	42.3	2,789,029	36.3	1,148	108,421	26,849	81,475	97
1993	5,285,960	5,176,650	41.6	2,312,000	43.1	2,863,510	37.0	1,140	109,310	26,330	82,920	60
1994	5,419,910	5,308,300	42.1	2,359,470	43.9	2,947,820	37.6	1,010	111,610	26,920	84,660	30
1995	5,533,200	5,420,320	42.5	2,397,710	44.5	3,021,720	38.0	890	112,880	26,660	86,190	30
1996	5,629,780	5,517,510	42.8	2,429,520	45.3	3,087,130	38.3	860	112,270	25,750	86,480	40
1997	5,729,620	5,617,590	42.7	2,461,060	46.0	3,155,760	39.6	770	112,030	24,540	87,460	30
1998	5,810,410	5,699,080	42.8	2,482,950	46.7	3,215,380	40.4	750	111,330	23,740	87,560	30
1999	5,883,950	5,772,260	42.9	2,499,200	47.3	3,272,420	41.0	640	111,690	23,560	88,100	30
2000	6,009,800	5,896,390	42.9	2,568,470	48.2	3,327,360	41.6	560	113,410	24,660	88,720	30
2001	6,076,350	5,961,580	42.9	2,583,730	48.9	3,377,330	42.4	520	114,770	25,570	89,170	30
2002	6,134,800	6,016,680	42.7	2,591,820	49.5	3,424,390	43.0	470	118,120	27,090	91,000	30

a. Distributions by type of secondary benefit are estimated.

b. Data not available.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1993–2002 are based on a 10 percent sample. All other years are 100 percent data.

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G3—Number receiving both a retired-worker and a secondary benefit and average monthly benefit, by type of secondary benefit, December 2002

Type of secondary benefit	Number	Average monthly benefit (dollars)		
		Combined benefit	Retired-worker benefit	Reduced secondary benefit
All dually entitled retired workers	6,134,800	806.90	446.30	360.60
Wives and husbands	2,618,910	538.00	357.50	180.50
Wives of—	2,591,820	538.80	357.60	181.20
Retired workers	2,561,340	539.10	357.70	181.40
Disabled workers	30,480	511.70	347.90	163.80
Husbands of—	27,090	468.20	346.20	122.00
Retired workers	26,120	469.00	346.90	122.10
Disabled workers	970	445.60	328.20	117.40
Widow(er)s	3,515,390	1,007.20	512.50	494.70
Widows	3,424,390	1,009.10	507.40	501.70
Widowers	91,000	933.90	704.00	229.90
Parents	500	904.90	444.80	460.10

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

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

Table 5.G4—Number receiving both a retired-worker and a secondary benefit, average monthly benefit, and retired-worker benefit as a percentage of combined benefit, December 2002

Total combined monthly benefit (dollars)	Number		Average combined monthly benefit (dollars)		Retired-worker benefit as a percentage of combined monthly benefit	
	Wives or husbands	Widow(er)s	Wives or husbands	Widow(er)s	Wives or husbands	Widow(er)s
All dually entitled retired workers	^a 2,618,910	^b 3,515,390	535.40	1,013.10	67	51
Less than 200.00	18,870	2,580	156.30	153.20	81	80
200.00–249.90	25,800	3,610	226.90	228.40	76	76
250.00–299.90	40,340	7,750	276.70	278.80	72	75
300.00–349.90	64,210	15,070	327.00	326.30	70	76
350.00–399.90	110,770	17,600	377.40	376.70	68	70
400.00–449.90	219,700	27,860	428.20	426.50	68	69
450.00–499.90	426,010	42,540	477.10	476.50	67	69
500.00–549.90	615,000	53,710	525.10	525.80	69	67
550.00–599.90	446,630	66,480	572.90	575.80	69	66
600.00–649.90	285,250	84,390	623.60	626.30	67	65
650.00–699.90	181,340	99,260	672.50	676.10	65	64
700.00–749.90	95,540	122,870	722.10	726.20	62	62
750.00–799.90	54,190	162,010	773.00	776.50	60	61
800.00–849.90	17,120	202,460	820.90	826.50	56	59
850.00–899.90	5,870	256,390	870.50	876.40	51	58
900.00–949.90	3,000	277,460	924.20	926.10	46	55
950.00–999.90	2,050	308,370	973.50	974.80	46	53
1,000.00–1,049.90	^c 7,220	301,440	^c 1,182.90	1,024.90	^c 42	52
1,050.00–1,099.90	...	279,350	...	1,074.90	...	50
1,100.00–1,149.90	...	225,380	...	1,124.20	...	49
1,150.00–1,199.90	...	189,540	...	1,174.70	...	47
1,200.00–1,249.90	...	166,710	...	1,224.90	...	46
1,250.00–1,299.90	...	139,830	...	1,274.90	...	44
1,300.00–1,349.90	...	124,230	...	1,323.80	...	43
1,350.00–1,399.90	...	81,650	...	1,374.30	...	42
1,400.00–1,449.90	...	60,560	...	1,423.60	...	41
1,450.00–1,499.90	...	44,440	...	1,473.80	...	40
1,500.00 or more	...	151,850	...	1,759.60	...	36

a. Includes 27,090 husbands.

b. Includes 91,000 widowers.

c. \$1,000 or more.

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

NOTE: ... = not applicable.

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G5—Percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2002

Total combined monthly benefit (dollars)	Number	Percentage distribution by dollar amount of retired-worker benefit												
		Total	Less than 200.00	200.00–249.90	250.00–299.90	300.00–349.90	350.00–399.90	400.00–449.90	450.00–499.90	500.00–549.90	550.00–599.90	600.00–649.90	650.00–699.90	700.00 or more
<i>Dually entitled wives and husbands</i>														
All	^a 2,618,910	100.0	15.1	10.7	10.5	9.6	12.8	14.6	11.8	7.8	3.9	2.0	0.8	0.5
Less than 200.00	18,870	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	25,800	100.0	66.4	33.5	...	...	...	...	...	...	...	...	...	...
250.00–299.90	40,340	100.0	46.6	29.4	24.0	...	...	...	...	...	...	...	...	...
300.00–349.90	64,210	100.0	35.0	23.6	24.4	17.0	...	...	...	...	...	...	...	...
350.00–399.90	110,770	100.0	27.0	19.5	19.9	17.8	15.7	...	...	...	...	...	...	...
400.00–449.90	219,700	100.0	21.7	15.0	14.5	13.4	20.4	14.9	...	...	...	...	...	...
450.00–499.90	426,010	100.0	17.7	12.4	11.6	11.1	17.2	19.7	10.3	...	...	...	...	...
500.00–549.90	615,000	100.0	11.6	9.3	9.9	9.7	15.2	19.2	16.8	8.4	...	...	...	...
550.00–599.90	446,630	100.0	8.4	7.5	8.3	8.3	11.8	16.9	17.3	15.3	6.2	...	...	...
600.00–649.90	285,250	100.0	8.9	6.9	7.4	7.4	9.0	13.3	15.1	14.2	12.5	5.2	...	...
650.00–699.90	181,340	100.0	8.4	7.0	6.6	6.7	8.0	10.8	12.8	13.0	11.3	11.2	4.2	...
700.00 or more	184,990	100.0	9.1	7.6	7.7	7.2	6.9	7.4	10.5	10.5	9.6	8.9	7.8	6.9
<i>Dually entitled widow(er)s</i>														
All	^b 3,515,390	100.0	6.2	5.3	8.2	7.0	8.4	8.9	8.5	8.0	7.0	6.3	5.5	20.6
Less than 200.00	2,580	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	3,610	100.0	64.8	35.2	...	...	...	...	...	...	...	...	...	...
250.00–299.90	7,750	100.0	38.5	28.6	32.9	...	...	...	...	...	...	...	...	...
300.00–349.90	15,070	100.0	22.4	16.9	39.2	21.4	...	...	...	...	...	...	...	...
350.00–399.90	17,600	100.0	20.5	16.0	27.8	22.8	12.9	...	...	...	...	...	...	...
400.00–449.90	27,860	100.0	16.8	11.5	21.1	19.3	18.8	12.4	...	...	...	...	...	...
450.00–499.90	42,540	100.0	12.8	8.7	17.3	15.9	17.6	17.3	10.4	...	...	...	...	...
500.00–549.90	53,710	100.0	10.5	7.7	14.2	13.6	14.7	15.9	14.4	9.0	...	...	...	...
550.00–599.90	66,480	100.0	8.5	7.1	11.8	11.7	12.5	14.1	14.5	13.5	6.2	...	...	...
600.00–649.90	84,390	100.0	7.9	6.1	10.3	9.7	11.0	12.5	13.6	12.7	10.8	5.5	...	...
650.00–699.90	99,260	100.0	6.3	5.7	9.1	8.9	10.6	11.4	12.3	11.7	10.6	8.9	4.6	...
700.00–749.90	122,870	100.0	5.8	5.1	8.9	8.0	9.4	10.3	11.4	11.1	10.5	8.8	7.0	3.6
750.00–799.90	162,010	100.0	5.0	4.5	8.2	7.6	8.3	10.2	10.0	10.3	9.2	9.1	8.0	9.4
800.00–849.90	202,460	100.0	4.6	4.7	8.3	7.2	8.3	8.9	9.1	9.5	8.9	8.6	7.4	14.5
850.00–899.90	256,390	100.0	4.5	4.4	7.8	6.7	8.0	8.7	8.3	8.9	8.5	7.7	7.2	19.3
900.00–949.90	277,460	100.0	5.3	4.8	7.5	6.5	8.3	8.3	8.3	8.3	7.7	7.2	6.8	21.1
950.00–999.90	308,370	100.0	6.1	5.1	7.4	6.3	8.1	8.5	8.1	8.0	7.0	6.8	6.0	22.4
1,000.00–1,049.90	301,440	100.0	6.1	5.0	7.4	6.0	8.1	8.3	7.9	7.4	6.8	6.4	6.0	24.8
1,050.00–1,099.90	279,350	100.0	6.0	4.9	7.1	5.8	8.0	8.5	8.1	7.6	6.9	6.2	5.8	25.1
1,100.00–1,149.90	225,380	100.0	5.3	4.8	7.0	5.8	7.8	8.2	8.0	7.5	6.6	6.2	5.7	27.1
1,150.00–1,199.90	189,540	100.0	5.7	5.0	6.5	5.7	7.6	8.4	7.5	7.5	6.2	5.7	5.7	28.6
1,200.00–1,249.90	166,710	100.0	6.1	5.4	6.5	5.3	7.4	7.8	7.5	7.0	6.3	5.6	5.6	29.7
1,250.00–1,299.90	139,830	100.0	5.9	5.0	6.6	5.6	7.5	7.9	7.7	7.1	6.2	5.9	5.3	29.2
1,300.00–1,349.90	124,230	100.0	5.3	5.2	7.3	6.0	6.9	7.8	7.8	6.7	5.8	5.5	4.9	30.7
1,350.00–1,399.90	81,650	100.0	5.3	4.9	6.9	6.6	7.0	7.6	7.3	6.7	5.9	5.6	5.1	31.2
1,400.00–1,449.90	60,560	100.0	5.0	5.3	7.6	5.8	7.5	7.2	7.7	7.1	6.0	5.2	5.0	30.6
1,450.00–1,499.90	44,440	100.0	4.8	5.5	7.5	6.4	7.5	7.5	7.2	6.2	5.8	5.2	4.7	31.7
1,500.00 or more	151,850	100.0	4.9	4.9	7.5	6.9	7.0	7.2	7.0	5.9	5.1	5.0	4.8	33.8

a. Includes 27,090 husbands.

b. Includes 91,000 widowers.

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

NOTE: ... = not applicable.

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2002, selected years

Year	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife ^a	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, ^b and—		Worker and spouse
	All	Men	Women			1 child	2 children	3 or more children	All	Men	Women	1 child	2 or more children	
<i>Number (thousands)</i>														
1945	416	338	78	181	95	86	48	24	...	...	...	...	...	...
1950	1,240	939	301	498	314	82	53	33	...	...	...	...	...	...
1955	3,266	2,054	1,212	1,124	700	126	86	80	...	...	...	...	...	...
1960	5,742	2,922	2,820	2,122	1,527	172	113	114	357	261	96	22	32	22
1965	8,386	4,137	4,249	2,400	2,332	182	135	153	714	481	232	54	109	30
1970	10,533	4,904	5,629	2,457	3,080	183	155	182	1,054	680	374	77	164	43
1975	13,520	6,134	7,385	2,618	3,606	221	182	176	1,750	1,080	671	137	250	66
1980	16,314	7,286	9,028	2,736	4,033	239	184	134	2,061	1,257	804	154	228	80
1985	19,132	8,601	10,531	2,861	4,606	158	131	74	2,039	1,267	772	84	140	76
1986	19,664	8,849	10,816	2,883	4,666	151	123	68	2,096	1,301	795	82	136	74
1987	20,137	9,064	11,074	2,893	4,709	141	115	62	2,154	1,338	816	79	132	74
1988	20,567	9,264	11,302	2,896	4,749	137	112	61	2,194	1,353	841	77	125	71
1989	21,036	9,495	11,541	2,903	4,788	137	109	58	2,262	1,390	872	75	120	67
1990	21,537	9,752	11,786	2,914	4,825	133	106	57	2,370	1,448	922	75	118	63
1991	21,978	9,985	11,992	2,918	4,850	130	106	55	2,523	1,529	994	76	119	61
1992	22,434	10,218	12,216	2,928	4,871	129	103	54	2,738	1,643	1,094	78	125	61
1993	22,796	10,404	12,392	2,912	4,870	126	103	53	2,935	1,743	1,192	78	127	59
1994	23,124	10,573	12,552	2,885	4,862	123	100	51	3,121	1,830	1,292	76	128	57
1995	23,433	10,732	12,701	2,845	4,841	120	97	49	3,305	1,909	1,396	75	124	55
1996	23,705	10,874	12,831	2,799	4,815	117	78	41	3,473	1,973	1,500	61	104	53
1997	24,124	11,027	13,097	2,759	4,657	113	74	37	3,593	2,006	1,588	57	91	53
1998	24,409	11,163	13,246	2,703	4,589	111	69	34	3,769	2,074	1,695	52	80	53
1999	24,730	11,337	13,394	2,651	4,536	107	67	32	3,924	2,131	1,793	49	72	52
2000	25,452	11,780	13,672	2,638	4,491	102	65	30	4,080	2,191	1,890	45	65	50
2001	25,838	11,990	13,848	2,581	4,416	98	63	29	4,292	2,282	2,010	43	60	51
2002	26,247	12,218	14,029	2,525	4,353	98	62	28	4,536	2,391	2,145	41	56	50
<i>Average monthly family benefit (dollars)</i>														
1945	23.50	24.50	19.50	38.50	20.20	34.10	47.70	50.40	...	...	...	...	...	...
1950	42.20	44.60	34.80	71.70	36.50	76.90	93.90	92.40	...	...	...	...	...	...
1955	59.10	64.60	49.80	103.50	48.70	106.80	135.40	133.20	...	...	...	...	...	...
1960	69.90	79.90	59.60	123.90	57.70	131.70	188.00	181.70	87.90	91.90	76.90	184.70	192.20	135.50
1965	80.10	90.50	70.00	141.50	73.90	153.00	219.80	218.10	95.40	100.70	85.00	201.00	216.30	145.90
1970	114.20	128.70	101.60	198.90	102.40	213.00	291.10	289.90	128.10	136.30	113.10	264.10	273.20	199.20
1975	201.60	225.50	181.80	343.90	195.90	367.20	468.60	461.80	218.90	240.00	185.00	441.00	454.00	344.00
1980	333.00	377.10	297.40	566.60	311.60	612.80	759.20	740.50	355.40	396.20	291.70	727.00	746.10	573.00
1985	465.80	531.80	412.00	813.90	434.30	829.60	981.50	924.90	466.90	523.10	374.60	898.10	895.20	765.00
1986	475.20	542.60	420.10	831.30	444.90	841.70	994.00	939.80	470.70	527.80	377.40	896.90	888.30	773.30
1987	499.20	570.40	440.80	873.30	468.70	882.10	1,032.30	968.90	491.60	552.00	392.60	929.40	918.30	815.50
1988	522.70	597.20	461.70	914.10	493.60	921.80	1,070.40	1,012.90	512.20	576.10	409.50	960.20	938.40	855.40
1989	552.10	630.70	487.40	965.60	522.80	967.80	1,120.00	1,064.60	539.30	607.10	431.20	1,009.40	971.90	903.70
1990	588.30	671.90	519.10	1,026.60	557.90	1,020.20	1,177.70	1,124.60	570.40	642.80	456.80	1,062.10	1,016.00	960.80
1991	614.70	702.00	542.10	1,071.70	584.90	1,059.80	1,216.80	1,160.60	592.30	668.40	475.50	1,098.00	1,043.30	1,004.70
1992	637.80	728.10	562.30	1,110.50	609.00	1,086.90	1,252.40	1,190.80	609.50	688.70	490.70	1,122.10	1,057.40	1,045.00
1993	659.10	751.90	581.20	1,145.40	632.20	1,114.20	1,282.60	1,229.40	625.50	707.20	506.00	1,143.00	1,074.20	1,078.20
1994	682.30	777.80	601.80	1,183.70	657.10	1,150.10	1,328.40	1,271.00	646.20	731.80	525.00	1,177.60	1,100.00	1,118.60
1995	704.80	803.00	621.80	1,220.60	681.60	1,184.50	1,365.50	1,299.80	667.60	757.40	544.80	1,205.50	1,130.90	1,159.90
1996	730.00	831.10	644.20	1,262.10	708.70	1,222.50	1,450.60	1,347.20	690.60	785.30	566.00	1,245.90	1,148.50	1,200.60
1997	750.20	853.70	663.10	1,294.60	733.20	1,250.30	1,502.60	1,358.00	708.00	806.60	583.60	1,280.20	1,165.90	1,238.50
1998	765.10	870.50	676.40	1,317.70	750.90	1,277.00	1,537.70	1,393.20	720.00	820.20	597.40	1,300.40	1,189.40	1,261.90
1999	789.80	898.60	697.70	1,356.80	776.60	1,325.40	1,590.40	1,446.30	741.20	844.50	618.50	1,344.90	1,224.20	1,295.30
2000	830.10	945.90	730.30	1,419.90	812.30	1,387.90	1,675.40	1,513.20	773.60	880.70	649.40	1,394.20	1,274.30	1,355.50
2001	860.20	979.90	756.60	1,465.50	842.90	1,439.70	1,755.10	1,600.60	801.20	911.00	676.60	1,440.70	1,317.90	1,405.70
2002	881.30	1,003.80	774.60	1,494.20	863.40	1,473.20	1,812.10	1,664.50	820.50	931.90	696.40	1,468.10	1,352.50	1,449.20

a. Wife's entitlement based on age.

b. Wife's entitlement based on care of children.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2002 are based on a 10 percent sample. Data for prior years are based on different sampling rates.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H2—Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2002

Family group	Number ^a (thousands)		Average primary insurance amount (dollars)	Average monthly family benefit (dollars)
	Families	Beneficiaries		
Retired-worker families				
Worker only	26,247	26,247	882.90	881.30
Men	12,218	12,218	1,106.40	1,003.80
Full benefit	3,767	3,767	1,141.20	1,180.90
Reduced benefit	8,451	8,451	1,090.90	924.90
Women	14,029	14,029	688.20	774.60
Full benefit	3,551	3,551	774.30	888.30
Reduced benefit	10,478	10,478	659.10	736.10
Worker and wife	2,525	5,051	1,125.30	1,494.20
Full worker benefit	867	1,735	1,179.80	1,732.70
Reduced worker benefit	1,658	3,316	1,096.80	1,369.40
Worker and husband	34	68	555.80	775.20
Worker and children	289	634	1,025.80	1,470.80
Male worker ^b	256	565	1,060.60	1,518.40
Female worker ^c	33	70	751.70	1,096.20
Worker, wife, and children	100	327	1,074.90	1,768.60
Worker, wife, and 1 child	82	246	1,083.70	1,777.30
Full worker benefit	25	76	1,109.30	1,963.60
Reduced worker benefit	56	169	1,072.00	1,693.10
Worker, wife, and 2 or more children	18	82	1,036.30	1,730.10
Full worker benefit	5	24	1,044.50	1,873.60
Reduced worker benefit	13	58	1,032.90	1,671.10
Survivor families				
Nondisabled widow(er) only	4,392	4,392	1,015.80	861.60
Full benefit	1,846	1,846	1,019.20	963.60
Reduced benefit	2,546	2,546	1,013.40	787.70
Nondisabled widow(er) and children	95	196	932.40	1,494.90
Full benefit	58	119	914.90	1,523.30
Reduced benefit	37	77	960.50	1,451.00
Disabled widow(er) only	186	186	1,015.20	545.80
Widowed mother or father and children	188	507	1,003.70	1,613.60
1 child	98	196	989.60	1,473.20
2 children	62	187	1,043.60	1,812.10
3 or more children	28	124	964.60	1,664.50
Children only	1,089	1,485	826.20	784.60
1 child	804	804	829.30	620.30
2 children	204	408	831.10	1,224.80
3 or more children	81	273	782.60	1,306.30
Parents	2	2	975.30	790.70
Disabled-worker families				
Worker only	4,536	4,536	823.90	820.50
Men	2,391	2,391	937.50	931.90
Women	2,145	2,145	697.20	696.40
Worker and spouse ^d	50	100	1,169.70	1,449.20
Worker and children	850	2,170	889.90	1,279.40
Male worker	533	1,372	946.90	1,368.50
Female worker	318	798	794.50	1,130.20
Worker, wife, and children	97	384	956.40	1,401.40
1 child	41	123	991.40	1,468.10
2 or more children	56	260	930.80	1,352.50
Worker, husband, and children	2	7	790.00	1,128.70

a. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

b. Includes 178,100 families with reduced retired-worker benefits.

c. Includes 32,500 families with reduced retired-worker benefits.

d. Where the disabled worker's spouse is dually entitled as a retired worker, the benefit amount shown for the spouse represents the difference between the entitlement amount as a spouse and as a retired worker.

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

NOTE: The term "full benefit" applies to benefits not subject to actuarial reduction, and the term "reduced benefit" applies to benefits subject to actuarial reduction.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2002

Monthly family benefit ^a (dollars)	Retired worker only		Retired worker and wife	Retired worker, wife, and—		Disabled worker only		Disabled worker, wife, and—	
	Men	Women		1 child	2 or more children	Men	Women	1 child	2 or more children
Total	12,217,930	14,028,990	2,525,410	81,850	18,460	2,391,130	2,144,590	41,130	56,170
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	1.4	1.5	0.6	0.3	0.3	0.9	2.0	0.3	0.4
200.00–249.90	0.9	1.1	0.4	0.2	0.2	0.9	2.1	0.0	0.2
250.00–299.90	1.0	1.4	0.5	0.2	0.5	1.1	2.7	0.1	0.1
300.00–349.90	1.1	1.8	0.5	0.5	0.3	1.5	3.3	0.2	0.2
350.00–399.90	1.3	2.6	0.7	0.5	0.5	1.5	3.5	0.2	0.3
400.00–449.90	1.7	4.2	0.7	0.6	0.9	1.9	3.9	0.1	0.2
450.00–499.90	2.0	6.4	0.7	0.8	0.7	3.5	7.4	0.6	0.9
500.00–549.90	2.2	8.5	0.8	0.6	0.7	4.4	8.9	0.9	1.4
550.00–599.90	2.3	7.6	0.9	0.7	1.0	4.8	8.6	1.6	1.9
600.00–649.90	2.5	6.5	1.1	1.2	1.8	4.9	7.9	1.7	2.1
650.00–699.90	2.7	5.8	1.3	1.2	1.8	4.9	7.2	1.3	2.1
700.00–749.90	3.0	5.2	1.4	1.4	2.6	5.0	6.3	1.9	2.6
750.00–799.90	3.4	5.0	1.4	1.7	2.1	4.8	5.6	1.8	2.9
800.00–849.90	3.9	4.7	1.4	1.6	2.3	4.7	4.9	2.3	2.8
850.00–899.90	4.6	4.8	1.5	1.5	2.3	4.6	4.1	2.4	2.6
900.00–949.90	5.5	4.6	1.6	1.3	1.9	4.4	3.6	2.6	3.1
950.00–999.90	6.0	4.5	1.7	1.1	1.5	4.3	3.1	2.5	3.4
1,000.00–1,049.90	6.8	4.2	1.8	1.0	2.1	4.2	2.6	3.5	4.1
1,050.00–1,099.90	7.5	3.8	1.9	1.4	1.7	3.9	2.2	3.3	4.2
1,100.00–1,149.90	6.4	3.0	2.1	1.3	1.1	3.6	1.8	3.4	4.1
1,150.00–1,199.90	5.8	2.6	2.3	1.4	0.9	3.5	1.5	3.7	4.7
1,200.00–1,249.90	5.2	2.2	2.5	1.4	1.8	3.5	1.3	3.5	4.6
1,250.00–1,299.90	4.7	1.8	2.8	1.2	1.6	3.6	1.2	3.8	4.0
1,300.00–1,349.90	4.3	1.6	3.2	1.5	1.3	4.0	1.2	3.1	3.6
1,350.00–1,399.90	3.2	1.1	3.9	1.4	2.0	3.5	0.9	3.5	3.3
1,400.00–1,449.90	2.4	0.9	4.3	1.4	1.4	3.1	0.8	3.7	3.2
1,450.00–1,499.90	1.8	0.6	4.5	1.3	2.0	2.7	0.6	3.5	2.7
1,500.00–1,549.90	1.4	0.5	5.2	1.8	1.8	2.1	0.4	2.9	2.6
1,550.00–1,599.90	1.3	0.3	5.8	1.9	1.1	1.5	0.3	2.7	2.9
1,600.00–1,649.90	^b 3.4	^b 0.9	5.3	2.3	1.9	^b 2.6	^b 0.4	2.0	2.3
1,650.00–1,699.90	...	...	4.6	2.5	2.2	...	...	2.4	1.6
1,700.00–1,749.90	...	...	4.2	3.3	2.5	...	...	2.1	1.9
1,750.00–1,799.90	...	...	3.8	3.0	2.7	...	...	2.7	1.5
1,800.00–1,849.90	...	...	3.4	3.5	2.1	...	...	2.5	1.9
1,850.00–1,899.90	...	...	3.0	3.7	3.0	...	...	3.2	1.6
1,900.00–1,949.90	...	...	2.6	3.9	3.3	...	...	2.3	1.8
1,950.00–1,999.90	...	...	2.3	4.4	2.4	...	...	2.6	1.8
2,000.00–2,049.90	...	...	1.9	3.8	3.4	...	...	2.6	1.7
2,050.00–2,099.90	...	...	1.7	4.3	2.4	...	...	1.9	1.3
2,100.00–2,149.90	...	...	1.4	3.8	3.5	...	...	1.8	1.3
2,150.00–2,199.90	...	...	1.2	3.2	2.9	...	...	1.9	1.5
2,200.00–2,249.90	...	...	1.1	2.8	2.9	...	...	1.8	1.4
2,250.00–2,299.90	...	...	0.9	2.9	2.3	...	...	1.3	1.0
2,300.00–2,349.90	...	...	0.8	2.7	2.2	...	...	1.3	1.3
2,350.00–2,399.90	...	...	0.7	2.6	1.8	...	...	1.1	0.8
2,400.00–2,449.90	...	...	0.6	2.1	2.1	...	...	1.3	0.7
2,450.00–2,499.90	...	...	0.5	1.8	2.4	...	...	0.8	0.4
2,500.00–2,549.90	...	...	0.4	1.6	2.1	...	...	0.6	0.7
2,550.00–2,599.90	...	...	0.4	1.6	1.6	...	...	0.5	0.3
2,600.00–2,649.90	...	...	0.4	1.4	1.4	...	...	0.2	0.4
2,650.00–2,699.90	...	...	0.3	0.8	1.0	...	...	0.4	0.3
2,700.00 or more	...	...	1.3	5.4	8.0	...	...	1.1	1.1
Average monthly family benefit (dollars)	1,003.80	774.60	1,494.20	1,777.30	1,730.10	931.90	696.40	1,468.10	1,352.50

a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.

b. \$1,600 or more.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2002

Monthly family benefit (dollars)	Widowed mother or father and—			Children only			Widow only	
	1 child	2 children	3 or more children	1 child	2 children	3 or more children	Nondisabled	Disabled
Total								
Number	98,040	62,190	27,990	803,890	204,100	80,820	4,353,130	180,810
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	0.2	0.1	0.3	3.4	1.2	1.2	0.7	9.9
200.00–249.90	0.2	0.2	0.4	2.0	0.9	1.3	0.8	4.9
250.00–299.90	0.4	0.3	0.4	2.0	1.2	1.6	1.3	4.9
300.00–349.90	0.4	0.4	0.6	6.8	1.5	2.0	1.9	5.5
350.00–399.90	0.6	0.6	0.8	7.0	1.5	2.2	2.0	6.9
400.00–449.90	0.7	0.5	0.6	7.4	1.5	2.1	2.5	6.9
450.00–499.90	0.9	0.6	0.6	7.3	2.0	2.3	2.9	7.1
500.00–549.90	0.5	0.6	1.1	7.1	1.7	2.0	3.2	6.8
550.00–599.90	0.6	0.7	1.1	7.6	1.4	1.9	3.7	5.9
600.00–649.90	1.0	0.7	0.9	7.4	1.7	1.9	4.6	5.7
650.00–699.90	1.1	0.9	1.4	6.9	2.0	2.3	5.2	5.5
700.00–749.90	1.9	1.3	2.3	5.8	3.1	3.4	6.0	5.2
750.00–799.90	2.4	1.8	3.3	5.1	3.6	3.9	6.2	4.2
800.00–849.90	2.6	2.1	2.6	4.4	4.0	4.2	6.8	3.9
850.00–899.90	2.7	2.4	3.6	3.8	4.1	3.9	7.4	3.2
900.00–949.90	2.7	2.7	3.8	3.4	3.8	3.9	7.6	4.2
950.00–999.90	2.8	2.0	3.1	3.5	4.1	3.5	7.1	3.4
1,000.00–1,049.90	2.9	1.6	2.6	2.7	3.8	3.0	6.1	2.4
1,050.00–1,099.90	3.0	2.0	2.0	2.0	3.6	2.7	5.1	1.6
1,100.00–1,149.90	3.1	1.5	1.5	^a 4.3	3.7	2.0	4.0	^a 1.6
1,150.00–1,199.90	3.2	1.3	1.6	...	3.4	1.8	3.1	...
1,200.00–1,249.90	3.1	1.6	2.2	...	3.3	1.7	2.6	...
1,250.00–1,299.90	3.4	1.6	1.1	...	3.2	1.7	2.1	...
1,300.00–1,349.90	3.3	1.5	2.1	...	3.0	1.5	1.8	...
1,350.00–1,399.90	3.3	2.1	1.7	...	2.7	1.8	1.2	...
1,400.00–1,449.90	3.2	1.9	1.2	...	2.6	1.9	0.9	...
1,450.00–1,499.90	2.9	1.6	2.2	...	2.3	1.8	0.6	...
1,500.00–1,549.90	3.1	2.3	2.1	...	2.3	1.4	^b 2.2	...
1,550.00–1,599.90	3.0	1.7	1.6	...	1.9	1.7	...	...
1,600.00–1,649.90	2.6	1.6	1.9	...	1.9	1.6	...	...
1,650.00–1,699.90	3.0	2.2	1.3	...	1.8	1.7	...	...
1,700.00–1,749.90	2.4	2.0	1.5	...	1.7	1.5	...	...
1,750.00–1,799.90	2.5	2.4	2.1	...	1.6	1.6	...	...
1,800.00–1,849.90	2.5	2.4	2.1	...	1.4	1.7	...	...
1,850.00–1,899.90	2.7	2.8	1.5	...	1.5	1.7	...	...
1,900.00–1,949.90	2.7	2.4	2.6	...	1.6	1.6	...	...
1,950.00–1,999.90	2.5	2.5	1.9	...	1.6	1.9	...	...
2,000.00–2,049.90	2.5	2.5	2.9	...	1.4	1.5	...	...
2,050.00–2,099.90	2.3	2.4	2.0	...	1.3	1.5	...	...
2,100.00–2,149.90	2.1	2.6	2.4	...	1.4	1.4	...	...
2,150.00–2,199.90	2.0	2.3	1.7	...	1.2	1.5	...	...
2,200.00–2,249.90	1.9	2.1	2.2	...	1.1	0.9	...	...
2,250.00–2,299.90	1.7	2.8	1.8	...	0.9	1.3	...	...
2,300.00–2,349.90	1.3	2.9	1.6	...	0.9	1.2	...	...
2,350.00–2,399.90	1.4	2.2	1.4	...	0.8	1.0	...	...
2,400.00–2,449.90	1.0	2.0	2.0	...	0.8	1.0	...	...
2,450.00–2,499.90	0.8	1.8	1.3	...	0.5	1.0	...	...
2,500.00–2,549.90	0.6	1.9	1.2	...	0.3	0.8	...	...
2,550.00–2,599.90	0.4	1.5	1.2	...	0.3	0.8	...	...
2,600.00–2,649.90	0.4	1.9	1.4	...	0.3	0.8	...	...
2,650.00–2,699.90	0.4	1.5	1.3	...	0.2	0.6	...	...
2,700.00 or more	0.9	12.4	11.6	...	0.4	4.4	...	...
Average monthly family benefit (dollars)	1,473.20	1,812.10	1,664.50	620.30	1,224.80	1,306.30	863.40	550.80

a. \$1,100 or more.

b. \$1,500 or more.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J1—Estimated total benefits paid, by state or other area and program, 2002 (in millions of dollars)

State or area	Total, OASDI	Retirement	Survivors	Disability
All areas	453,601	303,983	83,973	65,645
Alabama	7,885	4,695	1,598	1,592
Alaska	545	344	106	95
Arizona	8,240	5,727	1,323	1,190
Arkansas	4,749	2,908	896	945
California	42,331	29,237	7,414	5,679
Colorado	5,280	3,550	973	758
Connecticut	6,247	4,587	959	702
Delaware	1,445	989	247	210
District of Columbia	624	416	114	94
Florida	32,019	22,871	5,164	3,984
Georgia	10,799	6,754	2,045	1,999
Hawaii	1,855	1,393	273	189
Idaho	1,951	1,340	343	268
Illinois	19,186	13,131	3,728	2,327
Indiana	10,381	6,984	1,970	1,427
Iowa	5,348	3,711	1,029	608
Kansas	4,440	3,076	840	524
Kentucky	6,930	3,913	1,418	1,599
Louisiana	6,581	3,701	1,693	1,187
Maine	2,321	1,500	404	416
Maryland	7,426	5,063	1,408	955
Massachusetts	10,538	7,225	1,744	1,568
Michigan	17,636	11,663	3,386	2,587
Minnesota	7,412	5,206	1,349	858
Mississippi	4,641	2,652	931	1,058
Missouri	9,866	6,461	1,818	1,587
Montana	1,525	1,028	286	212
Nebraska	2,773	1,936	522	315
Nevada	3,121	2,199	462	460
New Hampshire	2,083	1,442	335	306
New Jersey	14,828	10,605	2,474	1,750
New Mexico	2,589	1,698	486	404
New York	31,358	21,651	5,216	4,491
North Carolina	13,284	8,685	2,171	2,428
North Dakota	1,056	705	240	110
Ohio	19,349	12,750	4,144	2,455
Oklahoma	5,712	3,704	1,156	852
Oregon	5,847	4,087	999	761
Pennsylvania	24,235	16,587	4,731	2,917
Rhode Island	1,892	1,323	280	289
South Carolina	6,763	4,291	1,166	1,307
South Dakota	1,242	842	258	142
Tennessee	9,652	6,035	1,854	1,763
Texas	25,804	16,782	5,598	3,424
Utah	2,439	1,719	432	288
Vermont	1,022	689	173	160
Virginia	10,284	6,739	1,883	1,663
Washington	8,907	6,212	1,498	1,197
West Virginia	3,874	2,136	891	847
Wisconsin	9,239	6,543	1,632	1,064
Wyoming	777	543	131	103
Outlying areas				
American Samoa	32	10	10	12
Guam	77	47	19	11
Northern Mariana Islands	9	5	3	1
Puerto Rico	4,509	2,235	909	1,365
Virgin Islands	118	83	19	16
Foreign countries	2,492	1,556	812	124

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

NOTE: Unnegotiated checks not deducted. Excludes lump-sum death payments.

CONTACT: Rona Blumenthal (410) 965-0163 or Cherice N. Jefferies (410) 965-5520.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2002

State or area	Total ^a	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas ^b	46,452,550	29,203,660	2,681,090	477,380	4,965,150	1,905,050	5,535,860	151,260	1,533,090
Alabama	856,990	472,820	45,420	9,930	101,890	41,870	139,260	4,320	41,480
Alaska	58,980	34,430	2,650	1,040	5,090	4,800	8,110	150	2,710
Arizona	834,520	543,980	48,910	7,470	76,480	30,880	97,760	2,410	26,630
Arkansas	528,840	302,380	27,860	5,100	59,730	22,880	84,890	2,130	23,870
California	4,304,080	2,778,110	279,830	52,340	417,640	170,620	474,520	11,940	119,080
Colorado	549,870	348,260	36,200	4,670	56,640	21,680	64,170	1,430	16,820
Connecticut	581,160	405,620	25,540	5,560	50,760	19,920	56,890	990	15,880
Delaware	140,960	91,780	6,920	1,490	13,540	5,220	17,220	300	4,490
District of Columbia	73,280	47,980	2,700	710	7,320	4,530	8,840	50	1,150
Florida	3,278,010	2,222,990	178,280	31,380	304,890	108,130	336,340	7,760	88,240
Georgia	1,146,950	676,110	52,380	11,050	121,630	62,240	171,920	4,160	47,460
Hawaii	193,220	137,430	9,520	2,640	16,310	6,740	15,680	500	4,400
Idaho	204,970	131,560	13,350	1,580	20,080	8,090	23,300	680	6,330
Illinois	1,862,070	1,209,350	101,290	19,010	204,370	80,490	189,620	4,100	53,840
Indiana	1,012,160	641,590	53,820	8,850	109,760	41,220	119,440	2,800	34,680
Iowa	542,290	354,510	36,470	4,000	62,690	16,860	53,210	1,120	13,430
Kansas	441,780	288,040	26,370	3,400	48,210	16,560	45,290	720	13,190
Kentucky	754,480	394,930	45,610	7,060	94,640	31,220	135,740	6,090	39,190
Louisiana	725,200	370,860	55,180	9,880	107,620	44,010	97,970	5,080	34,600
Maine	258,140	156,590	13,580	2,390	25,870	8,320	38,580	1,000	11,810
Maryland	743,760	487,150	36,780	7,020	77,060	37,770	77,560	1,140	19,280
Massachusetts	1,062,670	695,490	48,410	10,030	99,900	35,070	133,310	2,240	38,220
Michigan	1,677,280	1,036,350	98,640	17,400	186,000	70,980	202,770	5,060	60,080
Minnesota	755,250	503,150	46,520	6,140	79,400	25,450	74,630	1,030	18,930
Mississippi	531,390	280,600	22,960	7,270	59,610	31,720	94,250	3,030	31,950
Missouri	1,021,950	629,860	54,460	8,820	107,180	42,810	137,200	3,180	38,440
Montana	161,580	101,850	10,630	1,620	17,260	6,350	18,290	640	4,940
Nebraska	287,040	188,370	19,190	2,310	30,970	9,840	28,230	460	7,670
Nevada	314,120	214,020	14,560	3,180	25,620	10,630	36,790	560	8,760
New Hampshire	207,860	137,330	8,970	1,690	18,220	7,540	25,450	440	8,220
New Jersey	1,363,370	936,660	57,290	13,130	131,330	50,380	134,980	3,050	36,550
New Mexico	289,570	172,710	20,750	3,700	30,050	14,940	35,460	1,430	10,530
New York	3,024,130	1,975,090	145,380	35,600	288,840	112,990	355,400	9,450	101,380
North Carolina	1,406,150	873,480	56,740	11,140	134,770	59,180	211,470	4,230	55,140
North Dakota	113,960	70,750	9,890	860	16,050	3,610	9,980	220	2,600
Ohio	1,929,680	1,185,340	136,640	17,960	245,960	74,140	209,210	5,080	55,350
Oklahoma	605,840	371,420	35,700	5,510	71,220	27,660	73,620	2,390	18,320
Oregon	587,580	389,090	34,650	5,320	57,550	19,670	65,490	1,640	14,170
Pennsylvania	2,376,520	1,549,200	134,550	19,220	277,320	81,970	242,990	6,820	64,450
Rhode Island	191,490	129,110	6,430	1,560	15,780	6,290	24,950	490	6,880
South Carolina	718,990	431,300	29,620	6,400	70,620	35,960	111,370	2,400	31,320
South Dakota	137,630	87,270	10,050	1,100	16,130	6,000	13,000	220	3,860
Tennessee	1,028,360	600,670	53,710	9,730	116,010	48,130	154,500	4,690	40,920
Texas	2,730,970	1,637,500	194,710	32,340	338,350	138,680	293,030	11,280	85,080
Utah	250,840	162,740	17,420	2,870	22,160	13,090	24,050	490	8,020
Vermont	106,860	67,710	5,590	1,140	10,220	3,810	13,780	340	4,270
Virginia	1,072,310	665,380	56,990	9,650	113,500	44,380	139,550	3,880	38,980
Washington	874,040	573,430	52,980	8,080	82,980	30,910	100,830	1,940	22,890
West Virginia	398,700	202,840	28,770	3,940	57,400	16,450	68,190	3,830	17,280
Wisconsin	915,290	615,570	50,700	7,540	93,110	31,460	91,260	1,250	24,400
Wyoming	79,190	52,300	4,710	540	7,240	3,190	8,560	230	2,420
Outlying areas									
American Samoa	5,470	1,440	200	320	550	930	1,210	50	770
Guam	11,700	6,020	1,060	630	1,110	1,330	960	110	480
Northern Mariana Islands	1,770	830	90	270	210	250	90	0	30
Puerto Rico	688,140	310,030	54,200	15,640	81,360	39,000	131,340	9,370	47,200
Virgin Islands	14,560	9,230	940	490	1,200	890	1,260	70	480
Foreign countries	414,360	241,050	57,840	7,530	77,420	14,720	11,820	770	3,210

a. Includes special age-72 beneficiaries.

b. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J3—Number and total monthly benefits for beneficiaries aged 65 or older, by state or other area and sex, December 2002

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
All areas ^a	33,179,470	13,862,580	19,316,890	28,668,611	13,949,974	14,718,638
Alabama	548,630	221,790	326,840	446,378	212,722	233,656
Alaska	35,920	17,370	18,550	30,371	16,807	13,563
Arizona	598,020	263,980	334,040	526,736	269,668	257,068
Arkansas	345,960	142,870	203,090	274,333	132,396	141,937
California	3,160,870	1,369,690	1,791,180	2,754,675	1,371,749	1,382,926
Colorado	397,170	170,880	226,290	334,595	169,223	165,372
Connecticut	446,780	182,550	264,230	429,059	204,956	224,103
Delaware	100,470	42,200	58,270	91,513	44,875	46,638
District of Columbia	54,150	21,220	32,930	40,009	17,868	22,141
Florida	2,449,600	1,064,860	1,384,740	2,126,691	1,070,026	1,056,665
Georgia	749,670	302,840	446,830	627,191	298,821	328,371
Hawaii	148,730	64,510	84,220	126,769	62,024	64,745
Idaho	146,580	64,390	82,190	123,855	63,812	60,042
Illinois	1,374,970	561,740	813,230	1,251,207	594,491	656,716
Indiana	719,680	292,140	427,540	654,427	311,072	343,355
Iowa	413,640	170,590	243,050	355,226	172,584	182,643
Kansas	331,580	136,090	195,490	295,096	142,148	152,948
Kentucky	473,630	194,530	279,100	379,021	182,789	196,232
Louisiana	471,440	194,540	276,900	371,366	182,464	188,901
Maine	178,120	75,510	102,610	142,810	70,511	72,298
Maryland	544,120	222,330	321,790	476,844	225,623	251,222
Massachusetts	784,910	316,240	468,670	690,555	324,759	365,796
Michigan	1,178,500	489,490	689,010	1,092,606	533,032	559,574
Minnesota	568,590	236,770	331,820	486,788	238,341	248,447
Mississippi	320,560	129,180	191,380	250,722	118,972	131,750
Missouri	709,180	293,160	416,020	606,710	293,416	313,295
Montana	115,210	50,670	64,540	96,010	49,044	46,966
Nebraska	219,300	90,500	128,800	186,168	90,332	95,836
Nevada	223,520	105,350	118,170	197,832	105,789	92,043
New Hampshire	148,790	63,570	85,220	132,981	66,474	66,507
New Jersey	1,034,480	418,490	615,990	999,464	470,357	529,107
New Mexico	197,550	88,040	109,510	157,552	81,897	75,655
New York	2,191,890	889,330	1,302,560	2,022,647	945,897	1,076,750
North Carolina	948,750	384,190	564,560	797,203	377,639	419,565
North Dakota	88,470	36,860	51,610	70,282	34,650	35,632
Ohio	1,416,190	580,440	835,750	1,238,681	600,737	637,944
Oklahoma	425,390	176,670	248,720	351,715	169,244	182,471
Oregon	429,740	184,950	244,790	377,266	188,366	188,899
Pennsylvania	1,782,230	716,130	1,066,100	1,590,637	751,828	838,808
Rhode Island	140,160	56,010	84,150	123,542	57,036	66,506
South Carolina	467,860	190,710	277,150	392,460	188,265	204,195
South Dakota	103,890	43,490	60,400	81,826	40,170	41,656
Tennessee	679,240	274,900	404,340	565,676	269,236	296,439
Texas	1,928,380	823,490	1,104,890	1,609,493	807,996	801,498
Utah	181,780	79,760	102,020	158,298	82,219	76,079
Vermont	75,210	31,950	43,260	64,392	31,800	32,593
Virginia	747,420	308,530	438,890	630,981	304,406	326,574
Washington	637,350	273,830	363,520	574,381	287,543	286,838
West Virginia	256,140	104,530	151,610	213,051	102,249	110,802
Wisconsin	683,440	287,200	396,240	607,077	298,945	308,132
Wyoming	57,290	26,040	31,250	49,570	26,468	23,102
Outlying areas						
American Samoa	1,700	810	890	872	493	379
Guam	6,900	3,610	3,290	4,094	2,441	1,653
Northern Mariana Islands	810	480	330	391	251	140
Puerto Rico	383,690	172,280	211,410	210,369	108,572	101,797
Virgin Islands	9,650	4,490	5,160	7,014	3,668	3,346
Foreign countries	343,130	152,180	190,950	169,174	79,321	89,853

a. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J4—Total monthly benefits, by state or other area, program, and type of benefit, December 2002
(in thousands of dollars)**

State or area	Total ^a	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas ^b	37,860,478	26,138,251	1,211,506	204,168	4,168,290	1,112,937	4,617,688	32,004	375,634
Alabama	649,917	401,816	20,136	4,112	77,766	23,170	112,153	872	9,893
Alaska	45,333	29,880	1,101	430	3,925	2,707	6,632	26	633
Arizona	696,137	495,097	22,624	3,075	66,320	17,437	84,574	523	6,488
Arkansas	392,744	250,129	11,638	2,067	44,325	12,010	66,715	387	5,473
California	3,550,271	2,502,388	125,391	21,754	364,068	101,173	402,839	2,514	30,144
Colorado	441,260	303,952	16,375	2,078	48,096	13,150	52,962	287	4,360
Connecticut	527,872	398,045	13,294	2,726	47,522	12,885	49,130	181	4,089
Delaware	121,606	85,901	3,447	675	12,201	3,253	14,900	59	1,170
District of Columbia	52,002	36,347	1,066	262	5,106	2,060	6,870	15	276
Florida	2,706,240	1,980,797	81,499	13,030	263,849	61,782	281,714	1,706	21,864
Georgia	896,372	585,730	23,827	4,735	94,277	35,019	140,267	846	11,673
Hawaii	158,309	121,403	4,051	1,096	13,259	3,989	13,282	115	1,114
Idaho	164,248	114,857	6,073	721	17,135	4,704	19,166	136	1,456
Illinois	1,599,734	1,130,179	49,010	8,745	184,255	49,382	163,388	914	13,860
Indiana	865,504	601,446	26,331	4,272	98,253	25,816	100,486	609	8,291
Iowa	446,362	316,614	16,832	1,901	54,312	10,285	42,840	253	3,326
Kansas	371,126	264,147	12,552	1,560	43,177	9,790	36,679	152	3,070
Kentucky	566,640	332,649	19,338	2,843	71,725	17,608	111,583	1,340	9,554
Louisiana	532,896	307,854	23,644	3,786	83,040	23,627	81,744	1,127	8,073
Maine	193,422	128,988	5,932	991	20,681	4,895	29,362	162	2,412
Maryland	620,451	438,753	17,193	3,236	66,050	22,436	67,287	284	5,211
Massachusetts	881,448	625,667	22,789	4,381	87,232	22,045	109,570	432	9,333
Michigan	1,466,023	998,788	49,133	8,304	167,906	44,131	180,910	1,120	15,732
Minnesota	621,997	447,573	21,269	2,850	68,394	16,169	60,907	221	4,613
Mississippi	380,924	228,521	9,706	2,777	42,431	16,389	73,448	551	7,102
Missouri	821,032	556,480	24,663	4,011	89,568	24,796	111,841	637	9,036
Montana	127,349	87,770	4,745	629	14,378	3,694	14,878	128	1,128
Nebraska	231,935	165,277	8,720	1,081	26,887	5,869	22,221	88	1,792
Nevada	265,838	193,273	6,607	1,364	22,577	6,648	32,990	137	2,242
New Hampshire	175,303	125,599	4,333	798	16,180	4,819	21,321	108	2,144
New Jersey	1,248,339	925,886	28,589	6,254	122,156	32,628	121,825	715	10,286
New Mexico	215,872	144,210	8,560	1,398	23,367	7,330	28,341	284	2,381
New York	2,625,447	1,873,672	68,753	16,078	256,251	69,646	313,305	2,108	25,634
North Carolina	1,113,275	758,816	25,780	4,889	103,736	33,530	172,007	808	13,709
North Dakota	87,116	59,034	4,182	372	13,103	1,940	7,789	55	642
Ohio	1,599,757	1,080,240	64,103	8,194	215,807	44,475	172,378	1,257	13,302
Oklahoma	474,221	318,030	15,575	2,393	57,694	15,395	60,167	521	4,446
Oregon	491,776	352,027	16,108	2,448	50,940	12,050	54,204	395	3,603
Pennsylvania	2,020,060	1,425,729	64,892	9,038	246,111	50,411	206,779	1,480	15,621
Rhode Island	158,808	115,526	3,014	635	13,834	3,809	20,353	90	1,546
South Carolina	564,192	374,159	13,575	2,835	53,706	19,963	91,685	489	7,780
South Dakota	103,560	71,742	4,238	423	12,969	3,252	10,004	36	896
Tennessee	800,370	519,970	24,207	4,144	90,683	26,607	123,814	940	10,006
Texas	2,143,664	1,426,720	85,743	12,545	275,005	78,605	242,161	2,338	20,547
Utah	205,381	146,405	8,290	1,352	19,738	7,702	19,815	95	1,984
Vermont	85,696	59,756	2,499	491	8,544	2,293	11,043	65	1,007
Virginia	857,390	582,112	26,009	4,340	91,110	26,803	116,497	869	9,650
Washington	750,117	534,372	25,621	3,811	74,853	19,437	85,400	478	6,145
West Virginia	314,305	178,987	12,685	1,630	46,203	9,650	59,786	939	4,425
Wisconsin	776,678	564,521	23,917	3,718	82,919	19,707	75,597	285	6,015
Wyoming	65,333	46,796	2,203	268	6,271	1,984	7,177	52	583
Outlying areas									
American Samoa	2,431	777	49	104	259	347	752	6	137
Guam	6,327	3,757	305	197	664	575	711	21	96
Northern Mariana Islands	707	390	16	48	83	127	35	0	8
Puerto Rico	364,396	183,671	15,149	4,238	42,181	15,268	93,628	1,556	8,705
Virgin Islands	9,993	7,074	345	178	796	424	1,044	14	117
Foreign countries	202,021	126,163	13,570	1,800	44,169	6,946	8,490	164	720

a. Includes special age-72 beneficiaries.

b. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J5—Number, by state or other area and age, December 2002

State or area	Total, all ages	17 or under	18-54	55-61	62-64	65-69	70-74	75-79	80-84	85-89	90-99	100 or older
All areas ^a	46,452,550	3,042,100	4,137,120	2,055,320	4,038,540	8,986,050	8,070,420	6,966,500	4,987,170	2,736,850	1,392,400	40,080
Alabama	856,990	73,410	102,900	52,920	79,130	160,400	135,980	111,680	76,570	41,930	21,570	500
Alaska	58,980	7,540	6,750	2,650	6,120	12,390	9,170	6,980	4,460	1,960	960	0
Arizona	834,520	54,440	70,000	34,410	77,650	167,050	148,960	125,140	89,190	45,830	21,260	590
Arkansas	528,840	41,230	59,000	32,450	50,200	99,110	83,650	71,150	49,820	27,600	14,140	490
California	4,304,080	274,730	355,310	169,470	343,700	853,690	765,000	663,830	485,940	258,730	130,080	3,600
Colorado	549,870	35,860	47,570	21,520	47,750	113,560	98,080	80,730	57,420	30,970	16,050	360
Connecticut	581,160	31,190	43,380	19,850	39,960	106,450	103,980	97,190	73,870	42,700	21,880	710
Delaware	140,960	9,000	12,480	5,930	13,080	28,420	25,470	21,010	14,350	7,560	3,540	120
District of Columbia	73,280	4,750	6,970	2,860	4,550	13,340	12,530	11,450	8,700	5,160	2,860	110
Florida	3,278,010	186,630	237,040	125,990	278,750	633,480	600,820	532,050	379,950	200,860	100,030	2,410
Georgia	1,146,950	96,140	124,480	65,930	110,730	229,080	186,700	145,970	102,530	56,190	28,380	820
Hawaii	193,220	11,200	12,610	5,750	14,930	37,310	36,860	33,450	22,710	12,140	6,040	220
Idaho	204,970	13,040	16,680	8,640	20,030	40,700	35,990	29,810	21,140	12,450	6,340	150
Illinois	1,862,070	116,090	149,890	69,430	151,690	359,720	324,260	289,100	213,010	123,520	63,510	1,850
Indiana	1,012,160	64,140	92,170	43,670	92,500	194,810	174,020	153,270	107,240	58,630	30,750	960
Iowa	542,290	24,170	41,490	18,210	44,780	102,250	96,340	86,640	66,000	39,510	22,200	700
Kansas	441,780	25,840	34,660	15,510	34,190	83,050	77,440	68,750	52,930	30,510	18,320	580
Kentucky	754,480	59,090	100,480	49,860	71,420	137,610	116,410	98,100	66,420	35,850	18,890	350
Louisiana	725,200	68,150	81,670	38,490	65,450	131,550	119,710	99,480	67,060	34,910	18,180	550
Maine	258,140	17,150	28,900	12,940	21,030	48,360	43,350	37,730	26,530	14,030	7,920	200
Maryland	743,760	52,150	58,230	27,660	61,600	149,010	133,210	114,790	82,190	42,420	21,770	730
Massachusetts	1,062,670	63,220	101,720	42,530	70,290	190,940	183,940	169,170	127,550	73,470	38,700	1,140
Michigan	1,677,280	111,790	156,820	74,840	155,330	313,880	284,050	252,980	180,790	97,860	47,330	1,610
Minnesota	755,250	36,700	58,950	24,630	66,380	148,720	132,340	116,810	86,760	54,290	28,690	980
Mississippi	531,390	56,780	71,260	34,780	48,010	93,900	78,840	64,920	44,950	23,940	13,380	630
Missouri	1,021,950	70,510	100,130	49,670	92,460	192,830	172,440	146,070	105,610	59,780	31,430	1,020
Montana	161,580	10,200	13,410	6,490	16,270	31,660	27,960	22,910	17,730	9,840	5,010	100
Nebraska	287,040	15,150	21,350	9,610	21,630	56,010	51,990	44,740	33,940	20,570	11,730	320
Nevada	314,120	19,730	23,190	14,200	33,480	72,440	59,810	44,550	28,170	13,370	5,070	110
New Hampshire	207,860	13,810	19,790	7,920	17,550	39,780	37,520	31,450	21,830	11,710	6,260	240
New Jersey	1,363,370	77,560	100,110	50,640	100,580	263,910	249,910	222,950	162,230	90,860	43,590	1,030
New Mexico	289,570	23,940	27,720	12,190	28,170	57,580	49,940	40,900	26,780	14,920	7,210	220
New York	3,024,130	188,280	263,400	134,430	246,130	571,740	526,160	463,270	334,540	191,220	101,690	3,270
North Carolina	1,406,150	98,360	145,520	81,490	132,030	278,440	234,790	195,690	133,920	70,530	34,330	1,050
North Dakota	113,960	4,740	7,820	3,430	9,500	21,360	20,530	18,550	13,970	8,810	5,090	160
Ohio	1,929,680	105,870	163,060	77,850	166,710	369,970	344,420	308,540	218,630	117,180	55,750	1,700
Oklahoma	605,840	39,810	52,930	29,190	58,520	120,150	105,310	86,990	60,710	33,370	18,320	540
Oregon	587,580	30,520	47,170	23,640	56,510	111,990	99,450	90,680	68,280	39,100	19,870	370
Pennsylvania	2,376,520	121,580	184,330	91,560	196,820	438,550	429,930	394,630	284,760	157,740	74,710	1,910
Rhode Island	191,490	11,110	18,020	8,550	13,650	32,120	31,570	31,950	24,040	13,720	6,580	180
South Carolina	718,990	57,670	78,230	44,170	71,060	140,150	117,130	95,900	64,980	33,290	15,890	520
South Dakota	137,630	8,180	10,520	4,380	10,660	25,910	24,620	20,860	16,490	10,040	5,760	210
Tennessee	1,028,360	76,500	111,960	59,170	101,490	200,030	168,520	137,580	94,900	51,680	25,730	800
Texas	2,730,970	205,410	231,970	115,520	249,690	567,370	483,670	391,840	268,160	141,210	74,210	1,920
Utah	250,840	19,920	19,630	8,250	21,260	52,110	44,500	36,940	26,650	14,430	7,050	100
Vermont	106,860	6,880	10,790	4,660	9,320	20,730	18,530	14,980	11,130	6,440	3,310	90
Virginia	1,072,310	72,740	101,940	51,640	98,570	216,180	185,390	152,740	107,390	57,120	27,740	860
Washington	874,040	48,090	73,860	35,640	79,100	173,860	149,780	130,560	100,020	53,750	28,620	760
West Virginia	398,700	26,040	49,480	28,280	38,760	71,670	63,060	54,910	36,470	20,240	9,520	270
Wisconsin	915,290	45,470	70,890	32,670	82,820	176,700	161,580	142,390	106,420	62,670	32,730	950
Wyoming	79,190	4,950	6,450	3,250	7,250	16,690	14,620	11,450	7,810	4,380	2,260	80
Outlying areas												
American Samoa	5,470	1,990	760	520	500	860	350	330	110	20	30	0
Guam	11,700	2,260	1,120	320	1,100	2,980	1,870	1,310	510	180	50	0
Northern Mariana Islands	1,770	490	200	60	210	410	240	80	50	30	0	0
Puerto Rico	688,140	77,460	96,060	57,040	73,890	120,840	94,660	73,100	51,020	28,710	15,000	360
Virgin Islands	14,560	1,400	990	720	1,800	3,590	2,430	1,770	1,030	470	350	10
Foreign countries	414,360	20,060	12,590	7,160	31,420	87,590	89,910	73,400	50,560	26,380	14,720	570

a. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2002

State or area	All races				Adult beneficiaries	
	Total ^a	White	Black	Other ^b	Men	Women
All areas ^c	46,452,550	39,417,390	4,784,360	2,098,030	18,272,420	24,264,430
Alabama	856,990	645,900	195,280	14,280	322,670	441,040
Alaska	58,980	45,320	2,090	11,380	24,750	25,680
Arizona	834,520	759,480	22,060	50,940	344,030	425,510
Arkansas	528,840	452,550	66,010	9,280	204,630	272,360
California	4,304,080	3,472,290	304,110	509,550	1,744,370	2,217,670
Colorado	549,870	506,430	19,280	22,140	221,890	284,810
Connecticut	581,160	523,900	37,900	16,690	226,720	313,080
Delaware	140,960	116,210	21,340	3,080	55,220	74,540
District of Columbia	73,280	18,390	51,860	2,630	27,730	39,160
Florida	3,278,010	2,846,330	311,820	107,970	1,349,160	1,701,100
Georgia	1,146,950	841,820	277,440	25,030	429,550	596,650
Hawaii	193,220	52,030	2,130	138,120	79,880	99,560
Idaho	204,970	198,060	450	5,740	85,200	103,770
Illinois	1,862,070	1,552,480	242,170	61,730	717,830	990,900
Indiana	1,012,160	919,870	75,000	14,750	388,140	539,270
Iowa	542,290	525,900	8,610	6,410	215,630	292,370
Kansas	441,780	409,300	21,640	9,560	171,330	237,300
Kentucky	754,480	695,080	45,220	12,370	297,020	379,990
Louisiana	725,200	507,980	199,710	15,490	278,300	358,410
Maine	258,140	250,180	800	6,110	104,080	131,540
Maryland	743,760	547,970	169,200	24,460	284,510	395,180
Massachusetts	1,062,670	976,960	42,210	37,770	408,880	570,470
Michigan	1,677,280	1,430,850	207,600	34,490	654,440	874,370
Minnesota	755,250	723,770	13,260	15,550	300,360	404,370
Mississippi	531,390	361,680	159,910	8,800	194,850	265,600
Missouri	1,021,950	913,690	91,450	14,470	397,800	534,080
Montana	161,580	154,370	340	6,340	67,570	81,100
Nebraska	287,040	271,440	9,120	5,840	112,030	155,190
Nevada	314,120	273,560	20,930	18,800	138,170	153,380
New Hampshire	207,860	201,970	1,080	4,120	82,740	107,670
New Jersey	1,363,370	1,147,580	153,330	57,370	520,870	742,440
New Mexico	289,570	252,570	5,190	30,820	118,730	141,670
New York	3,024,130	2,457,190	367,960	183,250	1,161,960	1,612,200
North Carolina	1,406,150	1,095,910	276,470	30,970	536,630	744,060
North Dakota	113,960	109,910	230	3,290	45,930	60,960
Ohio	1,929,680	1,710,540	184,450	28,350	755,080	1,027,150
Oklahoma	605,840	545,790	34,570	23,890	237,330	317,020
Oregon	587,580	561,590	7,410	16,860	242,390	306,030
Pennsylvania	2,376,520	2,146,570	180,640	43,460	916,950	1,293,930
Rhode Island	191,490	177,660	6,300	6,510	73,650	103,110
South Carolina	718,990	524,030	182,380	10,730	272,050	373,260
South Dakota	137,630	130,480	490	6,330	54,330	72,340
Tennessee	1,028,360	884,220	126,590	15,460	390,850	538,730
Texas	2,730,970	2,288,240	296,540	139,010	1,078,470	1,396,400
Utah	250,840	239,410	1,580	9,070	101,070	125,790
Vermont	106,860	103,880	440	1,880	42,950	54,690
Virginia	1,072,310	844,270	196,580	28,620	416,220	563,080
Washington	874,040	805,480	21,750	44,030	358,970	453,190
West Virginia	398,700	379,540	10,990	7,360	162,130	198,900
Wisconsin	915,290	863,860	34,520	13,970	367,510	484,380
Wyoming	79,190	76,420	340	2,160	33,920	39,120
Outlying areas						
American Samoa	5,470	380	20	5,070	1,590	1,860
Guam	11,700	1,320	300	9,950	4,690	4,570
Northern Mariana Islands	1,770	210	30	1,520	590	630
Puerto Rico	688,140	527,080	50,890	106,440	267,940	318,360
Virgin Islands	14,560	2,760	10,660	1,050	5,860	6,840
Foreign countries	414,360	341,630	13,110	56,200	172,290	216,610

a. Includes 152,770 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

c. Includes beneficiaries with unknown state code.

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

NOTE: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J6—Percentage distribution of monthly benefit for retired workers, by state or other area and monthly benefit, December 2002

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 500.00	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	1,200.00–1,299.99	1,300.00 or more	Average	Median
All areas ^a	29,203,660	100.0	14.1	10.0	8.6	8.1	8.9	10.3	11.3	9.0	7.0	12.6	895.00	902.70
Alabama	472,820	100.0	15.5	11.3	10.0	9.6	10.0	10.4	10.1	7.8	5.9	9.5	849.80	836.70
Alaska	34,430	100.0	17.2	10.5	9.4	8.9	8.6	8.3	9.6	8.0	6.4	13.2	867.80	841.70
Arizona	543,980	100.0	12.3	9.7	8.1	7.8	9.1	11.1	12.5	9.6	7.5	12.4	910.10	928.90
Arkansas	302,380	100.0	15.7	11.9	11.0	10.7	10.8	10.2	9.8	7.0	4.9	7.8	827.20	805.70
California	2,778,110	100.0	16.2	9.5	8.4	7.7	8.1	9.1	10.2	8.5	7.1	15.2	900.80	901.70
Colorado	348,260	100.0	17.0	9.8	8.5	8.0	8.2	9.6	10.5	9.2	6.6	12.4	872.80	883.70
Connecticut	405,620	100.0	9.0	8.2	7.7	7.2	8.1	10.4	11.9	10.7	8.5	18.3	981.30	994.70
Delaware	91,780	100.0	10.0	9.6	8.1	7.3	8.6	10.8	13.7	10.8	8.3	12.9	935.90	962.00
District of Columbia	47,980	100.0	31.0	11.3	9.7	8.6	7.0	7.2	5.2	4.5	3.6	11.9	757.60	681.20
Florida	2,222,990	100.0	13.6	10.4	8.7	8.5	9.3	10.7	11.5	8.9	6.6	11.8	891.10	893.70
Georgia	676,110	100.0	14.7	10.8	10.4	9.7	9.4	9.6	10.0	8.2	6.1	11.2	866.30	848.00
Hawaii	137,430	100.0	15.5	9.7	8.0	8.2	9.8	10.9	10.9	8.4	6.4	12.1	883.40	887.70
Idaho	131,560	100.0	14.4	10.1	8.6	8.4	10.2	11.5	11.9	8.8	6.9	9.3	873.00	884.70
Illinois	1,209,350	100.0	12.2	9.3	7.8	7.1	8.0	10.3	11.8	9.9	8.2	15.3	934.50	955.70
Indiana	641,590	100.0	9.2	9.6	7.6	7.3	9.2	12.2	13.5	10.7	8.4	12.4	937.40	959.00
Iowa	354,510	100.0	12.1	10.3	8.4	8.5	10.0	11.6	12.6	9.5	7.0	9.9	893.10	906.70
Kansas	288,040	100.0	11.5	9.8	8.4	8.4	9.3	11.0	11.9	9.8	7.1	12.8	917.10	924.70
Kentucky	394,930	100.0	16.7	11.0	9.7	9.3	9.5	10.4	10.8	8.1	5.9	8.7	842.30	835.00
Louisiana	370,860	100.0	20.2	11.2	9.2	8.3	8.4	8.9	10.3	7.3	6.0	10.1	830.10	813.70
Maine	156,590	100.0	17.6	11.3	9.9	10.1	10.1	10.5	10.3	7.2	5.1	8.0	823.70	812.70
Maryland	487,150	100.0	15.6	9.3	8.1	8.0	8.4	9.6	10.8	8.9	7.0	14.4	900.70	908.70
Massachusetts	695,490	100.0	15.1	10.1	8.7	7.9	8.3	9.4	10.3	8.6	6.9	14.6	899.60	898.70
Michigan	1,036,350	100.0	8.6	9.0	6.8	6.5	8.8	11.9	13.9	11.1	8.7	14.5	963.80	986.70
Minnesota	503,150	100.0	13.6	10.7	8.9	8.0	8.5	10.2	12.0	9.5	7.2	11.5	889.50	903.70
Mississippi	280,600	100.0	17.8	12.4	11.0	10.4	9.9	9.7	8.9	6.7	4.8	8.2	814.40	783.70
Missouri	629,860	100.0	13.7	10.3	9.0	8.4	9.5	10.6	12.0	8.9	7.0	10.7	883.50	890.70
Montana	101,850	100.0	14.7	10.6	9.1	8.6	10.1	11.1	12.0	9.1	6.4	8.4	861.80	873.00
Nebraska	188,370	100.0	13.6	10.3	9.6	9.4	9.8	10.6	11.1	8.7	6.6	10.2	877.40	873.70
Nevada	214,020	100.0	13.4	9.7	8.6	8.2	8.7	10.0	11.1	9.7	7.7	12.8	903.10	913.70
New Hampshire	137,330	100.0	11.2	9.7	8.8	8.9	9.5	10.9	11.1	9.7	7.2	13.0	914.60	919.70
New Jersey	936,650	100.0	9.2	8.7	7.5	7.0	7.8	9.2	11.4	10.4	9.0	19.9	988.50	1006.00
New Mexico	172,710	100.0	18.5	10.5	9.6	9.3	9.6	9.6	9.9	7.8	5.7	9.6	835.00	823.70
New York	1,975,090	100.0	11.3	9.1	7.9	7.6	8.6	10.3	11.7	9.7	7.6	16.2	948.70	955.70
North Carolina	873,480	100.0	12.3	10.5	10.5	10.7	11.0	10.8	10.7	8.1	5.7	9.6	868.70	854.70
North Dakota	70,750	100.0	17.0	11.1	10.5	9.6	10.0	9.9	10.0	7.8	5.6	8.6	834.40	819.70
Ohio	1,185,340	100.0	13.6	9.2	7.3	6.7	8.1	11.4	13.1	10.3	8.1	12.3	911.30	948.70
Oklahoma	371,420	100.0	15.6	10.6	9.4	9.3	10.0	10.6	11.1	8.0	5.9	9.5	856.30	852.70
Oregon	389,090	100.0	11.9	9.9	8.1	7.7	9.3	12.0	13.1	9.9	7.3	10.8	904.70	927.70
Pennsylvania	1,549,200	100.0	11.0	9.7	7.8	7.5	9.3	11.9	13.2	10.1	7.4	11.9	920.30	940.70
Rhode Island	129,110	100.0	12.6	10.2	9.4	8.4	10.7	11.1	10.4	8.8	6.5	12.0	894.80	888.70
South Carolina	431,300	100.0	13.0	10.7	10.3	10.3	10.8	10.7	10.4	8.2	5.7	10.0	867.50	854.70
South Dakota	87,270	100.0	17.9	11.7	9.5	9.9	10.3	10.5	10.0	7.7	5.5	7.0	822.10	809.70
Tennessee	600,670	100.0	13.9	11.0	10.1	9.9	10.0	10.4	10.6	8.0	6.0	10.2	865.60	851.70
Texas	1,637,500	100.0	17.0	10.3	9.1	8.3	8.5	9.2	10.3	8.0	6.3	12.9	871.30	861.70
Utah	162,740	100.0	15.1	10.4	7.9	6.8	7.6	9.2	11.8	9.4	8.5	13.3	899.60	927.70
Vermont	67,710	100.0	12.6	10.9	8.4	9.1	10.5	11.8	11.2	9.1	5.8	10.5	882.50	883.70
Virginia	665,380	100.0	15.2	10.4	9.5	9.1	9.3	9.8	10.4	8.1	6.3	12.1	874.90	864.70
Washington	573,430	100.0	11.2	9.4	7.7	7.4	8.4	10.7	12.8	10.6	8.3	13.6	931.90	957.00
West Virginia	202,840	100.0	12.8	9.6	8.3	8.4	10.5	12.4	13.3	9.5	6.8	8.5	882.40	905.70
Wisconsin	615,570	100.0	10.5	10.3	7.8	7.5	8.7	11.9	14.2	10.6	8.0	10.5	917.10	946.70
Wyoming	52,300	100.0	13.2	11.0	8.2	8.1	9.2	10.0	11.3	10.0	7.3	11.7	894.80	902.90
Outlying areas														
American Samoa	1,440	100.0	50.0	15.3	11.1	5.6	5.6	4.9	4.9	2.1	0	0.7	539.30	497.70
Guam	6,020	100.0	42.0	15.0	10.5	9.5	6.5	5.3	3.0	2.5	1.5	4.3	624.00	547.40
Northern Mariana Islands	830	100.0	62.7	18.1	4.8	2.4	4.8	0	1.2	0	3.6	2.4	469.70	439.00
Puerto Rico	310,030	100.0	41.6	17.0	12.5	9.0	6.2	4.6	3.1	2.1	1.4	2.3	592.40	545.70
Virgin Islands	9,230	100.0	23.7	14.7	10.8	10.7	8.2	8.9	6.2	4.7	3.9	8.1	766.40	705.70
Foreign countries	241,050	100.0	52.4	12.8	8.7	6.8	5.1	4.2	3.4	2.3	1.5	2.6	523.40	483.00

a. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J8—Percentage distribution of disabled workers, by state or other area and monthly benefit, December 2002

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 500.00	500.00–599.90	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00 or more	Average	Median
All areas ^a	5,535,860	100.0	15.3	13.1	12.8	11.3	9.6	8.0	6.7	5.4	5.0	12.7	834.10	776.00
Alabama	139,260	100.0	15.9	14.5	14.0	12.0	10.3	7.6	5.9	5.2	4.3	10.4	805.40	744.70
Alaska	8,110	100.0	16.5	14.3	14.5	11.7	8.1	8.3	4.2	4.2	3.9	14.2	817.80	740.00
Arizona	97,760	100.0	12.8	12.8	12.6	10.9	9.7	8.0	7.0	5.8	5.5	14.8	865.10	807.90
Arkansas	84,890	100.0	16.5	14.6	14.1	12.5	10.8	8.4	6.4	4.9	4.1	7.7	785.90	738.70
California	474,520	100.0	16.3	12.3	11.6	10.5	9.0	7.9	6.7	5.7	5.1	14.9	848.90	792.70
Colorado	64,170	100.0	15.0	13.2	13.3	11.8	10.1	8.0	7.0	5.8	4.7	11.1	825.30	770.00
Connecticut	56,890	100.0	13.1	12.5	12.4	12.1	9.5	7.7	7.1	5.6	5.1	14.9	863.60	798.70
Delaware	17,220	100.0	14.1	12.3	12.6	10.4	8.6	8.4	7.1	5.5	5.3	15.8	865.20	807.40
District of Columbia	8,840	100.0	16.6	14.1	15.6	11.8	11.3	8.8	6.2	4.2	3.3	8.0	777.10	733.90
Florida	336,340	100.0	14.5	13.3	12.8	11.4	9.9	8.3	6.9	5.5	5.0	12.5	837.60	783.00
Georgia	171,920	100.0	14.3	13.2	14.4	12.5	10.4	8.7	7.0	5.0	4.8	9.8	815.90	763.70
Hawaii	15,680	100.0	13.1	13.2	12.7	11.3	9.4	9.7	6.8	6.8	4.0	12.9	847.10	795.00
Idaho	23,300	100.0	16.2	14.6	12.6	10.6	8.8	8.0	6.6	5.8	4.9	12.0	822.60	760.90
Illinois	189,620	100.0	14.4	12.4	12.0	10.6	9.4	8.1	6.8	5.5	5.6	15.3	861.70	805.70
Indiana	119,440	100.0	15.7	13.4	11.7	11.0	9.3	7.7	6.7	5.4	5.3	13.8	841.30	780.00
Iowa	53,210	100.0	17.6	14.0	13.0	10.4	9.7	7.5	7.0	5.5	5.3	10.1	805.10	750.70
Kansas	45,290	100.0	16.4	14.6	12.5	11.7	9.3	8.0	6.9	5.4	4.6	10.6	809.90	751.70
Kentucky	135,740	100.0	17.7	12.9	12.4	10.9	9.1	7.4	6.3	5.4	5.0	12.8	822.00	762.70
Louisiana	97,970	100.0	17.4	12.1	12.4	10.6	9.3	7.0	6.4	5.3	5.7	13.8	834.40	777.00
Maine	38,580	100.0	18.7	14.8	14.4	12.9	11.1	6.8	6.4	4.4	3.6	6.9	761.10	712.00
Maryland	77,560	100.0	12.9	11.7	12.4	11.7	9.8	9.1	6.8	5.4	5.4	14.8	867.50	813.70
Massachusetts	133,310	100.0	14.0	14.1	13.8	12.6	10.2	8.0	6.5	5.1	4.7	11.0	821.90	761.00
Michigan	202,770	100.0	14.7	11.3	10.7	9.6	8.8	7.5	6.8	5.7	6.1	18.8	892.20	841.00
Minnesota	74,630	100.0	16.4	13.6	13.3	11.2	10.0	8.0	6.2	4.9	4.9	11.5	816.10	755.70
Mississippi	94,250	100.0	16.7	14.0	15.7	13.1	10.2	7.9	6.2	4.6	3.8	7.8	779.30	726.70
Missouri	137,200	100.0	15.9	14.1	13.1	11.5	9.5	8.2	6.5	5.1	4.8	11.2	815.20	754.70
Montana	18,290	100.0	17.2	13.6	12.3	10.7	9.8	8.3	6.5	5.1	5.8	10.9	813.50	761.70
Nebraska	28,230	100.0	17.4	15.4	14.6	11.1	8.2	7.8	7.2	5.1	4.6	8.6	787.20	717.00
Nevada	36,790	100.0	11.4	10.6	12.2	10.9	9.4	8.5	7.9	6.6	6.1	16.6	896.70	848.70
New Hampshire	25,450	100.0	13.1	13.1	14.1	12.0	10.3	9.1	6.2	5.3	5.1	11.5	837.80	781.70
New Jersey	134,980	100.0	11.9	11.2	11.7	10.6	9.4	8.3	7.1	5.9	5.4	18.5	902.50	850.00
New Mexico	35,460	100.0	16.2	15.1	13.3	11.3	10.5	7.7	6.5	5.4	4.4	9.6	799.20	746.00
New York	355,400	100.0	14.2	11.9	11.7	10.1	9.0	7.8	7.0	5.4	5.6	17.4	881.60	824.00
North Carolina	211,470	100.0	13.7	13.1	14.1	13.2	11.3	9.2	7.0	5.3	4.3	8.9	813.40	769.10
North Dakota	9,980	100.0	19.8	13.2	14.4	10.8	9.8	7.7	6.2	4.8	3.7	9.4	780.50	721.50
Ohio	209,210	100.0	18.2	13.4	11.8	10.0	8.6	7.4	6.5	5.5	5.4	13.1	823.90	764.00
Oklahoma	73,620	100.0	16.8	13.1	12.6	10.7	10.0	8.3	6.8	5.9	4.8	11.1	817.30	769.00
Oregon	65,490	100.0	16.3	13.9	11.8	11.0	9.0	8.2	6.4	5.3	5.4	12.6	827.70	772.00
Pennsylvania	242,990	100.0	14.9	12.3	12.3	10.7	8.9	8.4	7.1	6.1	5.6	13.7	851.00	799.00
Rhode Island	24,950	100.0	14.9	14.5	13.9	11.1	10.3	7.7	7.3	5.2	4.7	10.4	815.70	757.70
South Carolina	111,370	100.0	12.8	12.8	14.1	13.1	10.9	9.3	7.3	5.5	4.6	9.5	823.20	778.00
South Dakota	13,000	100.0	19.8	13.9	14.8	12.0	9.6	7.3	5.5	5.2	3.3	8.5	769.60	710.40
Tennessee	154,500	100.0	15.2	14.0	14.1	12.7	10.4	8.4	6.7	5.0	4.0	9.3	801.40	750.40
Texas	293,030	100.0	15.6	13.2	12.6	11.2	10.0	8.4	6.9	5.4	4.9	11.6	826.40	774.00
Utah	24,050	100.0	18.7	13.6	12.1	10.2	7.3	7.6	6.4	4.9	5.0	14.2	823.90	752.70
Vermont	13,780	100.0	15.7	14.4	12.9	12.9	10.2	9.0	6.0	5.7	3.9	9.3	801.40	749.70
Virginia	139,550	100.0	14.5	12.8	13.2	11.7	10.0	8.3	7.0	5.3	5.0	12.3	834.80	780.00
Washington	100,830	100.0	16.0	13.1	11.7	10.5	9.3	7.5	6.7	5.2	5.1	14.9	847.00	788.00
West Virginia	68,190	100.0	15.5	11.2	10.5	10.4	8.7	7.5	6.8	5.9	5.8	17.6	876.80	827.70
Wisconsin	91,260	100.0	16.5	13.2	12.4	11.0	9.2	7.8	6.6	5.8	4.8	12.7	828.40	771.40
Wyoming	8,560	100.0	18.5	13.7	11.0	10.2	7.4	6.2	6.8	6.4	6.5	13.4	838.40	766.70
Outlying areas														
American Samoa	1,210	100.0	38.0	14.0	9.1	9.9	9.1	9.9	4.1	2.5	1.7	1.7	621.50	584.70
Guam	960	100.0	25.0	15.6	13.5	6.3	10.4	8.3	4.2	3.1	5.2	8.3	741.00	674.90
Northern Mariana Islands	90	100.0	b	b	b	b	b	b	b	b	b	b	393.70	300.00
Puerto Rico	131,340	100.0	15.7	19.8	21.1	14.2	9.5	6.6	4.8	2.7	2.1	3.5	712.90	664.80
Virgin Islands	1,260	100.0	16.7	14.3	7.9	10.3	14.3	9.5	5.6	4.8	4.8	11.9	828.90	809.20
Foreign countries	11,820	100.0	28.1	11.5	11.3	10.7	9	6.6	5.8	5.3	3.9	7.8	718.30	686.40

a. Includes beneficiaries with unknown state code.

b. Base figure is too small to meet statistical standards for reliability of derived figures.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J9—Percentage distribution of nondisabled widow(ers), by state or other area and monthly benefit, December 2002

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 500.00	500.00–599.90	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00 or more	Average	Median
All areas ^a	4,563,660	100.0	12.4	6.9	9.7	12.1	14.1	14.7	11.2	7.1	4.7	7.0	861.40	864.70
Alabama	91,030	100.0	17.8	9.9	11.9	12.9	13.4	12.4	8.6	5.4	3.2	4.5	786.80	781.70
Alaska	4,310	100.0	19.5	6.3	8.8	12.5	12.3	16.0	11.6	6.0	3.0	3.9	804.20	819.70
Arizona	70,130	100.0	9.8	5.5	8.3	11.9	14.9	16.8	12.9	7.5	5.0	7.3	890.10	898.70
Arkansas	53,500	100.0	18.9	11.0	13.0	12.7	12.9	11.6	8.4	4.9	2.9	3.8	768.00	754.00
California	384,900	100.0	11.8	6.0	9.0	11.2	13.4	14.5	11.6	7.6	5.4	9.5	893.80	891.70
Colorado	52,560	100.0	12.2	6.5	9.8	11.9	13.1	15.1	11.7	7.4	4.7	7.6	869.00	874.40
Connecticut	47,560	100.0	6.0	3.8	7.1	11.2	14.7	16.0	13.5	10.0	7.4	10.3	955.60	941.90
Delaware	12,600	100.0	6.7	5.2	7.5	12.5	13.7	18.9	12.5	9.8	4.8	8.4	922.90	925.20
District of Columbia	6,920	100.0	31.6	13.3	9.1	12.1	8.7	8.4	5.3	3.0	1.9	6.5	710.10	649.00
Florida	282,340	100.0	9.5	6.3	9.6	13.0	14.8	15.4	11.5	7.2	4.7	8.1	888.40	880.70
Georgia	108,140	100.0	16.9	9.7	11.4	13.0	12.8	12.4	8.7	5.7	3.8	5.5	801.60	792.90
Hawaii	15,200	100.0	14.5	7.5	9.7	15.2	13.4	15.3	9.5	6.4	3.2	5.3	827.30	828.90
Idaho	18,480	100.0	8.3	7.5	9.7	12.5	16.3	16.8	12.6	6.5	4.3	5.4	871.80	875.00
Illinois	189,540	100.0	8.1	4.9	8.0	11.3	14.7	16.4	12.8	9.0	6.0	9.0	922.70	920.70
Indiana	101,160	100.0	5.9	4.8	7.7	12.1	16.2	19.0	13.6	8.5	5.5	6.8	917.60	918.70
Iowa	59,560	100.0	7.3	6.6	10.3	14.0	16.1	16.6	11.2	7.2	4.3	6.3	880.60	872.70
Kansas	45,160	100.0	7.0	6.6	9.5	12.3	14.2	15.5	12.0	8.1	6.1	8.7	915.10	902.90
Kentucky	84,370	100.0	18.9	9.9	11.5	12.2	13.3	13.1	8.7	5.2	3.4	3.8	778.50	780.00
Louisiana	97,120	100.0	18.2	9.4	11.8	12.9	12.6	12.2	9.4	5.1	3.4	5.0	790.20	781.70
Maine	24,040	100.0	13.7	8.2	12.1	14.4	14.5	12.8	10.0	5.4	4.1	4.8	818.30	812.90
Maryland	72,020	100.0	12.6	6.5	9.2	11.4	13.6	14.9	11.6	7.3	4.9	8.0	873.20	877.70
Massachusetts	93,520	100.0	11.4	5.6	9.1	11.6	14.1	14.6	11.5	7.9	5.3	8.8	892.50	888.40
Michigan	172,040	100.0	5.7	3.7	7.7	12.0	17.3	18.6	13.7	8.7	5.6	7.0	924.40	920.00
Minnesota	75,430	100.0	10.3	7.0	9.8	12.4	14.0	15.0	12.4	7.5	5.4	6.2	873.00	877.70
Mississippi	51,870	100.0	23.7	11.6	13.0	11.8	11.5	10.3	7.1	3.9	2.8	4.3	737.80	714.00
Missouri	98,000	100.0	11.0	7.1	10.5	13.1	14.5	14.7	11.4	7.1	4.4	6.1	858.90	858.70
Montana	15,850	100.0	9.6	8.1	10.9	14.4	15.3	14.9	10.8	6.0	3.8	6.1	856.10	849.70
Nebraska	29,340	100.0	8.2	7.3	11.3	13.6	14.8	14.3	10.8	7.3	4.0	8.4	884.60	863.40
Nevada	23,340	100.0	9.6	5.6	7.8	12.5	12.8	15.9	13.6	8.7	5.1	8.5	903.50	913.70
New Hampshire	16,770	100.0	7.0	5.1	9.0	12.1	13.8	18.4	12.3	9.1	5.1	8.1	912.40	916.00
New Jersey	122,320	100.0	6.1	4.4	7.7	11.0	14.3	16.0	13.9	9.6	6.9	10.2	949.60	940.70
New Mexico	27,210	100.0	18.1	8.7	11.3	11.9	13.2	12.1	9.4	6.5	4.1	4.7	799.90	799.70
New York	265,440	100.0	8.0	5.5	9.0	12.2	15.3	15.9	12.0	7.9	5.4	8.8	912.70	900.70
North Carolina	121,230	100.0	17.2	9.1	11.9	13.5	13.5	11.8	8.9	5.5	3.2	5.3	797.20	787.70
North Dakota	15,430	100.0	11.5	9.6	13.3	14.8	13.3	12.7	8.7	6.3	4.5	5.4	827.50	810.70
Ohio	230,470	100.0	9.6	5.2	8.1	11.0	15.3	17.1	13.3	8.4	5.3	6.9	894.10	905.70
Oklahoma	65,190	100.0	13.0	8.2	10.9	13.1	15.2	14.2	10.2	5.9	4.1	5.2	832.80	835.70
Oregon	53,160	100.0	7.0	5.0	8.9	12.4	16.0	17.0	13.7	7.7	5.0	7.4	906.20	905.70
Pennsylvania	259,820	100.0	6.5	4.8	9.3	12.6	16.4	17.6	13.4	8.1	4.8	6.6	905.00	903.70
Rhode Island	14,520	100.0	7.3	6.5	9.2	12.4	16.6	16.9	10.5	6.6	5.4	8.5	901.40	889.40
South Carolina	62,210	100.0	18.3	9.3	11.6	12.9	12.9	11.8	9.2	5.0	4.0	5.0	791.10	780.00
South Dakota	15,300	100.0	12.2	10.3	12.9	16.1	14.0	11.8	8.6	5.7	3.5	5.0	818.00	791.20
Tennessee	103,580	100.0	15.9	8.7	12.3	13.1	13.5	12.8	9.5	5.3	3.5	5.5	808.40	800.40
Texas	307,570	100.0	15.1	8.5	10.6	12.2	12.7	12.8	10.2	6.5	4.2	7.2	836.30	830.00
Utah	20,140	100.0	10.4	4.3	7.6	10.2	11.8	18.6	13.1	7.7	7.0	9.3	919.00	934.70
Vermont	9,330	100.0	10.9	8.5	10.1	11.1	15.4	14.5	11.7	6.3	4.9	6.5	862.00	863.70
Virginia	103,910	100.0	15.5	8.6	11.0	13.1	13.5	12.6	9.6	6.0	4.0	6.1	822.00	813.70
Washington	76,730	100.0	7.1	4.6	7.8	12.2	14.9	17.2	13.6	9.0	5.4	8.2	922.10	920.70
West Virginia	52,010	100.0	12.1	8.1	12.0	12.7	15.7	15.1	10.2	6.6	3.9	3.6	825.10	834.00
Wisconsin	87,870	100.0	6.3	5.1	8.8	12.6	15.7	18.3	13.7	7.9	5.0	6.6	906.20	908.70
Wyoming	6,570	100.0	7.8	7.8	9.4	12.0	13.2	18.1	11.7	9.9	3.0	7.0	887.70	891.70
Outlying areas														
American Samoa	320	100.0	b	b	b	b	b	b	b	b	b	b	472.90	368.50
Guam	900	100.0	37.8	13.3	16.7	11.1	5.6	5.6	4.4	2.2	2.2	1.1	616.10	590.70
Northern Mariana Islands	130	100.0	b	b	b	b	b	b	b	b	b	b	388.20	372.70
Puerto Rico	71,000	100.0	53.5	14.3	10.8	7.8	5.2	3.3	2.2	1.0	0.8	1.2	528.20	479.70
Virgin Islands	1,060	100.0	28.3	17.9	14.2	10.4	6.6	6.6	7.5	4.7	1.9	1.9	670.90	628.70
Foreign countries	72,960	100.0	43.6	14.5	12.1	9.4	7.3	4.8	3.2	1.9	1.3	2.0	573.20	545.00

a. Includes beneficiaries with unknown state code.

b. Base figure is too small to meet statistical standards for reliability of derived figures.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2002

State or area	Total	Children under age 18 of—				Disabled adult children of—				Students aged 18–19 of—			
		Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers
All areas ^a	3,915,520	3,041,690	269,590	1,427,420	1,344,680	748,660	193,150	60,760	494,750	125,170	14,640	44,910	65,620
Alabama	93,280	73,400	6,010	38,290	29,100	16,590	3,600	1,620	11,370	3,290	320	1,570	1,400
Alaska	8,550	7,530	800	2,620	4,110	760	200	50	510	260	40	40	180
Arizona	64,980	54,420	4,920	25,160	24,340	8,570	2,290	910	5,370	1,990	260	560	1,170
Arkansas	51,850	41,230	3,040	22,220	15,970	8,960	1,910	1,010	6,040	1,660	150	640	870
California	342,040	274,640	31,730	112,790	130,120	60,460	19,370	4,350	36,740	6,940	1,240	1,940	3,760
Colorado	43,170	35,870	2,810	15,840	17,220	5,990	1,730	570	3,690	1,310	130	410	770
Connecticut	41,360	31,180	2,740	15,130	13,310	9,380	2,640	500	6,240	800	180	250	370
Delaware	11,200	9,010	830	4,260	3,920	1,920	600	140	1,180	270	60	90	120
District of Columbia	6,390	4,750	500	1,060	3,190	1,470	200	60	1,210	170	10	30	130
Florida	227,750	186,570	21,120	82,720	82,720	32,730	9,020	2,800	20,910	8,450	1,240	2,720	4,490
Georgia	120,750	96,150	6,460	43,960	45,730	20,140	4,100	1,900	14,140	4,460	490	1,600	2,370
Hawaii	13,780	11,200	1,840	4,260	5,100	2,330	790	70	1,470	250	10	70	170
Idaho	16,000	13,040	850	6,010	6,180	2,420	650	130	1,640	540	80	190	270
Illinois	153,340	116,100	10,780	49,650	55,670	32,070	7,670	2,360	22,040	5,170	560	1,830	2,780
Indiana	84,750	64,120	4,550	31,870	27,700	17,190	3,970	1,500	11,720	3,440	330	1,310	1,800
Iowa	34,290	24,160	1,540	12,210	10,410	8,710	2,370	680	5,660	1,420	90	540	790
Kansas	33,150	25,810	1,670	12,270	11,870	6,090	1,610	410	4,070	1,250	120	510	620
Kentucky	77,470	59,060	3,350	35,730	19,980	15,780	3,390	2,110	10,280	2,630	320	1,350	960
Louisiana	88,490	68,130	5,690	31,690	30,750	17,450	3,960	1,720	11,770	2,910	230	1,190	1,490
Maine	22,520	17,170	1,150	10,920	5,100	4,520	1,190	420	2,910	830	50	470	310
Maryland	64,070	52,170	4,270	18,540	29,360	10,910	2,680	570	7,660	990	70	170	750
Massachusetts	83,320	63,240	4,740	35,950	22,550	18,180	5,080	1,390	11,710	1,900	210	880	810
Michigan	148,460	111,780	8,580	55,920	47,280	32,020	8,190	2,570	21,260	4,660	630	1,590	2,440
Minnesota	50,520	36,690	2,390	17,690	16,610	11,750	3,530	560	7,660	2,080	220	680	1,180
Mississippi	70,940	56,780	4,750	29,420	22,610	11,180	2,220	1,310	7,650	2,980	300	1,220	1,460
Missouri	90,070	70,520	4,620	35,640	30,260	15,910	3,930	1,380	10,600	3,640	270	1,420	1,950
Montana	12,910	10,200	990	4,490	4,720	2,080	580	200	1,300	630	50	250	330
Nebraska	19,820	15,140	910	7,220	7,010	3,960	1,320	240	2,400	720	80	210	430
Nevada	22,570	19,730	2,440	8,330	8,960	2,250	650	220	1,380	590	90	210	290
New Hampshire	17,450	13,810	840	7,790	5,180	3,080	770	230	2,080	560	80	200	280
New Jersey	100,060	77,530	7,120	34,520	35,890	19,580	5,590	1,120	12,870	2,950	420	910	1,620
New Mexico	29,170	23,930	2,310	9,860	11,760	4,130	1,260	330	2,540	1,110	130	340	640
New York	249,970	188,260	19,850	95,690	72,720	56,250	14,890	3,730	37,630	5,460	860	1,960	2,640
North Carolina	125,460	98,330	5,860	50,830	41,640	23,160	5,000	2,590	15,570	3,970	280	1,720	1,970
North Dakota	7,070	4,760	340	2,400	2,020	2,020	490	90	1,440	290	30	110	150
Ohio	147,450	105,880	8,120	50,690	47,070	35,990	9,240	2,570	24,180	5,580	600	2,090	2,890
Oklahoma	51,490	39,800	3,280	16,660	19,860	9,260	2,060	840	6,360	2,430	170	820	1,440
Oregon	39,160	30,530	3,120	13,200	14,210	7,240	2,070	590	4,580	1,390	130	380	880
Pennsylvania	165,640	121,540	9,020	59,440	53,080	39,070	9,690	3,100	26,280	5,030	510	1,910	2,610
Rhode Island	14,730	11,100	780	6,510	3,810	3,340	750	290	2,300	290	30	80	180
South Carolina	73,680	57,660	3,350	29,140	25,170	13,380	2,870	1,150	9,360	2,640	180	1,030	1,430
South Dakota	10,960	8,170	550	3,560	4,060	2,240	500	120	1,620	550	50	180	320
Tennessee	98,780	76,500	5,400	37,650	33,450	18,790	3,990	1,820	12,980	3,490	340	1,450	1,700
Texas	256,100	205,400	20,300	78,880	106,220	40,100	10,690	3,070	26,340	10,600	1,350	3,130	6,120
Utah	23,980	19,930	1,600	7,600	10,730	3,230	1,190	200	1,840	820	80	220	520
Vermont	9,220	6,890	620	3,780	2,490	1,920	480	270	1,170	410	40	220	150
Virginia	93,010	72,700	5,350	36,400	30,950	17,530	3,960	1,450	12,120	2,780	340	1,130	1,310
Washington	61,880	48,070	4,310	21,290	22,470	11,500	3,420	860	7,220	2,310	350	740	1,220
West Virginia	37,670	26,020	1,970	15,500	8,550	10,370	1,900	1,130	7,340	1,280	70	650	560
Wisconsin	63,400	45,470	3,030	22,400	20,040	15,460	4,190	1,080	10,190	2,470	320	920	1,230
Wyoming	6,150	4,950	290	2,210	2,450	880	210	130	540	320	40	80	200
Outlying areas													
American Samoa	2,020	1,990	320	770	900	20	0	0	20	10	0	0	10
Guam	2,440	2,260	580	440	1,240	100	30	20	50	80	20	20	40
Northern Mariana Islands	550	490	250	30	210	60	20	0	40	0	0	0	0
Puerto Rico	101,840	77,420	8,570	44,390	24,460	22,800	6,820	2,160	13,820	1,620	250	650	720
Virgin Islands	1,860	1,400	320	470	610	380	160	0	220	80	10	10	60
Foreign countries	25,460	20,120	5,960	3,170	10,990	4,960	1,450	40	3,470	380	120	0	260

a. Includes beneficiaries with unknown state code.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2002

Region and country ^a	Number						Total monthly benefits (thousands of dollars)	
	All beneficiaries	Retired workers	Disabled workers	Widow(er)s ^b	Wives and husbands	Children	All beneficiaries	Retired workers
All countries	415,179	242,128	12,266	77,159	59,036	24,590	203,428	127,212
Canada	94,693	54,488	2,528	17,612	17,467	2,598	39,887	24,537
Mexico	49,105	23,782	1,409	12,201	5,784	5,929	23,195	12,322
Central America and Caribbean	20,636	14,099	1,087	1,993	1,321	2,136	12,755	9,272
Barbados	1,048	850	27	93	62	16	736	608
Costa Rica	3,020	2,010	194	296	199	321	2,082	1,488
Dominican Republic	5,763	3,639	429	416	345	934	3,155	2,152
El Salvador	821	555	52	76	53	85	457	318
Guatemala	1,142	732	57	132	73	148	665	450
Honduras	937	568	62	91	55	161	612	409
Jamaica	2,711	2,124	61	232	194	100	1,694	1,382
Panama	880	534	54	147	60	85	554	354
Trinidad and Tobago	855	663	24	81	53	34	590	468
South America	13,065	8,677	491	1,888	1,175	834	7,859	5,473
Argentina	2,866	1,794	54	510	394	114	1,656	1,115
Brazil	1,757	1,022	54	366	183	132	1,118	685
Chile	1,133	736	39	180	98	80	749	515
Colombia	2,692	1,904	141	304	146	197	1,590	1,153
Ecuador	2,187	1,592	107	203	132	153	1,267	949
Peru	755	501	33	107	64	50	474	333
Uruguay	635	463	31	60	66	15	353	269
Africa	1,566	890	109	201	99	267	970	619
Asia	41,076	19,983	1,314	9,377	4,946	5,456	23,375	13,337
Cyprus	527	302	21	109	57	38	291	183
Hong Kong	830	398	10	314	76	32	464	248
India	691	455	43	54	68	71	435	296
Israel	8,326	4,677	204	1,304	1,278	863	5,096	3,333
Japan	6,527	3,176	42	1,744	1,309	256	4,225	2,376
Philippines	18,408	8,070	608	5,273	1,743	2,714	9,538	4,856
Thailand	1,004	720	79	43	29	133	775	581
Turkey	633	389	32	117	63	32	407	265
Yemen	1,589	419	110	128	89	843	656	273
Europe	189,007	116,406	5,183	32,979	27,496	6,943	91,530	58,980
Austria	2,252	1,463	79	387	268	55	1,118	747
Belgium	1,610	1,012	15	263	265	55	804	535
Croatia	1,452	789	151	299	108	105	966	552
Denmark	876	530	12	188	102	44	575	359
Finland	745	485	28	129	76	27	422	270
France	9,728	6,318	94	1,450	1,580	286	4,932	3,446
Germany	29,500	18,141	827	4,806	4,351	1,375	12,717	7,743
Greece	22,235	12,767	738	4,443	3,463	824	10,598	6,544
Hungary	1,771	1,330	102	188	90	61	1,354	1,061
Ireland	7,893	5,356	214	1,064	897	362	4,461	3,240
Italy	34,651	20,211	813	7,771	4,797	1,059	16,697	10,304
Malta	595	308	32	140	66	49	376	211
Netherlands	3,999	2,497	67	597	697	141	1,743	1,130
Norway	6,130	3,583	132	1,166	1,078	171	2,381	1,429
Poland	4,134	2,718	215	676	354	171	2,257	1,465
Portugal	11,858	7,927	683	1,548	1,272	428	5,753	3,984
Serbia	971	535	68	252	77	39	618	328
Spain	9,217	5,404	244	1,849	1,410	310	4,797	3,038
Sweden	2,950	1,951	53	411	439	96	1,291	851
Switzerland	5,693	3,862	43	629	1,017	142	2,221	1,559
United Kingdom	27,854	17,311	445	4,267	4,795	1,036	13,551	8,862
Oceania	6,031	3,803	145	908	748	427	3,857	2,673
Australia	4,849	3,079	90	787	655	238	3,093	2,140
New Zealand	804	541	30	78	70	85	546	405

a. Countries with 500 or more beneficiaries are shown separately. The total and continent subtotals include all foreign residents.

b. Includes nondisabled and disabled widow(er)s, widowed mothers and fathers, and parents.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J12—Number of disabled workers, by state or other area and diagnostic group, December 2002

State or area	Total	Endocrine, nutritional, and metabolic	Infectious and parasitic diseases ^a	Injuries	Mental disorders		Neoplasms	Diseases of the—				Other	Unknown
					Retardation	Other		Circulatory system	Musculo-skeletal system	Nervous system and sense organs	Respiratory system		
All areas	5,539,597	237,020	102,589	248,544	286,210	1,558,928	150,138	558,736	1,324,762	533,774	176,941	219,851	142,104
Alabama	139,276	6,427	1,559	6,993	7,087	32,493	3,302	16,597	39,467	11,798	4,938	5,633	2,982
Alaska	8,197	266	91	465	416	2,460	250	626	1,975	942	228	311	167
Arizona	97,886	3,570	1,602	4,676	3,035	32,083	2,460	8,003	23,618	9,852	2,978	3,911	2,098
Arkansas	85,310	3,736	1,048	4,367	4,697	15,354	2,416	10,743	26,694	8,064	3,272	3,268	1,651
California	470,665	17,443	13,892	22,055	12,988	154,758	13,062	38,454	113,187	46,701	9,904	20,932	7,289
Colorado	63,770	2,067	1,228	3,413	3,042	16,422	1,801	4,054	16,871	8,405	2,275	2,424	1,768
Connecticut	58,123	2,260	1,124	2,017	3,121	20,189	1,649	5,004	11,249	5,744	1,591	2,121	2,054
Delaware	16,492	793	420	714	930	4,325	484	1,565	4,008	1,670	544	753	286
District of Columbia	8,608	344	666	230	550	2,749	167	804	1,322	883	197	536	160
Florida	339,296	15,309	11,076	19,310	11,341	92,170	9,791	37,534	75,726	27,255	10,944	15,300	13,540
Georgia	171,333	8,669	4,212	7,392	9,838	41,294	4,656	19,861	40,174	14,206	6,219	7,845	6,967
Hawaii	15,844	558	346	713	620	5,861	490	1,836	2,745	1,342	352	809	172
Idaho	23,513	961	206	1,289	1,187	6,881	666	1,816	5,966	2,577	755	800	409
Illinois	191,744	9,150	3,339	7,701	12,080	61,728	5,623	19,501	35,395	20,103	6,124	7,794	3,206
Indiana	120,126	6,754	1,501	4,571	9,399	31,017	3,458	13,180	24,288	12,981	5,075	4,677	3,225
Iowa	51,446	2,278	420	2,218	4,727	14,178	1,488	4,154	11,465	5,907	1,828	1,781	1,002
Kansas	45,339	2,426	523	2,384	3,481	12,079	1,240	3,991	9,587	5,027	1,703	1,668	1,230
Kentucky	137,541	5,324	1,181	5,303	8,542	37,250	2,929	14,473	38,250	9,982	5,834	3,955	4,518
Louisiana	98,302	4,102	1,779	4,886	5,940	17,658	2,501	12,920	29,102	8,503	2,701	4,324	3,886
Maine	38,926	1,328	296	1,642	2,170	13,222	899	3,259	9,973	3,420	1,162	1,095	460
Maryland	76,354	3,379	2,267	3,396	4,275	19,542	2,532	8,883	15,119	8,556	2,455	4,116	1,834
Massachusetts	132,229	3,792	2,761	4,900	5,910	52,125	3,420	9,608	27,707	12,299	3,372	4,246	2,089
Michigan	203,632	9,069	2,035	7,934	10,524	66,697	5,437	20,161	44,641	20,176	6,199	7,412	3,347
Minnesota	75,509	2,222	846	3,385	5,786	28,443	2,138	5,460	13,325	8,633	1,727	2,375	1,169
Mississippi	93,231	4,700	1,152	4,207	5,493	23,399	2,405	12,530	20,755	7,659	3,027	3,749	4,155
Missouri	135,948	7,126	1,846	6,783	8,740	32,292	3,466	13,698	34,680	13,210	5,449	5,218	3,440
Montana	18,077	577	159	1,100	863	4,487	414	1,299	5,122	2,264	684	599	509
Nebraska	27,999	1,318	321	1,511	1,742	6,815	792	2,617	6,801	3,503	1,016	1,044	519
Nevada	37,072	1,406	744	1,755	943	9,769	1,006	3,845	9,821	3,777	1,437	1,596	973
New Hampshire	25,971	729	184	1,064	1,220	9,574	662	2,155	5,789	2,712	821	743	318
New Jersey	133,918	5,008	3,002	5,452	5,161	40,272	4,537	14,887	28,511	14,548	3,953	6,145	2,442
New Mexico	35,601	1,421	535	2,160	1,337	8,866	764	2,542	10,750	3,789	1,140	1,580	717
New York	359,653	13,309	10,058	14,558	15,087	90,430	10,411	35,642	103,200	32,924	10,746	13,196	10,092
North Carolina	213,194	11,328	3,670	8,621	15,085	46,074	5,930	26,147	51,894	17,849	8,017	9,114	9,465
North Dakota	9,654	300	74	520	853	2,500	295	880	2,224	1,226	306	335	141
Ohio	208,282	9,142	2,137	6,872	16,812	72,708	5,070	19,318	35,460	18,813	6,954	6,745	8,251
Oklahoma	72,737	3,628	901	3,380	3,948	17,096	2,001	8,388	19,676	7,317	2,950	2,752	700
Oregon	63,547	2,465	934	3,522	3,268	17,907	1,748	5,031	15,407	8,051	1,819	2,345	1,050
Pennsylvania	241,917	11,078	3,531	11,193	14,345	60,367	7,006	26,540	60,918	25,089	7,627	9,632	4,591
Rhode Island	25,225	943	337	892	1,581	8,789	671	2,076	5,493	2,275	736	840	592
South Carolina	112,264	4,964	1,624	5,183	6,052	28,938	2,915	14,374	27,197	9,357	4,347	5,112	2,201
South Dakota	12,754	392	137	496	1,031	3,184	300	1,141	3,237	1,770	458	428	180
Tennessee	155,631	6,652	1,844	6,102	9,161	43,778	3,972	17,669	36,814	12,653	6,229	5,854	4,903
Texas	296,565	16,383	7,491	14,704	11,375	67,242	8,942	33,449	74,426	32,749	8,717	14,656	6,431
Utah	24,186	972	246	1,083	1,522	7,555	609	1,620	5,143	3,126	777	911	622
Vermont	13,543	585	170	624	741	4,352	358	1,070	3,070	1,311	415	409	438
Virginia	139,695	6,363	2,290	5,975	9,686	32,573	4,010	15,478	36,030	12,633	5,056	6,160	3,441
Washington	101,078	3,891	1,716	4,479	4,779	34,182	2,941	7,365	21,888	10,944	2,845	3,910	2,138
West Virginia	67,905	3,190	470	3,669	5,221	14,010	1,448	7,999	19,065	4,817	3,102	1,869	3,045
Wisconsin	91,892	3,960	972	3,974	6,488	29,220	2,522	7,280	18,819	11,001	2,383	3,222	2,051
Wyoming	8,379	323	87	503	479	2,150	193	667	2,129	1,038	402	279	129
Outlying areas													
Puerto Rico	128,630	2,202	1,353	5,326	1,276	55,548	1,483	8,635	34,471	10,708	2,845	2,732	2,051
Other ^b	15,588	438	186	882	235	3,873	408	1,907	4,118	1,635	306	590	1,010

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, these records were included in the Other group.

b. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, foreign countries, and unknown state code.

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

CONTACT: Linda Martin (410) 965-2535.

Table 5.J13—Percentage distribution of disabled workers, by state or other area and diagnostic group, December 2002

State or area	Total		Endocrine, nutritional, and metabolic	Infectious and parasitic diseases ^a	Injuries	Mental disorders		Neoplasms	Diseases of the—				Other	Unknown
						Retardation	Other		Circulatory system	Musculo-skeletal system	Nervous system and sense organs	Respiratory system		
	Number	Percent												
All areas	5,539,597	100.0	4.3	1.9	4.5	5.2	28.1	2.7	10.1	23.9	9.6	3.2	4.0	2.6
Alabama	139,276	100.0	4.6	1.1	5.0	5.1	23.3	2.4	11.9	28.3	8.5	3.5	4.0	2.1
Alaska	8,197	100.0	3.2	1.1	5.7	5.1	30.0	3.0	7.6	24.1	11.5	2.8	3.8	2.0
Arizona	97,886	100.0	3.6	1.6	4.8	3.1	32.8	2.5	8.2	24.1	10.1	3.0	4.0	2.1
Arkansas	85,310	100.0	4.4	1.2	5.1	5.5	18.0	2.8	12.6	31.3	9.5	3.8	3.8	1.9
California	470,665	100.0	3.7	3.0	4.7	2.8	32.9	2.8	8.2	24.0	9.9	2.1	4.4	1.5
Colorado	63,770	100.0	3.2	1.9	5.4	4.8	25.8	2.8	6.4	26.5	13.2	3.6	3.8	2.8
Connecticut	58,123	100.0	3.9	1.9	3.5	5.4	34.7	2.8	8.6	19.4	9.9	2.7	3.6	3.5
Delaware	16,492	100.0	4.8	2.5	4.3	5.6	26.2	2.9	9.5	24.3	10.1	3.3	4.6	1.7
District of Columbia	8,608	100.0	4.0	7.7	2.7	6.4	31.9	1.9	9.3	15.4	10.3	2.3	6.2	1.9
Florida	339,296	100.0	4.5	3.3	5.7	3.3	27.2	2.9	11.1	22.3	8.0	3.2	4.5	4.0
Georgia	171,333	100.0	5.1	2.5	4.3	5.7	24.1	2.7	11.6	23.4	8.3	3.6	4.6	4.1
Hawaii	15,844	100.0	3.5	2.2	4.5	3.9	37.0	3.1	11.6	17.3	8.5	2.2	5.1	1.1
Idaho	23,513	100.0	4.1	0.9	5.5	5.0	29.3	2.8	7.7	25.4	11.0	3.2	3.4	1.7
Illinois	191,744	100.0	4.8	1.7	4.0	6.3	32.2	2.9	10.2	18.5	10.5	3.2	4.1	1.7
Indiana	120,126	100.0	5.6	1.2	3.8	7.8	25.8	2.9	11.0	20.2	10.8	4.2	3.9	2.7
Iowa	51,446	100.0	4.4	0.8	4.3	9.2	27.6	2.9	8.1	22.3	11.5	3.6	3.5	1.9
Kansas	45,339	100.0	5.4	1.2	5.3	7.7	26.6	2.7	8.8	21.1	11.1	3.8	3.7	2.7
Kentucky	137,541	100.0	3.9	0.9	3.9	6.2	27.1	2.1	10.5	27.8	7.3	4.2	2.9	3.3
Louisiana	98,302	100.0	4.2	1.8	5.0	6.0	18.0	2.5	13.1	29.6	8.6	2.7	4.4	4.0
Maine	38,926	100.0	3.4	0.8	4.2	5.6	34.0	2.3	8.4	25.6	8.8	3.0	2.8	1.2
Maryland	76,354	100.0	4.4	3.0	4.4	5.6	25.6	3.3	11.6	19.8	11.2	3.2	5.4	2.4
Massachusetts	132,229	100.0	2.9	2.1	3.7	4.5	39.4	2.6	7.3	21.0	9.3	2.6	3.2	1.6
Michigan	203,632	100.0	4.5	1.0	3.9	5.2	32.8	2.7	9.9	21.9	9.9	3.0	3.6	1.6
Minnesota	75,509	100.0	2.9	1.1	4.5	7.7	37.7	2.8	7.2	17.6	11.4	2.3	3.1	1.5
Mississippi	93,231	100.0	5.0	1.2	4.5	5.9	25.1	2.6	13.4	22.3	8.2	3.2	4.0	4.5
Missouri	135,948	100.0	5.2	1.4	5.0	6.4	23.8	2.5	10.1	25.5	9.7	4.0	3.8	2.5
Montana	18,077	100.0	3.2	0.9	6.1	4.8	24.8	2.3	7.2	28.3	12.5	3.8	3.3	2.8
Nebraska	27,999	100.0	4.7	1.1	5.4	6.2	24.3	2.8	9.3	24.3	12.5	3.6	3.7	1.9
Nevada	37,072	100.0	3.8	2.0	4.7	2.5	26.4	2.7	10.4	26.5	10.2	3.9	4.3	2.6
New Hampshire	25,971	100.0	2.8	0.7	4.1	4.7	36.9	2.5	8.3	22.3	10.4	3.2	2.9	1.2
New Jersey	133,918	100.0	3.7	2.2	4.1	3.9	30.1	3.4	11.1	21.3	10.9	3.0	4.6	1.8
New Mexico	35,601	100.0	4.0	1.5	6.1	3.8	24.9	2.1	7.1	30.2	10.6	3.2	4.4	2.0
New York	359,653	100.0	3.7	2.8	4.0	4.2	25.1	2.9	9.9	28.7	9.2	3.0	3.7	2.8
North Carolina	213,194	100.0	5.3	1.7	4.0	7.1	21.6	2.8	12.3	24.3	8.4	3.8	4.3	4.4
North Dakota	9,654	100.0	3.1	0.8	5.4	8.8	25.9	3.1	9.1	23.0	12.7	3.2	3.5	1.5
Ohio	208,282	100.0	4.4	1.0	3.3	8.1	34.9	2.4	9.3	17.0	9.0	3.3	3.2	4.0
Oklahoma	72,737	100.0	5.0	1.2	4.6	5.4	23.5	2.8	11.5	27.1	10.1	4.1	3.8	1.0
Oregon	63,547	100.0	3.9	1.5	5.5	5.1	28.2	2.8	7.9	24.2	12.7	2.9	3.7	1.7
Pennsylvania	241,917	100.0	4.6	1.5	4.6	5.9	25.0	2.9	11.0	25.2	10.4	3.2	4.0	1.9
Rhode Island	25,225	100.0	3.7	1.3	3.5	6.3	34.8	2.7	8.2	21.8	9.0	2.9	3.3	2.3
South Carolina	112,264	100.0	4.4	1.4	4.6	5.4	25.8	2.6	12.8	24.2	8.3	3.9	4.6	2.0
South Dakota	12,754	100.0	3.1	1.1	3.9	8.1	25.0	2.4	8.9	25.4	13.9	3.6	3.4	1.4
Tennessee	155,631	100.0	4.3	1.2	3.9	5.9	28.1	2.6	11.4	23.7	8.1	4.0	3.8	3.2
Texas	296,565	100.0	5.5	2.5	5.0	3.8	22.7	3.0	11.3	25.1	11.0	2.9	4.9	2.2
Utah	24,186	100.0	4.0	1.0	4.5	6.3	31.2	2.5	6.7	21.3	12.9	3.2	3.8	2.6
Vermont	13,543	100.0	4.3	1.3	4.6	5.5	32.1	2.6	7.9	22.7	9.7	3.1	3.0	3.2
Virginia	139,695	100.0	4.6	1.6	4.3	6.9	23.3	2.9	11.1	25.8	9.0	3.6	4.4	2.5
Washington	101,078	100.0	3.8	1.7	4.4	4.7	33.8	2.9	7.3	21.7	10.8	2.8	3.9	2.1
West Virginia	67,905	100.0	4.7	0.7	5.4	7.7	20.6	2.1	11.8	28.1	7.1	4.6	2.8	4.5
Wisconsin	91,892	100.0	4.3	1.1	4.3	7.1	31.8	2.7	7.9	20.5	12.0	2.6	3.5	2.2
Wyoming	8,379	100.0	3.9	1.0	6.0	5.7	25.7	2.3	8.0	25.4	12.4	4.8	3.3	1.5
Outlying areas														
Puerto Rico	128,630	100.0	1.7	1.1	4.1	1.0	43.2	1.2	6.7	26.8	8.3	2.2	2.1	1.6
Other ^b	15,588	100.0	2.8	1.2	5.7	1.5	24.8	2.6	12.2	26.4	10.5	2.0	3.8	6.5

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, these records were included in the Other group.

b. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, foreign countries, and unknown state code.

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

CONTACT: Linda Martin (410) 965-2535.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J14—Number, average monthly benefit, and median monthly benefit, by state or other area and type of disabled beneficiary, December 2002

State or area	All disabled beneficiaries			Disabled workers			Disabled adult children			Disabled widow(er)s		
	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)
All areas ^a	6,490,390	792.40	733.70	5,535,860	834.10	776.00	748,660	551.00	541.00	205,870	546.20	524.70
Alabama	161,910	763.40	705.70	139,260	805.40	744.70	16,590	494.00	467.00	6,060	537.20	520.00
Alaska	9,080	791.20	719.70	8,110	817.80	740.00	760	562.20	550.50	210	594.40	572.00
Arizona	109,510	833.80	777.30	97,760	865.20	807.90	8,570	569.80	567.00	3,180	582.40	579.50
Arkansas	97,550	746.00	697.70	84,890	786.00	738.70	8,960	480.60	455.40	3,700	472.20	469.50
California	548,280	812.00	752.70	474,520	849.00	792.70	60,460	572.20	567.00	13,300	588.00	552.50
Colorado	72,070	796.20	739.70	64,170	825.40	770.00	5,990	569.00	577.00	1,910	528.40	502.00
Connecticut	68,000	822.00	759.00	56,890	863.60	798.70	9,380	615.80	625.50	1,730	574.80	541.00
Delaware	19,600	831.00	763.40	17,220	865.20	807.40	1,920	595.80	589.20	460	531.40	550.50
District of Columbia	10,570	731.40	684.70	8,840	777.20	733.90	1,470	494.40	460.70	260	515.00	519.50
Florida	379,870	803.80	747.70	336,340	837.60	783.00	32,730	549.00	540.00	10,800	521.80	493.00
Georgia	199,160	774.20	724.70	171,920	815.80	763.70	20,140	515.80	491.00	7,100	498.40	456.50
Hawaii	18,410	803.60	744.00	15,680	847.00	795.00	2,330	544.00	548.70	400	608.40	578.00
Idaho	26,430	793.20	733.00	23,300	822.60	760.90	2,420	562.40	546.40	710	614.00	614.00
Illinois	229,380	815.80	757.00	189,620	861.60	805.70	32,070	599.80	604.00	7,690	583.60	577.00
Indiana	141,420	802.20	741.70	119,440	841.40	780.00	17,190	594.20	602.70	4,790	574.80	571.00
Iowa	63,650	766.00	707.00	53,210	805.20	750.70	8,710	571.40	557.00	1,730	540.40	527.00
Kansas	52,920	774.60	714.70	45,290	809.80	751.70	6,090	572.20	556.70	1,540	540.40	536.50
Kentucky	158,190	777.80	717.70	135,740	822.00	762.70	15,780	490.40	457.00	6,670	558.20	544.00
Louisiana	121,010	773.60	713.70	97,970	834.40	777.00	17,450	494.40	459.00	5,590	581.20	547.00
Maine	44,220	730.60	686.40	38,580	761.00	712.00	4,520	523.80	517.00	1,120	514.20	504.00
Maryland	90,880	826.20	769.00	77,560	867.60	813.70	10,910	586.80	568.00	2,410	576.00	570.00
Massachusetts	155,120	784.40	727.00	133,310	822.00	761.00	18,180	564.00	561.00	3,630	511.40	490.00
Michigan	243,050	846.20	786.70	202,770	892.20	841.00	32,020	617.80	635.90	8,260	601.40	589.00
Minnesota	88,210	777.20	716.70	74,630	816.20	755.70	11,750	566.00	567.00	1,830	546.80	531.00
Mississippi	110,030	734.80	689.00	94,250	779.20	726.70	11,180	456.00	430.50	4,600	499.60	471.50
Missouri	158,550	779.40	720.70	137,200	815.20	754.70	15,910	552.80	542.00	5,440	542.40	514.00
Montana	20,970	777.20	723.00	18,290	813.40	761.70	2,080	532.20	535.50	600	522.40	489.00
Nebraska	32,910	752.60	688.00	28,230	787.20	717.00	3,960	548.40	535.00	720	521.00	513.00
Nevada	40,040	873.60	827.90	36,790	896.80	848.70	2,250	613.00	621.00	1,000	607.40	590.00
New Hampshire	29,180	804.60	746.70	25,450	837.80	781.70	3,080	589.00	574.40	650	529.60	483.00
New Jersey	158,710	858.80	799.00	134,980	902.60	850.00	19,580	619.80	626.00	4,150	560.40	517.70
New Mexico	40,710	760.60	711.70	35,460	799.20	746.00	4,130	480.20	453.70	1,120	569.80	561.00
New York	424,050	833.80	766.00	355,400	881.60	824.00	56,250	595.60	599.00	12,400	545.20	525.40
North Carolina	242,830	771.60	729.70	211,470	813.40	769.10	23,160	505.00	486.00	8,200	446.80	419.50
North Dakota	12,320	730.00	661.90	9,980	780.40	721.50	2,020	516.20	486.00	320	505.40	514.50
Ohio	254,030	781.80	718.70	209,210	824.00	764.00	35,990	581.80	580.00	8,830	599.60	597.00
Oklahoma	85,740	777.20	723.70	73,620	817.20	769.00	9,260	531.20	518.40	2,860	544.60	526.50
Oregon	74,890	798.80	740.00	65,490	827.60	772.00	7,240	601.40	600.90	2,160	587.80	589.50
Pennsylvania	291,630	806.20	746.00	242,990	851.00	799.00	39,070	582.00	585.00	9,570	582.60	585.00
Rhode Island	29,010	782.20	723.00	24,950	815.80	757.70	3,340	577.60	588.00	720	569.80	558.50
South Carolina	129,490	776.80	734.00	111,370	823.20	778.00	13,380	497.60	474.40	4,740	472.20	446.90
South Dakota	15,620	729.00	679.00	13,000	769.60	710.40	2,240	528.60	522.00	380	527.00	547.40
Tennessee	180,720	759.00	711.00	154,500	801.40	750.40	18,790	509.20	491.00	7,430	510.00	502.00
Texas	346,340	780.40	727.00	293,030	826.40	774.00	40,100	521.60	495.00	13,210	543.60	525.00
Utah	27,970	788.00	716.00	24,050	824.00	752.70	3,230	570.00	557.00	690	554.20	524.00
Vermont	16,190	758.80	709.70	13,780	801.40	749.70	1,920	516.00	518.50	490	512.40	542.00
Virginia	162,500	791.80	735.70	139,550	834.80	780.00	17,530	527.80	506.70	5,420	538.00	518.40
Washington	115,320	816.60	755.90	100,830	847.00	788.00	11,500	608.60	616.50	2,990	593.60	592.00
West Virginia	81,840	820.40	756.40	68,190	876.80	827.70	10,370	516.80	501.00	3,280	609.00	603.40
Wisconsin	109,260	789.00	728.00	91,260	828.40	771.40	15,460	595.80	601.40	2,540	550.20	530.50
Wyoming	9,700	806.20	725.00	8,560	838.40	766.70	880	554.80	546.50	260	599.60	535.00
Outlying areas												
American Samoa	1,260	620.80	583.70	1,210	621.60	584.70	20	447.80	447.90	30	703.60	653.00
Guam	1,080	698.80	636.70	960	741.00	674.90	100	347.60	345.90	20	425.00	425.00
Northern Mariana Islands	150	323.60	246.00	90	393.80	300.00	60	218.60	200.00	0	...	...
Puerto Rico	159,180	653.20	625.70	131,340	712.80	664.80	22,800	352.40	331.00	5,040	457.80	435.90
Virgin Islands	1,710	740.80	709.70	1,260	829.00	809.20	380	472.80	409.70	70	610.80	602.70
Foreign countries	17,620	617.00	578.00	11,820	718.20	686.40	4,960	392.80	362.40	840	517.60	502.00

a. Includes beneficiaries with unknown state code.

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

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Shirley Turpin (410) 965-0181.

Table 5.K1—Number and percentage of beneficiaries and average monthly benefit, by state or other area and direct deposit status, December 2002

State or area	All beneficiaries		Beneficiaries using direct deposit			Beneficiaries not using direct deposit		
	Number	Average monthly benefit (dollars)	Number	Percentage of all beneficiaries	Average monthly benefit (dollars)	Number	Percentage of all beneficiaries	Average monthly benefit (dollars)
All areas	46,452,550	815.00	37,366,610	80.4	847.90	9,085,940	19.6	679.80
Alabama	856,990	758.40	635,990	74.2	803.10	221,000	25.8	629.70
Alaska	58,980	768.60	46,810	79.4	799.80	12,170	20.6	648.50
Arizona	834,520	834.20	740,130	88.7	859.80	94,390	11.3	633.00
Arkansas	528,840	742.70	401,430	75.9	781.80	127,410	24.1	619.30
California	4,304,080	824.90	3,702,980	86.0	845.90	601,100	14.0	695.30
Colorado	549,870	802.50	462,780	84.2	825.50	87,090	15.8	680.30
Connecticut	581,160	908.30	459,860	79.1	937.60	121,300	20.9	797.20
Delaware	140,960	862.70	119,940	85.1	887.10	21,020	14.9	723.50
District of Columbia	73,280	709.60	55,160	75.3	739.00	18,120	24.7	620.40
Florida	3,278,010	825.60	2,923,450	89.2	847.30	354,560	10.8	646.20
Georgia	1,146,950	781.50	869,040	75.8	825.40	277,910	24.2	644.30
Hawaii	193,220	819.30	167,310	86.6	837.00	25,910	13.4	705.30
Idaho	204,970	801.30	177,490	86.6	820.50	27,480	13.4	677.30
Illinois	1,862,070	859.10	1,500,820	80.6	885.40	361,250	19.4	750.10
Indiana	1,012,160	855.10	801,060	79.1	885.10	211,100	20.9	741.40
Iowa	542,290	823.10	467,870	86.3	842.20	74,420	13.7	702.80
Kansas	441,780	840.10	369,820	83.7	863.10	71,960	16.3	721.90
Kentucky	754,480	751.00	535,190	70.9	798.50	219,290	29.1	635.30
Louisiana	725,200	734.80	492,660	67.9	790.40	232,540	32.1	617.10
Maine	258,140	749.30	201,930	78.2	783.30	56,210	21.8	627.30
Maryland	743,760	834.20	594,900	80.0	858.90	148,860	20.0	735.60
Massachusetts	1,062,670	829.50	847,860	79.8	856.40	214,810	20.2	723.20
Michigan	1,677,280	874.00	1,383,350	82.5	901.80	293,930	17.5	743.40
Minnesota	755,250	823.60	636,430	84.3	847.20	118,820	15.7	696.80
Mississippi	531,390	716.80	399,510	75.2	760.80	131,880	24.8	583.70
Missouri	1,021,950	803.40	821,970	80.4	832.20	199,980	19.6	685.00
Montana	161,580	788.10	136,730	84.6	809.30	24,850	15.4	672.00
Nebraska	287,040	808.00	245,050	85.4	828.70	41,990	14.6	687.50
Nevada	314,120	846.30	267,540	85.2	865.70	46,580	14.8	734.60
New Hampshire	207,860	843.40	173,210	83.3	860.60	34,650	16.7	730.50
New Jersey	1,363,370	915.60	1,100,800	80.7	939.70	262,570	19.3	814.50
New Mexico	289,570	745.50	232,780	80.4	789.10	56,790	19.6	566.60
New York	3,024,130	868.20	2,421,590	80.1	896.90	602,540	19.9	752.50
North Carolina	1,406,150	791.70	1,068,660	76.0	837.40	337,490	24.0	647.10
North Dakota	113,960	764.40	94,010	82.5	788.60	19,950	17.5	650.70
Ohio	1,929,680	829.00	1,493,540	77.4	859.00	436,140	22.6	726.50
Oklahoma	605,840	782.70	485,260	80.1	814.70	120,580	19.9	654.20
Oregon	587,580	803.70	526,250	89.6	852.80	61,330	10.4	701.20
Pennsylvania	2,376,520	850.00	1,897,440	79.8	874.60	479,080	20.2	752.60
Rhode Island	191,490	829.30	151,590	79.2	859.80	39,900	20.8	713.40
South Carolina	718,990	784.70	548,760	76.3	831.50	170,230	23.7	633.80
South Dakota	137,630	752.50	116,580	84.7	775.30	21,050	15.3	626.10
Tennessee	1,028,360	778.30	778,820	75.7	820.60	249,540	24.3	646.30
Texas	2,730,970	784.90	2,136,140	78.2	826.90	594,830	21.8	634.30
Utah	250,840	818.80	216,810	86.4	841.50	34,030	13.6	673.90
Vermont	106,860	801.90	87,390	81.8	827.30	19,470	18.2	688.20
Virginia	1,072,310	799.60	830,130	77.4	835.50	242,180	22.6	676.50
Washington	874,040	858.20	777,300	88.9	877.70	96,740	11.1	701.70
West Virginia	398,700	788.30	260,560	65.4	834.40	138,140	34.6	701.40
Wisconsin	915,290	848.60	773,600	84.5	869.60	141,690	15.5	733.80
Wyoming	79,190	825.00	67,470	85.2	844.10	11,720	14.8	715.40
Outlying areas								
Puerto Rico	688,140	529.50	371,960	54.1	611.60	316,180	45.9	433.00
Other ^a	452,090	496.40	290,900	64.3	502.00	161,190	35.7	486.40

a. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

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

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Joseph Bondar (410) 965-0162 or Shirley Turpin (410) 965-0181.

5.L OASDI Current-Pay Benefits: With Representative Payee

Table 5.L1—Number of beneficiaries with a representative payee as a percentage of all beneficiaries, by type of beneficiary and age, December 2002

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percentage of all beneficiaries
Total ^a	46,452,550	4,900,250	10.5
Adult beneficiaries	43,410,850	1,860,850	4.3
Retired workers	29,203,660	434,160	1.5
Under 65	2,578,870	5,760	0.2
65–74	14,181,970	130,170	0.9
75–84	9,362,710	148,170	1.6
85 or older	3,080,110	150,060	4.9
Disabled workers	5,535,860	663,120	12.0
Under 35	379,030	110,480	29.1
35–44	967,040	169,230	17.5
45–54	1,752,400	211,670	12.1
55 or older	2,437,390	171,740	7.0
Wives and husbands	2,832,350	21,290	0.8
Under 65	460,950	2,600	0.6
65–74	1,424,150	8,460	0.6
75–84	829,330	7,550	0.9
85 or older	117,920	2,680	2.3
Widow(er)s ^b	4,759,280	136,830	2.9
Under 65	646,300	2,610	0.4
65–74	1,400,840	21,260	1.5
75–84	1,743,600	48,710	2.8
85 or older	968,540	64,250	6.6
Disabled widow(er)s	205,870	14,200	6.9
Under 55	27,080	2,170	8.0
55–64	178,790	12,030	6.7
Disabled adult children	748,660	587,910	78.5
Under 35	208,460	148,070	71.0
35–44	208,630	164,690	78.9
45–54	172,450	141,180	81.9
55 or older	159,120	133,970	84.2
Students aged 18–19	125,170	3,330	2.7
Children under age 18	3,041,690	3,039,400	99.9
In custody of parent payee	2,724,180	2,724,180	100.0
Not in custody of parent payee	317,510	315,220	99.3

a. Includes special age-72 beneficiaries.

b. Includes nondisabled widow(er)s, widowed mothers and fathers, and parents.

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

CONTACT: Robert L. Hackendorf (410) 965-5536 or Cherice N. Jefferies (410) 965-5520.

5.M OASDI Current-Pay Benefits: International Agreements

Table 5.M1—Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2002, selected years

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widow(er)s ^a	Children
<i>Number</i>						
1983	1,541	970	97	266	109	99
1984	2,717	1,664	254	435	202	162
1985	7,857	4,773	404	1,730	578	372
1990	27,662	17,432	1,609	5,801	2,078	742
1995	54,806	35,925	2,428	10,974	4,431	1,048
1996	59,455	39,085	2,514	11,917	4,893	1,046
1997	63,842	42,163	2,662	12,583	5,342	1,092
1998	68,748	45,632	2,708	13,376	5,926	1,106
1999	74,933	50,018	2,749	14,421	6,636	1,109
2000	82,404	55,398	2,687	15,806	7,302	1,211
2001	88,770	59,713	2,859	17,013	7,917	1,268
2002	94,350	63,418	2,992	18,032	8,585	1,323
Austria	776	572	63	89	34	18
Belgium	560	406	6	98	41	9
Canada	38,801	23,875 _b	1,512 _b	8,406 _b	4,497 _b	511 _b
Chile	2					
Finland	170	124	9	25	6	6
France	3,260	2,361	38	581	222	58
Germany	14,374	10,828	644	1,925	789	188
Greece	2,097	1,412	94	423	127	41
Ireland	1,086	786	29	182	68	21
Italy	7,556	4,831 _b	101 _b	1,432 _b	1,076 _b	116 _b
Luxembourg	30					
Netherlands	1,793	1,265	11	380	111	26
Norway	3,082	1,983	96	622	340	41
Portugal	1,717	1,116	102	281	176	42
Spain	1,783	1,094	65	389	190	45
Sweden	1,284	957	25	227	53	22
Switzerland	3,016	2,219	30	592	136	39
United Kingdom	12,963	9,569	165	2,375	716	138
<i>Average monthly benefit (dollars)</i>						
1983	62.61	68.77	145.68	24.01	49.27	40.16
1984	79.29	90.32	144.07	25.64	51.61	42.90
1985	73.52	86.52	147.43	32.04	60.94	38.79
1990	108.07	122.87	223.71	44.37	88.01	63.88
1995	134.13	155.20	271.21	51.27	108.60	69.88
1996	138.89	160.65	287.11	52.80	112.45	74.22
1997	143.69	165.94	298.78	54.24	115.62	74.27
1998	146.37	169.15	305.43	55.08	117.87	73.49
1999	151.22	174.94	312.05	56.58	123.64	78.56
2000	157.03	182.39	324.60	59.01	127.96	79.70
2001	162.05	188.04	340.20	60.96	131.50	83.98
2002	165.18	191.74	345.58	62.45	134.02	86.28
Austria	200.41	225.86	219.73	62.79	163.38	74.22
Belgium	166.74	194.02	382.50	58.28	151.04	44.67
Canada	138.93	159.03 _b	333.56 _b	58.93 _b	122.20 _b	87.52 _b
Chile	146.50					
Finland	172.06	173.48	462.78	63.12	207.17	125.33
France	175.76	203.73	387.55	67.67	154.30	63.28
Germany	211.09	237.11	335.02	63.75	143.09	81.69
Greece	143.02	153.49	376.95	62.95	135.72	94.76
Ireland	187.92	206.30	519.41	73.93	176.03	68.33
Italy	151.01	179.28 _b	432.93 _b	60.45 _b	124.81 _b	89.25 _b
Luxembourg	196.96					
Netherlands	159.78	186.13	617.09	66.71	149.84	87.23
Norway	162.11	179.98	403.20	69.76	165.03	109.85
Portugal	156.44	166.52	354.69	64.68	138.54	95.93
Spain	143.48	161.86	330.51	59.65	150.11	123.02
Sweden	153.49	170.40	308.32	65.87	171.04	103.68
Switzerland	156.07	179.24	416.42	63.12	149.35	71.26
United Kingdom	206.69	242.44	365.29	70.09	170.27	77.61

a. Includes nondisabled and disabled widow(er)s and mothers and fathers.
b. Not shown to avoid disclosure of information regarding particular individuals.

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

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2002

Year	All benefits	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers				
Total	185,609,790	76,358,747	19,823,005	17,879,508	3,694,843	7,020,103	20,634,107	14,210,430	4,743,351	19,864,372	113,890	1,267,434
1940	254,984	132,335	...	34,555	...	8,249	51,133	...	23,260	4,600	852	...
1941	269,286	114,660	...	36,213	...	6,031	69,588	...	30,502	11,020	1,272	...
1942	258,116	99,622	...	33,250	...	4,859	72,525	...	31,820	14,774	1,266	...
1943	262,865	89,070	...	31,916	...	3,652	81,967	...	35,420	19,576	1,264	...
1944	318,949	110,097	...	40,349	...	4,350	95,326	...	42,649	24,759	1,419	...
1945	462,463	185,174	...	63,068	...	7,215	120,299	...	55,108	29,844	1,755	...
1946	547,150	258,980	...	88,515	...	10,736	104,139	...	44,190	38,823	1,767	...
1947	572,909	271,488	...	94,189	...	12,446	103,308	...	42,807	45,249	3,422	...
1948	596,201	275,903	...	98,554	...	12,604	106,351	...	44,276	55,667	2,846	...
1949	682,241	337,273	...	117,356	...	15,854	103,068	...	43,087	62,928	2,775	...
1950	962,628	567,131	...	162,768	...	25,495	97,146	...	41,101	66,735	2,252	...
1951	1,336,432	702,984	...	228,887	...	40,958	189,542	...	78,323	89,591	6,147	...
1952	1,053,303	531,206	...	177,707	...	24,695	158,650	...	64,875	92,302	3,868	...
1953	1,419,462	771,671	...	246,856	...	33,868	178,310	...	71,945	112,866	3,946	...
1954	1,401,733	749,911	...	236,764	...	35,938	176,858	...	70,775	128,026	3,461	...
1955	1,657,773	909,883	...	288,915	...	40,402	198,393	...	76,018	140,624	3,538	...
1956	1,855,296	934,033	...	384,562	...	37,900	173,883	...	67,475	253,524	3,919	...
1957	2,832,344	1,424,975	178,802	578,012	...	81,842	231,321	...	88,174	244,633	4,585	...
1958 ^a	2,123,465	1,041,668	131,382	366,553	12,920	63,408	205,110	18,264	81,467	199,320	3,373	...
1959 ^b	2,501,802	1,089,740	177,811	390,517	54,299	83,157	265,123	78,655	102,020	252,683	7,797	...
1960	2,336,144	981,717	207,805	339,987	54,187	69,979	241,430	104,310	92,607	239,267	4,855	...
1961	3,046,653	1,361,505	279,758	394,198	77,588	126,019	264,440	189,283	98,449	251,275	4,138	...
1962	3,004,501	1,347,268	250,634	393,857	69,212	135,984	266,286	170,354	99,925	267,051	3,930	...
1963	2,729,559	1,145,602	223,739	345,610	66,543	115,220	281,511	163,967	104,960	278,709	3,698	...
1964	2,552,063	1,041,807	207,592	316,262	59,706	100,051	288,304	145,439	106,249	283,263	3,390	...
1965	3,072,426	1,183,133	253,499	321,015	69,183	134,187	451,399	197,616	100,005	359,431	2,958	...
1966	4,722,483	1,647,524	278,345	396,856	81,238	195,055	584,901	276,093	107,135	403,595	3,202	748,539
1967	3,596,770	1,161,130	301,359	319,503	87,296	167,676	534,568	282,662	110,762	355,589	2,658	273,567
1968	3,619,927	1,240,098	323,154	329,935	89,603	172,460	593,331	299,016	113,765	375,391	2,144	81,030
1969	3,699,633	1,272,784	344,741	335,723	94,690	176,162	622,109	313,629	116,922	375,753	2,093	45,027
1970	3,722,433	1,338,107	350,384	339,447	96,304	182,595	591,724	316,546	112,377	363,216	1,852	29,881
1971	3,965,157	1,391,403	415,897	338,219	113,222	196,589	613,193	372,224	116,548	381,262	1,635	24,965
1972	4,202,607	1,461,399	455,438	353,742	124,366	209,422	643,513	411,766	117,699	402,809	2,086	20,367
1973	4,220,493	1,493,194	491,616	349,493	128,198	217,708	618,825	413,751	118,775	372,167	1,655	15,111
1974	4,100,809	1,413,145	535,977	319,149	132,042	201,684	574,174	443,909	109,221	363,693	1,155	6,660
1975	4,427,138	1,505,750	592,049	350,558	148,741	225,579	591,118	515,216	116,224	377,246	969	3,688
1976	4,351,654	1,475,773	551,460	346,623	147,407	236,805	578,905	511,487	113,520	385,373	914	3,387
1977	4,610,730	1,593,631	568,874	390,874	151,938	259,447	587,589	518,477	118,821	416,735	870	3,474
1978	4,166,571	1,472,786	464,415	346,956	130,161	214,284	566,992	453,382	110,015	403,679	844	3,057
1979	4,229,286	1,590,854	416,713	358,163	113,243	247,800	544,549	399,172	110,424	445,555	788	2,025
1980	4,214,567	1,612,669	396,559	360,693	108,500	248,658	540,246	385,208	107,809	452,156	724	1,345
1981	4,029,827	1,578,990	351,847	338,540	95,575	211,406	535,487	339,654	99,653	477,121	606	948
1982	3,840,579	1,618,411	297,131	349,967	77,835	182,849	473,396	260,470	86,786	492,451	498	785
1983	3,755,994	1,669,738	311,549	356,274	80,079	144,945	380,992	226,895	82,464	501,688	431	939
1984	3,690,103	1,607,370	361,998	342,691	81,834	131,986	351,326	238,252	73,794	499,677	383	792
1985	3,796,394	1,690,490	377,371	356,558	83,511	128,076	332,531	253,025	72,241	501,673	381	537
1986	3,853,454	1,734,248	416,865	358,115	82,435	122,652	319,808	258,167	69,340	491,052	344	428
1987	3,733,853	1,681,716	415,848	333,333	77,316	117,984	310,573	256,742	64,777	475,035	286	243
1988	3,680,969	1,654,068	409,490	316,929	73,790	116,659	324,346	265,026	62,676	457,574	263	148
1989	3,646,349	1,656,744	425,582	310,498	69,113	106,491	307,484	261,387	59,525	449,139	281	105
1990	3,716,924	1,664,754	467,977	308,980	69,667	108,105	303,616	283,586	58,060	451,862	233	84
1991	3,865,426	1,695,346	536,434	307,000	72,754	107,261	301,459	318,188	57,896	468,788	246	54
1992	4,050,849	1,707,949	636,637	304,764	78,083	108,686	304,300	381,585	56,402	472,078	298	67
1993	4,001,201	1,661,281	635,238	290,728	74,605	106,566	311,290	398,598	56,408	466,198	238	51
1994	3,940,342	1,625,347	631,870	275,025	69,549	102,983	310,051	411,205	54,732	459,340	213	27
1995	3,882,193	1,609,174	645,832	258,740	63,097	101,239	306,044	401,295	51,645	444,899	200	28
1996	3,793,238	1,581,452	624,335	244,014	57,528	98,655	302,480	397,350	49,150	438,081	177	16
1997	3,865,966	1,718,623	587,417	268,012	50,818	97,594	297,204	362,548	43,504	440,076	157	13
1998	3,800,259	1,631,511	608,131	263,668	47,550	96,893	294,851	371,426	42,395	443,669	152	13
1999	3,917,099	1,690,024	620,488	275,568	46,164	99,826	295,196	378,144	41,756	469,806	118	9
2000	4,290,080	1,960,649	621,650	341,503	43,941	115,358	297,686	363,632	40,491	505,021	135	14
2001	4,161,971	1,779,228	691,309	314,547	43,412	110,680	302,445	383,049	41,323	495,848	129	1
2002	4,335,714	1,812,551	750,003	317,685	45,600	116,186	310,395	419,780	40,829	522,537	139	9

a. January–November.

b. Includes December 1958.

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

NOTES: Benefits not necessarily payable at time of award.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A2—Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by type of benefit and sex, selected years 1940–2002 (in dollars)

Year ^a	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						
	All	Men	Women	Retired workers			Disabled workers			Non-disabled widows
				All	Men	Women	All	Men	Women	
1940	22.71	23.26	18.38	22.71	23.26	18.38	...	...	...	20.36
1945	25.11	25.71	19.99	25.11	25.71	19.99	...	...	...	20.17
1950 (Jan.–Aug.)	29.03	30.16	22.98	29.03	30.16	22.98	...	...	...	21.65
1950 (Sept.–Dec.)	33.24	35.32	26.85	33.24	35.32	26.85	...	...	...	36.89
1955	69.74	75.86	56.05	69.74	75.86	56.05	...	...	...	49.68
1960	83.87	92.03	69.23	81.73	92.03	63.26	91.16	94.02	78.91	62.12
1965 (Jan.–Aug.)	88.57	96.56	74.99	82.69	90.89	68.78	93.26	97.89	80.27	73.81
1965 (Sept.–Dec.)	99.36	108.79	82.34	89.20	99.90	71.26	101.30	106.51	86.75	75.37
1970	133.94	146.99	113.69	123.82	136.80	103.67	139.79	148.39	115.74	106.95
1975 (Jan.–May)	216.56	242.76	176.76	196.42	220.35	160.50	220.60	241.48	175.27	185.34
1975 (June–Dec.)	235.13	264.67	191.56	213.68	241.05	173.31	243.47	266.08	192.13	198.88
1980 (Jan.–May)	353.80	411.70	270.50	321.10	374.00	244.90	352.10	388.80	269.70	277.50
1980 (June–Dec.)	396.30	465.50	301.00	359.80	422.90	272.90	396.50	437.90	301.00	312.80
1981 (Jan.–May)	400.10	467.50	302.60	363.60	424.20	276.00	389.80	431.40	295.00	313.00
1981 (June–Dec.)	438.80	514.50	332.60	400.10	468.00	304.80	425.60	471.30	320.70	346.30
1982 (Jan.–May)	425.60	504.20	315.10	388.40	457.50	291.40	416.90	462.40	312.70	350.80
1982 (June–Dec.)	447.10	532.70	328.50	408.60	483.00	305.50	441.10	489.50	328.00	375.30
1983 (Jan.–Nov.)	448.00	531.60	330.00	408.20	480.30	306.50	432.40	480.30	317.90	385.10
1983 (Dec.)	451.20	546.40	325.50	410.20	491.80	302.50	445.30	496.80	333.20	400.50
1984 (Jan.–Nov.)	457.10	544.40	335.60	414.70	489.40	310.90	443.00	494.00	332.20	406.80
1984 (Dec.)	471.00	565.70	343.00	429.50	511.30	318.90	461.10	516.50	342.90	428.00
1985 (Jan.–Nov.)	475.70	566.20	348.00	432.00	509.60	322.20	459.20	514.00	345.00	431.10
1985 (Dec.)	487.60	588.30	352.00	443.10	530.00	326.10	477.60	535.90	357.20	436.90
1986 (Jan.–Nov.)	500.30	596.90	363.50	453.10	536.00	335.70	471.50	527.60	358.20	452.10
1986 (Dec.)	504.60	611.00	361.70	456.90	548.40	334.00	489.00	546.90	369.60	446.20
1987 (Jan.–Nov.)	516.80	618.90	374.10	466.10	553.60	343.90	487.00	546.80	368.90	462.00
1987 (Dec.)	536.90	648.80	386.80	484.00	580.00	355.20	517.10	583.40	391.80	477.40
1988 (Jan.–Nov.)	540.70	648.60	390.40	487.80	580.30	359.00	517.20	581.90	392.60	488.80
1988 (Dec.)	560.00	679.50	401.20	504.90	607.00	369.20	543.00	612.70	410.00	499.20
1989 (Jan.–Nov.)	572.80	686.90	412.90	516.60	614.80	379.00	539.90	608.00	414.40	512.90
1989 (Dec.)	597.50	724.90	425.90	538.70	647.50	392.10	571.20	645.90	437.50	525.70
1990 (Jan.–Nov.)	609.00	729.70	438.20	550.50	654.60	403.30	566.90	637.80	438.90	541.10
1990 (Dec.)	626.40	761.00	447.30	559.30	672.10	409.30	600.60	676.90	466.60	566.60
1991 (Jan.–Nov.)	642.80	768.90	460.40	583.50	692.30	426.10	593.00	666.90	464.20	573.70
1991 (Dec.)	656.20	793.40	467.40	592.80	709.50	432.10	613.20	689.70	481.50	582.10
1992 (Jan.–Nov.)	671.60	803.10	483.40	608.60	721.90	446.50	601.60	677.00	474.70	596.90
1992 (Dec.)	688.30	829.30	493.80	620.70	740.90	454.90	625.70	706.50	490.30	604.00
1993 (Jan.–Nov.)	697.10	831.50	507.10	630.60	746.20	467.00	621.70	699.80	494.70	620.70
1993 (Dec.)	716.20	861.70	519.00	645.90	769.80	477.90	649.90	735.70	512.30	618.90
1994 (Jan.–Nov.)	722.90	862.90	530.30	651.00	771.30	485.40	647.00	731.30	518.50	637.80
1994 (Dec.)	741.90	892.40	541.50	665.70	794.20	494.50	684.80	776.50	549.00	644.60
1995 (Jan.–Nov.)	744.30	887.00	551.40	671.70	794.30	505.80	675.70	767.30	546.00	662.50
1995 (Dec.)	765.30	917.60	563.60	668.40	818.00	516.70	703.40	798.70	568.70	675.40
1996 (Jan.–Nov.)	769.20	916.80	572.40	693.60	820.50	524.50	693.70	788.90	567.80	683.10
1996 (Dec.)	788.90	950.20	582.90	708.70	846.00	533.30	727.70	832.00	590.00	690.30
1997 (Jan.–Nov.)	787.10	951.70	608.50	723.30	854.30	581.30	718.30	820.40	590.70	700.60
1997 (Dec.)	812.80	982.00	610.40	734.50	876.90	564.40	748.40	851.60	615.10	699.90
1998 (Jan.–Nov.)	819.50	983.10	620.00	744.70	882.10	577.10	737.00	841.50	610.60	716.70
1998 (Dec.)	831.10	1,003.20	628.80	754.20	898.40	584.70	762.00	870.30	633.80	711.00
1999 (Jan.–Nov.)	857.60	1,023.20	649.50	777.10	918.40	599.60	763.90	870.60	636.60	713.30
1999 (Dec.)	875.70	1,043.90	663.70	791.20	934.30	610.70	792.60	904.30	660.60	708.20
2000 (Jan.–Nov.)	904.90	1,069.40	685.40	841.60	990.50	643.00	806.40	917.60	673.20	708.70
2000 (Dec.)	930.00	1,111.00	713.00	842.80	996.50	658.50	846.60	960.20	710.00	715.40
2001 (Jan.–Nov.)	953.90	1,134.50	730.80	855.70	1,008.40	667.20	847.00	961.70	711.00	735.80
2001 (Dec.)	982.10	1,168.90	749.90	881.10	1,039.10	684.70	868.40	982.70	734.90	717.10
2002 (Jan.–Nov.)	1,026.30	1,219.00	788.10	914.10	1,076.80	712.90	897.50	1,019.50	753.30	750.50
2002 (Dec.)	1,029.90	1,230.00	788.50	916.90	1,084.50	714.80	906.70	1,028.10	762.50	751.90

a. Some years are shown in several parts to reflect changes in benefit rates during the year.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2002

Age and basis of entitlement	All races ^a		White		Black		Other	
	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)
Retired workers^c								
Total	1,812,700	936.60	1,521,600	962.60	175,900	842.70	114,400	736.60
62–64	1,259,000	891.40	1,077,700	911.50	111,300	817.30	70,000	698.30
65–69	526,400	1,051.60	423,900	1,097.30	61,700	895.20	40,000	815.40
70 or older	27,300	804.90	20,000	859.00	2,900	699.50	4,400	628.50
<i>Men</i>								
Subtotal	1,003,500	1,096.30	849,700	1,134.50	89,300	949.50	64,000	796.90
62–64	675,200	1,056.20	580,400	1,089.80	57,000	912.00	37,800	756.60
65–69	318,800	1,191.60	262,800	1,241.50	31,200	1,027.40	24,300	871.70
70 or older	9,500	750.60	6,500	794.20	1,100	677.90	1,900	643.60
<i>Women</i>								
Subtotal	809,200	738.50	671,900	745.20	86,600	732.60	50,400	660.00
62–64	583,800	700.70	497,300	703.50	54,300	717.90	32,200	630.00
65–69	207,600	836.50	161,100	862.10	30,500	760.00	15,700	728.40
70 or older	17,800	833.90	13,500	890.20	1,800	712.60	2,500	617.10
Disabled workers								
Total	754,900	911.30	522,700	954.40	122,800	827.30	109,100	799.70
Under 30	57,500	523.60	35,500	525.00	11,300	513.80	10,700	529.40
30–39	95,200	770.50	62,600	808.20	17,600	705.20	14,900	689.30
40–49	180,400	886.10	119,400	927.50	29,600	810.00	31,200	801.20
50–54	138,200	956.50	93,100	991.40	23,800	870.70	21,300	899.90
55–59	163,600	1,035.20	121,900	1,071.50	23,500	944.10	18,200	909.10
60 or older	120,000	1,025.80	90,200	1,064.30	17,000	970.20	12,800	828.40
<i>Men</i>								
Subtotal	409,600	1,036.10	292,600	1,094.40	60,200	894.00	56,600	887.40
Under 30	32,900	521.80	20,000	521.20	5,800	474.80	7,100	562.00
30–39	48,300	807.10	32,100	843.20	8,800	742.90	7,400	726.60
40–49	95,100	982.60	63,100	1,045.90	14,800	861.20	17,000	856.90
50–54	70,500	1,101.60	50,100	1,146.20	10,200	956.60	10,200	1,027.70
55–59	93,000	1,215.30	72,500	1,260.00	11,500	1,048.40	9,000	1,069.20
60 or older	69,800	1,205.00	54,800	1,240.00	9,100	1,095.50	5,900	1,049.00
<i>Women</i>								
Subtotal	345,300	763.30	230,100	776.50	62,600	763.20	52,500	705.10
Under 30	24,600	526.00	15,500	529.90	5,500	554.90	3,600	465.00
30–39	46,900	732.80	30,500	771.30	8,800	667.50	7,500	652.50
40–49	85,300	778.50	56,300	794.80	14,800	758.80	14,200	734.50
50–54	67,700	805.30	43,000	810.90	13,600	806.20	11,100	782.50
55–59	70,600	797.80	49,400	795.00	12,000	844.30	9,200	752.50
60 or older	50,200	776.70	35,400	792.40	7,900	825.80	6,900	639.70
Wives								
Total	233,200	402.50	198,000	419.80	16,700	335.20	18,300	276.20
<i>Wives of retired workers</i>								
Subtotal	193,400	434.50	166,800	449.60	12,800	371.50	13,600	308.00
Entitlement based on care of children	13,900	398.70	11,600	414.50	1,100	339.00	1,200	300.30
Entitlement based on age	179,500	437.20	155,200	452.20	11,700	374.50	12,400	308.70
62–64	133,400	429.40	116,800	442.20	7,900	389.00	8,500	291.00
65–69	39,300	464.10	32,800	488.40	3,200	342.10	3,300	341.40
70 or older	6,800	434.90	5,600	449.10	600	357.20	600	379.80
<i>Wives of disabled workers</i>								
Subtotal	39,800	246.90	31,200	260.20	3,900	216.20	4,700	184.40
Entitlement based on care of children	17,700	184.40	12,300	196.60	2,400	176.20	3,000	141.10
Entitlement based on age	22,100	297.00	18,900	301.60	1,500	280.20	1,700	260.90
Husbands								
Total	12,900	236.90	8,800	238.00	1,300	272.10	2,800	217.20
Husbands of retired workers	10,800	249.70	7,800	1,260.00	1,000	296.20	2,000	210.90
Husbands of disabled workers	2,100	171.10	1,000	115.50	300	^d	800	232.90

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2002—Continued

Age and basis of entitlement	All races ^a		White		Black		Other	
	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)
Children								
Total	785,300	...	507,300	...	162,200	...	113,100	...
By age								
Under age 18	543,100	369.70	339,800	395.90	110,800	303.40	92,000	352.00
Disabled, aged 18 or older	37,500	444.60	26,600	469.40	7,800	379.20	3,000	397.20
Students aged 18–19	204,700	517.00	140,900	542.90	43,600	466.60	18,100	424.00
By basis of entitlement								
Children of retired workers	107,600	424.20	76,200	452.40	21,500	368.90	9,600	328.00
Children of deceased workers	296,300	619.30	187,400	656.90	58,200	549.70	48,900	554.00
Children of disabled workers	381,400	246.80	243,700	270.50	82,500	205.90	54,600	201.70
Widowed mothers and fathers								
Total	35,500	625.50	24,100	655.20	4,200	542.50	7,200	574.60
By age								
Under 30	3,200	515.70	1,700	526.40	500	355.70	1,000	577.50
30–39	12,300	573.60	8,400	595.20	1,600	508.60	2,300	539.80
40–49	14,500	704.50	9,600	752.70	1,700	637.50	3,200	595.70
50–59	4,700	592.90	3,900	593.00	100	^d	700	588.70
60 or older	800	622.50	500	713.10	300	^d	...	...
By basis of entitlement								
Widowed mothers	30,800	647.50	20,900	679.40	3,700	557.50	6,200	593.50
Widowed fathers	4,700	481.40	3,200	496.60	500	431.40	1,000	457.40
Nondisabled widow(er)s								
Total	330,300	927.80	283,200	958.60	32,300	746.00	14,600	733.20
By age								
60–64	154,000	881.60	124,700	913.00	19,100	762.30	10,100	717.60
65–69	54,000	896.10	45,500	932.60	6,400	664.60	2,100	810.00
70–74	32,100	994.50	29,400	1,009.30	1,900	860.70	700	821.20
75 or older	90,200	1,001.80	83,600	1,023.10	4,900	744.50	1,700	694.50
By basis of entitlement								
Widows	315,300	943.80	271,400	975.30	30,300	755.40	13,400	734.30
Widowers	15,000	591.30	11,800	576.00	2,000	603.80	1,200	720.40
Disabled widow(er)s								
Total	29,200	586.50	20,100	592.80	5,200	537.10	3,800	610.90
By age								
50–54	10,700	554.70	6,100	579.70	2,400	511.90	2,100	510.80
55–59	15,500	615.90	12,200	615.20	1,800	542.00	1,500	710.30
60 or older	3,000	548.50	1,800	485.20	1,000	588.70	200	^d
By basis of entitlement								
Widows	28,400	591.30	19,700	597.40	5,000	537.50	3,600	622.20
Widowers	800	416.20	400	^d	200	^d	200	^d

a. Includes 4,300 persons of unknown race.

b. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

c. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

d. Average benefits are not shown for fewer than 500 beneficiaries.

SOURCE: Social Security Administration, Master Beneficiary Record, 1 percent sample.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 6.A4—Number and average monthly benefit for retired and disabled workers, by age in month of award and sex, 2002

Age	Total		Men		Women	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
	Retired workers					
Total ^b	1,812,551	914.30	1,001,135	1,077.30	811,416	713.00
62–64	1,254,782	871.80	673,044	1,039.60	581,738	677.60
62	893,906	822.20	464,647	991.10	429,259	639.40
63	123,999	923.70	70,621	1,075.30	53,378	723.00
64	236,877	1,031.50	137,776	1,184.60	99,101	818.60
65–69	531,976	1,018.90	319,221	1,166.00	212,755	798.20
65	492,116	1,034.60	297,828	1,187.70	194,288	799.80
Disability conversions	217,021	899.10	126,195	1,056.70	90,826	680.20
New entitlements	275,095	1,141.50	171,633	1,284.10	103,462	904.90
66	15,468	812.20	9,038	874.10	6,430	725.20
67	10,081	804.60	5,526	831.70	4,555	771.70
68	7,698	831.80	3,815	851.90	3,883	812.00
69	6,613	881.90	3,014	905.50	3,599	862.10
70–74	21,398	866.30	6,835	816.00	14,563	889.90
75 or older	4,395	610.30	2,035	541.20	2,360	669.80
	Disabled workers					
Total	750,003	898.10	406,336	1,020.10	343,667	753.90
Under 25	28,103	445.00	16,612	453.70	11,491	432.40
25–29	28,707	603.30	15,129	620.70	13,578	584.00
30–34	37,698	711.10	19,469	738.60	18,229	681.70
35–39	57,039	771.00	29,353	818.40	27,686	720.80
40–44	81,571	829.90	41,836	906.70	39,735	749.00
45–49	100,394	895.00	51,405	1,002.00	48,989	782.80
50–54	134,165	958.60	70,933	1,101.20	63,232	798.70
50	25,511	935.20	13,472	1,063.80	12,039	791.40
51	25,930	945.30	13,654	1,080.20	12,276	795.10
52	26,279	954.00	13,761	1,097.50	12,518	796.10
53	26,952	968.10	14,200	1,115.20	12,752	804.30
54	29,493	986.00	15,846	1,141.60	13,647	805.40
55–59	163,840	1,010.30	91,517	1,181.40	72,323	793.80
55	37,723	1,005.10	20,964	1,164.60	16,759	805.70
56	29,970	999.80	16,603	1,165.00	13,367	794.70
57	30,058	1,001.10	16,549	1,174.40	13,509	788.90
58	31,756	1,017.30	17,853	1,195.10	13,903	788.90
59	34,333	1,026.90	19,548	1,207.00	14,785	788.80
60–64	118,486	1,023.70	70,082	1,191.50	48,404	780.70
60	33,171	1,030.10	19,272	1,204.10	13,899	788.70
61	30,594	1,031.70	18,092	1,199.80	12,502	788.30
62	26,711	1,040.40	15,936	1,210.90	10,775	788.30
63	16,123	1,012.10	9,636	1,174.00	6,487	771.50
64 ^c	11,887	963.70	7,146	1,117.10	4,741	732.40

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

c. Includes 1,038 beneficiaries with awards processed after attainment of age 65.

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A5—Number and average monthly benefit with reduction for early retirement, by type of benefit, age in month of award, and sex, 2002

Age	Total		Men		Women	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
			Retired workers			
Total	1,288,882	873.30	692,982	1,040.20	595,900	679.40
62	893,906	822.20	464,647	991.10	429,259	639.40
63	123,999	923.70	70,621	1,075.30	53,378	723.00
64	224,256	1,032.20	130,197	1,184.90	94,059	821.00
65	45,733	962.40	26,875	1,104.00	18,858	760.50
66 or older	988	600.70	642	635.60	346	536.00
			Disabled workers			
Total	27,323	1,002.90	17,243	1,152.00	10,080	747.90
62	8,197	1,060.40	5,309	1,206.30	2,888	792.10
63	10,215	1,003.40	6,417	1,152.60	3,798	751.30
64 ^b	8,911	949.50	5,517	1,099.10	3,394	706.40
			Wives and husbands			
Total	249,737	334.30	4,259	205.90	245,478	336.60
			<i>By basis of entitlement</i>			
Wives and husbands of retired workers	228,808	339.60	3,703	212.70	225,105	341.60
Wives and husbands of disabled workers	20,929	277.40	556	160.60	20,373	280.60
			<i>By sex</i>			
Wives	245,478	336.60	...	...	245,478	336.60
62	147,278	331.40	...	...	147,278	331.40
63	38,640	326.00	...	...	38,640	326.00
64	45,956	367.50	...	...	45,956	367.50
65	8,110	334.60	...	...	8,110	334.60
66	1,732	303.50	...	...	1,732	303.50
67 or older	3,762	288.40	...	...	3,762	288.40
Husbands	4,259	205.90	4,259	205.90	...	...
			Nondisabled widow(er)s			
Total	193,628	804.60	13,278	625.00	180,350	817.80
Nondisabled widows	180,350	817.80	...	...	180,350	817.80
60	70,590	849.40	...	...	70,590	849.40
61	22,966	860.80	...	...	22,966	860.80
62	22,235	824.30	...	...	22,235	824.30
63	15,633	782.40	...	...	15,633	782.40
64	22,017	845.50	...	...	22,017	845.50
65	16,168	665.80	...	...	16,168	665.80
66	814	757.50	...	...	814	757.50
67–69	2,029	749.60	...	...	2,029	749.60
70 or older	7,898	719.40	...	...	7,898	719.40
Nondisabled widowers	13,278	625.00	13,278	625.00	...	...

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

b. Includes 768 beneficiaries with awards processed after attainment of age 65.

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

NOTE: ... = not applicable.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2002

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit ^a (dollars)	Number	Percent	Average monthly benefit ^a (dollars)
All areas ^b	1,812,551	100.0	914.30	750,003	100.0	898.10
Alabama	30,846	1.7	888.40	20,045	2.7	875.20
Alaska	3,092	0.2	877.50	1,211	0.2	932.60
Arizona	33,342	1.8	927.80	13,816	1.8	913.10
Arkansas	19,709	1.1	859.40	11,907	1.6	853.40
California	180,114	9.9	904.80	67,656	9.0	863.70
Colorado	23,507	1.3	909.00	7,354	1.0	912.10
Connecticut	22,247	1.2	1,005.80	7,272	1.0	962.10
Delaware	5,555	0.3	957.80	2,332	0.3	927.50
District of Columbia	3,114	0.2	799.50	1,220	0.2	821.80
Florida	121,035	6.7	885.20	40,865	5.4	890.50
Georgia	47,907	2.6	901.90	21,822	2.9	895.00
Hawaii	7,855	0.4	903.40	2,337	0.3	923.00
Idaho	8,416	0.5	885.20	3,460	0.5	877.70
Illinois	73,910	4.1	941.80	28,888	3.9	941.90
Indiana	40,032	2.2	972.80	16,915	2.3	926.50
Iowa	20,327	1.1	920.60	6,812	0.9	881.10
Kansas	16,544	0.9	934.00	5,977	0.8	882.80
Kentucky	26,239	1.4	867.20	16,569	2.2	869.60
Louisiana	24,707	1.4	841.20	14,329	1.9	864.20
Maine	8,984	0.5	836.50	4,911	0.7	818.60
Maryland	31,861	1.8	932.90	10,396	1.4	945.40
Massachusetts	38,525	2.1	922.50	16,856	2.2	887.50
Michigan	63,901	3.5	1,003.20	29,311	3.9	943.40
Minnesota	31,066	1.7	946.20	10,822	1.4	910.30
Mississippi	18,576	1.0	854.10	11,134	1.5	859.00
Missouri	38,150	2.1	899.90	17,727	2.4	895.10
Montana	6,375	0.4	856.80	2,061	0.3	855.30
Nebraska	10,438	0.6	902.80	3,833	0.5	867.40
Nevada	15,529	0.9	904.90	6,119	0.8	938.20
New Hampshire	8,330	0.5	963.40	3,864	0.5	901.70
New Jersey	56,481	3.1	1,009.90	18,529	2.5	1,012.50
New Mexico	11,497	0.6	839.40	5,219	0.7	828.60
New York	122,274	6.7	962.30	45,894	6.1	970.40
North Carolina	57,250	3.2	908.60	27,807	3.7	890.80
North Dakota	3,828	0.2	846.80	1,252	0.2	861.80
Ohio	70,970	3.9	928.70	26,353	3.5	891.20
Oklahoma	23,610	1.3	877.30	10,504	1.4	869.10
Oregon	23,707	1.3	920.10	8,504	1.1	921.40
Pennsylvania	83,448	4.6	954.00	34,734	4.6	903.60
Rhode Island	6,594	0.4	916.50	3,108	0.4	849.70
South Carolina	28,870	1.6	899.00	14,039	1.9	901.30
South Dakota	4,852	0.3	846.90	1,486	0.2	825.00
Tennessee	40,501	2.2	896.90	19,390	2.6	880.50
Texas	111,900	6.2	887.00	51,818	6.9	878.20
Utah	10,575	0.6	918.60	3,411	0.5	893.30
Vermont	4,424	0.2	906.00	1,694	0.2	845.80
Virginia	45,272	2.5	918.10	17,522	2.3	897.60
Washington	36,884	2.0	955.80	14,743	2.0	927.20
West Virginia	12,808	0.7	906.40	8,570	1.1	905.00
Wisconsin	35,652	2.0	954.90	13,603	1.8	920.40
Wyoming	3,317	0.2	906.10	897	0.1	893.70
Outlying areas						
Puerto Rico	21,481	1.2	619.20	11,460	1.5	768.30
Other ^c	16,124	0.9	494.00	1,645	0.2	655.90

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

b. Includes beneficiaries with state code unknown.

c. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B1—Number of initial awards to retired workers aged 62–64, average primary insurance amount, average monthly benefit, and number of months benefits withheld due to earnings, by sex and age in month of award, 2002

Age	All initial awards ^a	Benefits received for all entitlement months ^b	Benefits withheld due to earnings for—		
			All entitlement months	One-half or more of entitlement months	Less than one-half of entitlement months
Number					
<i>All beneficiaries</i>					
Total	1,226,100	1,144,800	11,400	41,400	21,800
62	882,600	827,400	8,600	26,800	15,200
63	124,900	110,900	2,200	6,700	4,400
64	218,600	206,500	600	7,900	2,200
<i>Men</i>					
Subtotal	653,300	606,700	7,500	23,700	11,100
62	459,600	427,800	5,700	14,800	8,200
63	69,200	62,200	1,400	3,600	1,500
64	124,500	116,700	400	5,300	1,400
<i>Women</i>					
Subtotal	572,800	538,100	3,900	17,700	10,700
62	423,000	399,600	2,900	12,000	7,000
63	55,700	48,700	800	3,100	2,900
64	94,100	89,800	200	2,600	800
Average primary insurance amount^c (dollars)					
<i>All beneficiaries</i>					
Total	1,040.10	1,036.80	1,140.50	1,137.90	1,015.20
62	1,032.90	1,031.30	1,092.20	1,088.80	1,022.00
63	1,049.60	1,043.70	1,291.80	1,149.00	954.30
64	1,063.70	1,055.40	1,278.40	1,295.00	1,089.90
<i>Men</i>					
Subtotal	1,253.30	1,252.30	1,293.00	1,332.90	1,218.70
62	1,261.70	1,263.60	1,231.10	1,288.30	1,231.90
63	1,241.50	1,234.40	1,490.20 ^d	1,372.70	1,128.60
64	1,229.00	1,220.30		1,430.30	1,238.20
<i>Women</i>					
Subtotal	796.90	794.00	847.10	876.80	804.10
62	784.30	782.60	819.10	842.70	776.20
63	811.20	800.10	944.50 ^d	889.30	864.10
64	845.10	841.20		1,019.20	830.40
Average monthly benefit^c (dollars)					
<i>All beneficiaries</i>					
Total	878.30	876.00	933.70	965.70	840.60
62	829.80	828.90	864.90	875.50	809.80
63	927.50	923.30	1,118.00	1,007.40	843.20
64	1,046.10	1,039.60	1,243.60	1,236.20	1,048.30
<i>Men</i>					
Subtotal	1,037.50	1,036.20	1,051.00	1,125.80	999.40
62	989.90	990.90	968.80	1,020.40	971.50
63	1,079.60	1,072.80	1,285.60 ^d	1,204.80	995.10
64	1,189.90	1,182.80		1,366.50	1,167.80
<i>Women</i>					
Subtotal	696.70	695.40	708.00	751.30	675.80
62	655.80	655.40	660.80	696.80	620.40
63	738.60	732.30	824.60 ^d	778.20	764.60
64	855.70	853.60		970.70	839.10

a. Includes 6,700 awards for which benefits were withheld for reasons other than earnings.

b. Months of entitlement begin with the month of award and end either in December 2002 or the month before the retired-worker benefit is terminated.

c. Amount for December 2002 or the amount for the latest month of entitlement multiplied by the December benefit increase.

d. Average amounts not shown for groups with fewer than 500 beneficiaries.

SOURCE: Social Security Administration, Master Beneficiary Record, 1 percent sample.

NOTE: Excludes persons whose benefits were converted from disabled worker to retired worker in 2002. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

CONTACT: Diane Wallace (410) 965-0165 or Barbara Lingg (410) 965-0156.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2002

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	1,812,551	100.0	523,669	100.0	1,288,882	100.0
Less than 500.00	288,590	15.9	63,418	12.1	225,172	17.5
500.00–549.90	85,995	4.7	18,376	3.5	67,619	5.2
550.00–599.90	89,718	4.9	18,881	3.6	70,837	5.5
600.00–649.90	86,961	4.8	19,617	3.7	67,344	5.2
650.00–699.90	75,914	4.2	19,922	3.8	55,992	4.3
700.00–749.90	71,734	4.0	20,064	3.8	51,670	4.0
750.00–799.90	69,232	3.8	20,208	3.9	49,024	3.8
800.00–849.90	67,294	3.7	19,683	3.8	47,611	3.7
850.00–899.90	64,524	3.6	18,939	3.6	45,585	3.5
900.00–949.90	63,910	3.5	18,753	3.6	45,157	3.5
950.00–999.90	63,464	3.5	18,777	3.6	44,687	3.5
1,000.00–1,049.90	62,261	3.4	18,428	3.5	43,833	3.4
1,050.00–1,099.90	60,838	3.4	17,892	3.4	42,946	3.3
1,100.00–1,149.90	60,189	3.3	17,731	3.4	42,458	3.3
1,150.00–1,199.90	73,856	4.1	16,507	3.2	57,349	4.4
1,200.00–1,249.90	87,213	4.8	16,371	3.1	70,842	5.5
1,250.00–1,299.90	85,086	4.7	17,679	3.4	67,407	5.2
1,300.00–1,349.90	77,835	4.3	18,561	3.5	59,274	4.6
1,350.00–1,399.90	70,397	3.9	17,743	3.4	52,654	4.1
1,400.00–1,449.90	49,711	2.7	22,509	4.3	27,202	2.1
1,450.00–1,499.90	38,484	2.1	19,324	3.7	19,160	1.5
1,500.00 or more	119,345	6.6	84,286	16.1	35,059	2.7
Average benefit (dollars)	914.30		1,015.00		873.30	
Men	1,001,135	100.0	308,153	100.0	692,982	100.0
Less than 500.00	93,214	9.3	24,700	8.0	68,514	9.9
500.00–549.90	20,958	2.1	5,874	1.9	15,084	2.2
550.00–599.90	21,328	2.1	6,095	2.0	15,233	2.2
600.00–649.90	22,597	2.3	6,555	2.1	16,042	2.3
650.00–699.90	23,543	2.4	6,824	2.2	16,719	2.4
700.00–749.90	25,170	2.5	7,061	2.3	18,109	2.6
750.00–799.90	26,842	2.7	7,631	2.5	19,211	2.8
800.00–849.90	29,461	2.9	8,270	2.7	21,191	3.1
850.00–899.90	31,240	3.1	8,555	2.8	22,685	3.3
900.00–949.90	33,684	3.4	9,170	3.0	24,514	3.5
950.00–999.90	36,004	3.6	9,740	3.2	26,264	3.8
1,000.00–1,049.90	38,355	3.8	10,205	3.3	28,150	4.1
1,050.00–1,099.90	39,888	4.0	10,565	3.4	29,323	4.2
1,100.00–1,149.90	42,072	4.2	11,156	3.6	30,916	4.5
1,150.00–1,199.90	56,112	5.6	11,060	3.6	45,052	6.5
1,200.00–1,249.90	70,682	7.1	11,461	3.7	59,221	8.5
1,250.00–1,299.90	72,256	7.2	13,206	4.3	59,050	8.5
1,300.00–1,349.90	68,352	6.8	14,625	4.7	53,727	7.8
1,350.00–1,399.90	62,913	6.3	14,271	4.6	48,642	7.0
1,400.00–1,449.90	42,673	4.3	18,068	5.9	24,605	3.6
1,450.00–1,499.90	33,470	3.3	15,936	5.2	17,534	2.5
1,500.00 or more	110,321	11.0	77,125	25.0	33,196	4.8
Average benefit (dollars)	1,077.30		1,161.00		1,040.20	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2002—Continued

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	811,416	100.0	215,516	100.0	595,900	100.0
Less than 500.00	195,376	24.1	38,718	18.0	156,658	26.3
500.00–549.90	65,037	8.0	12,502	5.8	52,535	8.8
550.00–599.90	68,390	8.4	12,786	5.9	55,604	9.3
600.00–649.90	64,364	7.9	13,062	6.1	51,302	8.6
650.00–699.90	52,371	6.5	13,098	6.1	39,273	6.6
700.00–749.90	46,564	5.7	13,003	6.0	33,561	5.6
750.00–799.90	42,390	5.2	12,577	5.8	29,813	5.0
800.00–849.90	37,833	4.7	11,413	5.3	26,420	4.4
850.00–899.90	33,284	4.1	10,384	4.8	22,900	3.8
900.00–949.90	30,226	3.7	9,583	4.4	20,643	3.5
950.00–999.90	27,460	3.4	9,037	4.2	18,423	3.1
1,000.00–1,049.90	23,906	2.9	8,223	3.8	15,683	2.6
1,050.00–1,099.90	20,950	2.6	7,327	3.4	13,623	2.3
1,100.00–1,149.90	18,117	2.2	6,575	3.1	11,542	1.9
1,150.00–1,199.90	17,744	2.2	5,447	2.5	12,297	2.1
1,200.00–1,249.90	16,531	2.0	4,910	2.3	11,621	2.0
1,250.00–1,299.90	12,830	1.6	4,473	2.1	8,357	1.4
1,300.00–1,349.90	9,483	1.2	3,936	1.8	5,547	0.9
1,350.00–1,399.90	7,484	0.9	3,472	1.6	4,012	0.7
1,400.00–1,449.90	7,038	0.9	4,441	2.1	2,597	0.4
1,450.00–1,499.90	5,014	0.6	3,388	1.6	1,626	0.3
1,500.00 or more	9,024	1.1	7,161	3.3	1,863	0.3
Average benefit (dollars)	713.00		806.20		679.40	

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

NOTE: Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2002

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	1,812,551	100.0	523,669	100.0	1,288,882	100.0
Less than 500.00	231,652	12.8	68,300	13.0	163,352	12.7
500.00–549.90	55,894	3.1	20,128	3.8	35,766	2.8
550.00–599.90	76,083	4.2	20,113	3.8	55,970	4.3
600.00–649.90	72,411	4.0	19,869	3.8	52,542	4.1
650.00–699.90	70,106	3.9	19,964	3.8	50,142	3.9
700.00–749.90	67,189	3.7	19,731	3.8	47,458	3.7
750.00–799.90	65,697	3.6	19,737	3.8	45,960	3.6
800.00–849.90	63,363	3.5	19,414	3.7	43,949	3.4
850.00–899.90	62,523	3.4	19,342	3.7	43,181	3.4
900.00–949.90	59,986	3.3	18,609	3.6	41,377	3.2
950.00–999.90	58,495	3.2	18,188	3.5	40,307	3.1
1,000.00–1,049.90	57,042	3.1	17,859	3.4	39,183	3.0
1,050.00–1,099.90	55,642	3.1	17,287	3.3	38,355	3.0
1,100.00–1,149.90	54,792	3.0	16,872	3.2	37,920	2.9
1,150.00–1,199.90	53,176	2.9	16,051	3.1	37,125	2.9
1,200.00–1,249.90	52,312	2.9	15,895	3.0	36,417	2.8
1,250.00–1,299.90	53,107	2.9	17,026	3.3	36,081	2.8
1,300.00–1,349.90	53,895	3.0	18,673	3.6	35,222	2.7
1,350.00–1,399.90	53,003	2.9	17,926	3.4	35,077	2.7
1,400.00–1,449.90	64,004	3.5	22,558	4.3	41,446	3.2
1,450.00–1,499.90	64,995	3.6	19,075	3.6	45,920	3.6
1,500.00 or more	367,184	20.3	81,052	15.5	286,132	22.2
Average primary insurance amount (dollars)	1,026.50		1,000.00		1,037.30	
Men	1,001,135	100.0	308,153	100.0	692,982	100.0
Less than 500.00	71,453	7.1	25,582	8.3	45,871	6.6
500.00–549.90	14,479	1.4	6,058	2.0	8,421	1.2
550.00–599.90	18,183	1.8	6,092	2.0	12,091	1.7
600.00–649.90	18,421	1.8	6,439	2.1	11,982	1.7
650.00–699.90	19,140	1.9	6,817	2.2	12,323	1.8
700.00–749.90	19,743	2.0	7,053	2.3	12,690	1.8
750.00–799.90	20,877	2.1	7,623	2.5	13,254	1.9
800.00–849.90	22,145	2.2	8,051	2.6	14,094	2.0
850.00–899.90	23,980	2.4	8,762	2.8	15,218	2.2
900.00–949.90	25,399	2.5	9,208	3.0	16,191	2.3
950.00–999.90	26,882	2.7	9,615	3.1	17,267	2.5
1,000.00–1,049.90	28,895	2.9	10,257	3.3	18,638	2.7
1,050.00–1,099.90	30,634	3.1	10,602	3.4	20,032	2.9
1,100.00–1,149.90	32,797	3.3	11,069	3.6	21,728	3.1
1,150.00–1,199.90	34,057	3.4	11,116	3.6	22,941	3.3
1,200.00–1,249.90	35,400	3.5	11,542	3.7	23,858	3.4
1,250.00–1,299.90	38,018	3.8	13,087	4.2	24,931	3.6
1,300.00–1,349.90	40,638	4.1	14,985	4.9	25,653	3.7
1,350.00–1,399.90	41,113	4.1	14,650	4.8	26,463	3.8
1,400.00–1,449.90	51,333	5.1	18,396	6.0	32,937	4.8
1,450.00–1,499.90	53,886	5.4	15,955	5.2	37,931	5.5
1,500.00 or more	333,662	33.3	75,194	24.4	258,468	37.3
Average primary insurance amount (dollars)	1,219.70		1,154.10		1,248.90	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2002—Continued

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	811,416	100.0	215,516	100.0	595,900	100.0
Less than 500.00	160,199	19.7	42,718	19.8	117,481	19.7
500.00–549.90	41,415	5.1	14,070	6.5	27,345	4.6
550.00–599.90	57,900	7.1	14,021	6.5	43,879	7.4
600.00–649.90	53,990	6.7	13,430	6.2	40,560	6.8
650.00–699.90	50,966	6.3	13,147	6.1	37,819	6.3
700.00–749.90	47,446	5.8	12,678	5.9	34,768	5.8
750.00–799.90	44,820	5.5	12,114	5.6	32,706	5.5
800.00–849.90	41,218	5.1	11,363	5.3	29,855	5.0
850.00–899.90	38,543	4.8	10,580	4.9	27,963	4.7
900.00–949.90	34,587	4.3	9,401	4.4	25,186	4.2
950.00–999.90	31,613	3.9	8,573	4.0	23,040	3.9
1,000.00–1,049.90	28,147	3.5	7,602	3.5	20,545	3.4
1,050.00–1,099.90	25,008	3.1	6,685	3.1	18,323	3.1
1,100.00–1,149.90	21,995	2.7	5,803	2.7	16,192	2.7
1,150.00–1,199.90	19,119	2.4	4,935	2.3	14,184	2.4
1,200.00–1,249.90	16,912	2.1	4,353	2.0	12,559	2.1
1,250.00–1,299.90	15,089	1.9	3,939	1.8	11,150	1.9
1,300.00–1,349.90	13,257	1.6	3,688	1.7	9,569	1.6
1,350.00–1,399.90	11,890	1.5	3,276	1.5	8,614	1.4
1,400.00–1,449.90	12,671	1.6	4,162	1.9	8,509	1.4
1,450.00–1,499.90	11,109	1.4	3,120	1.4	7,989	1.3
1,500.00 or more	33,522	4.1	5,858	2.7	27,664	4.6
Average primary insurance amount (dollars)	788.10		779.60		791.20	

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

NOTE: Primary insurance amounts awarded before the December increase are converted to the December rates before computation of the percentages.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2002

Year	Number (thousands)	Average age	Percentage distribution by age ^a									
			Total, all ages	62	63	64	65			66–69	70–74	75 or older
							Total	Newly entitled	Disability conversions			
Men												
1940	117	68.1	100.0	...	...	...	17.1	17.1	...	58.8	16.5	7.6
1945	166	69.6	100.0	...	...	...	15.9	15.9	...	43.3	28.1	12.7
1950	444	68.7	100.0	...	...	...	21.9	21.9	...	47.3	21.0	9.8
1955	629	68.4	100.0	...	...	...	29.4	29.4	...	38.0	24.7	7.8
1960	630	66.8	100.0	...	...	...	48.1	42.3	5.8	36.6	13.2	2.1
1965	743	65.7	100.0	15.6	10.0	6.0	31.6	25.8	5.8	25.9	7.7	3.2
1970	814	64.4	100.0	19.0	12.8	8.5	48.7	39.6	9.1	9.3	1.3	0.4
1975	902	64.0	100.0	25.8	14.1	9.0	43.6	32.0	11.6	6.5	0.7	0.2
1980	942	63.9	100.0	30.1	13.1	8.5	42.4	31.8	10.6	5.2	0.6	0.1
1985	986	63.7	100.0	45.5	8.2	11.6	31.2	18.2	13.1	2.9	0.5	0.2
1986	1,011	63.7	100.0	47.0	8.2	11.8	29.2	17.2	12.0	3.1	0.6	0.1
1987	970	63.6	100.0	47.6	8.1	11.4	28.8	16.8	12.0	3.4	0.6	0.1
1988	944	63.7	100.0	48.2	8.1	9.9	28.6	16.6	12.0	4.1	0.9	0.2
1989	983	63.7	100.0	48.0	7.1	9.3	30.1	17.5	12.6	4.6	0.7	0.2
1990	964	63.7	100.0	47.2	7.6	11.3	27.6	16.4	11.1	5.1	1.0	0.2
1991	996	63.7	100.0	46.8	8.1	10.9	27.9	17.2	10.7	5.1	0.9	0.2
1992	989	63.7	100.0	48.2	7.3	11.4	27.2	16.6	10.6	5.0	0.8	0.1
1993	980	63.7	100.0	48.7	8.0	11.0	26.7	16.1	10.5	4.5	0.9	0.2
1994	923	63.6	100.0	49.0	7.4	11.4	27.1	15.7	11.5	4.0	1.0	0.1
1995	916	63.7	100.0	49.3	7.3	10.5	27.5	15.8	11.8	4.0	1.1	0.3
1996	895	63.6	100.0	49.9	7.1	9.7	27.6	14.9	12.6	4.5	1.1	0.1
1997 ^b	904	63.7	100.0	50.5	6.6	9.7	26.9	14.9	12.0	4.7	1.3	0.2
1998 ^b	909	63.8	100.0	49.6	7.1	9.9	27.3	14.7	12.6	4.6	1.3	0.2
1999 ^b	940	63.7	100.0	49.3	7.3	9.8	27.4	14.8	12.6	4.7	1.3	0.2
2000 ^b	1,115	64.1	100.0	41.6	6.1	9.4	31.7	20.3	11.4	9.9	1.1	0.2
2001 ^b	992	63.7	100.0	46.8	6.7	12.1	30.8	18.1	12.7	2.8	0.7	0.2
2002 ^b	1,001	63.7	100.0	46.4	7.1	13.8	29.7	17.1	12.6	2.1	0.7	0.2
Women												
1940	15	67.4	100.0	...	...	...	20.8	20.8	...	62.3	12.5	4.3
1945	20	68.5	100.0	...	...	...	24.0	24.0	...	45.0	23.6	7.3
1950	123	68.0	100.0	...	...	...	22.3	22.3	...	53.6	19.6	4.4
1955	281	67.8	100.0	...	...	...	36.6	36.6	...	38.7	18.1	6.6
1960	351	65.2	100.0	27.1	13.3	8.1	18.4	17.4	1.0	22.2	8.2	2.7
1965	440	65.3	100.0	32.6	12.1	6.0	19.9	16.9	3.0	17.4	6.7	5.4
1970	524	63.9	100.0	35.8	14.3	7.2	31.3	25.7	5.5	9.2	1.7	0.6
1975	603	63.7	100.0	41.6	13.7	7.0	29.3	22.0	7.3	6.8	1.2	0.4
1980	671	63.5	100.0	45.9	11.5	6.5	29.9	22.1	7.7	5.0	0.9	0.2
1985	697	63.4	100.0	57.9	7.4	9.8	21.3	12.2	9.1	2.6	0.8	0.2
1986	713	63.4	100.0	57.5	7.0	10.4	21.6	12.6	8.9	2.5	0.9	0.2
1987	681	63.3	100.0	58.9	7.2	9.6	20.8	11.8	9.0	2.6	0.7	0.2
1988	667	63.3	100.0	59.4	6.9	7.9	21.8	12.8	9.0	3.1	0.7	0.2
1989	674	63.4	100.0	57.9	6.5	9.4	21.6	12.8	8.8	3.3	1.0	0.3
1990	679	63.5	100.0	55.9	7.2	9.8	21.5	12.7	8.9	4.1	1.0	0.5
1991	685	63.5	100.0	56.1	7.1	9.5	22.3	13.9	8.4	3.8	0.9	0.3
1992	708	63.5	100.0	56.7	6.9	9.8	21.5	12.5	9.0	3.7	1.1	0.3
1993	704	63.5	100.0	56.0	6.8	10.2	22.4	13.6	8.8	3.1	1.1	0.3
1994	690	63.4	100.0	57.6	6.7	10.2	21.0	11.8	9.1	3.3	1.0	0.3
1995	684	63.5	100.0	55.4	6.6	10.1	22.6	12.8	9.7	3.5	1.4	0.4
1996	684	63.4	100.0	57.4	5.9	9.4	22.7	12.5	10.2	3.4	1.0	0.3
1997 ^b	809	65.4	100.0	48.2	5.5	7.5	19.5	10.5	8.9	4.4	6.4	8.5
1998 ^b	733	64.0	100.0	53.1	7.0	8.9	22.0	12.4	9.6	4.1	2.4	2.5
1999 ^b	737	63.6	100.0	55.1	6.8	9.2	22.6	12.5	10.1	3.8	1.8	0.7
2000 ^b	854	63.8	100.0	52.2	5.9	9.3	23.6	13.9	9.7	6.5	2.2	0.4
2001 ^b	795	63.7	100.0	51.3	7.1	11.5	23.7	12.8	10.9	3.1	2.6	0.6
2002 ^b	811	63.6	100.0	52.9	6.6	12.2	23.9	12.7	11.2	2.3	1.8	0.3

a. Age in year of award for 1940–1980. Age in month of award for 1985–2002.

b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2002

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	750,003	100.0	406,336	100.0	343,667	100.0
Less than 100.00	6,389	0.9	3,528	0.9	2,861	0.8
100.00–149.90	3,750	0.5	1,463	0.4	2,287	0.7
150.00–199.90	8,881	1.2	3,492	0.9	5,389	1.6
200.00–249.90	13,109	1.8	5,021	1.2	8,088	2.4
250.00–299.90	14,344	1.9	5,374	1.3	8,970	2.6
300.00–349.90	16,040	2.1	5,908	1.5	10,132	3.0
350.00–399.90	15,980	2.1	5,737	1.4	10,243	3.0
400.00–449.90	16,316	2.2	5,991	1.5	10,325	3.0
450.00–499.90	18,845	2.5	6,861	1.7	11,984	3.5
500.00–549.90	32,643	4.4	11,545	2.8	21,098	6.1
550.00–599.90	42,319	5.6	15,107	3.7	27,212	7.9
600.00–649.90	42,475	5.7	16,340	4.0	26,135	7.6
650.00–699.90	40,176	5.4	16,173	4.0	24,003	7.0
700.00–749.90	38,422	5.1	16,248	4.0	22,174	6.5
750.00–799.90	36,242	4.8	16,604	4.1	19,638	5.7
800.00–849.90	34,898	4.7	16,883	4.2	18,015	5.2
850.00–899.90	32,547	4.3	16,554	4.1	15,993	4.7
900.00–949.90	30,569	4.1	16,315	4.0	14,254	4.2
950.00–999.90	28,543	3.8	16,016	3.9	12,527	3.7
1,000.00–1,049.90	26,059	3.5	15,468	3.8	10,591	3.1
1,050.00–1,099.90	24,453	3.3	15,287	3.8	9,166	2.7
1,100.00–1,149.90	22,818	3.0	14,832	3.7	7,986	2.3
1,150.00–1,199.90	20,575	2.7	14,015	3.5	6,560	1.9
1,200.00–1,249.90	19,158	2.6	13,438	3.3	5,720	1.7
1,250.00–1,299.90	17,783	2.4	12,809	3.2	4,974	1.5
1,300.00–1,349.90	16,418	2.2	12,050	3.0	4,368	1.3
1,350.00–1,399.90	15,052	2.0	11,343	2.8	3,709	1.1
1,400.00–1,449.90	15,697	2.1	12,090	3.0	3,607	1.1
1,450.00–1,499.90	19,669	2.6	15,505	3.8	4,164	1.2
1,500.00 or more	79,833	10.6	68,339	16.8	11,494	3.3
Average benefit (dollars)	898.10		1,020.10		753.90	

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

NOTE: Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2002

Year	Number	Average age	Percentage distribution, by age ^a									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 ^b
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	0.8	7.0	6.5	10.5	16.7	20.0	11.8	21.3	5.4
1965	186,808	53.0	100.0	1.8	8.2	7.9	11.1	17.1	25.7	14.0	13.0	1.0
1970	258,072	52.1	100.0	6.7	7.6	6.5	10.1	14.7	23.5	12.3	16.1	2.6
1975	408,531	51.5	100.0	7.7	8.6	6.2	9.5	15.7	23.1	12.1	14.6	2.5
1980	275,185	51.2	100.0	8.3	9.7	6.0	8.4	14.7	24.6	12.3	14.2	1.8
1981	244,984	50.8	100.0	8.6	10.2	6.2	8.4	14.5	24.3	13.0	13.1	1.7
1982	207,453	50.9	100.0	8.4	10.4	6.3	8.4	14.1	24.6	12.9	13.6	1.2
1983	217,422	50.2	100.0	9.5	11.7	6.6	8.4	13.6	23.4	12.2	13.3	1.3
1984	247,833	50.0	100.0	9.2	12.8	7.1	8.7	13.4	22.6	12.2	12.7	1.3
1985	274,400	50.1	100.0	8.7	13.3	7.0	9.9	14.6	23.1	12.4	10.6	0.3
1986	273,700	48.7	100.0	10.7	15.3	8.1	9.4	14.3	21.3	11.1	9.5	0.3
1987	265,900	49.0	100.0	9.4	16.0	8.6	9.3	13.9	20.8	10.9	11.0	0.2
1988	265,700	49.2	100.0	8.4	16.0	9.7	9.0	14.6	21.3	10.5	10.2	0.2
1989	268,600	49.0	100.0	8.7	16.0	9.5	10.2	14.2	20.6	9.7	10.8	0.3
1990	293,300	48.1	100.0	10.9	16.9	9.4	9.5	13.5	20.5	10.3	8.8	0.1
1991	322,700	47.9	100.0	9.5	17.7	10.6	11.0	14.1	18.4	9.4	9.1	0.2
1992	395,600	47.8	100.0	9.5	18.5	10.8	11.0	13.0	18.6	9.8	8.7	0.2
1993	391,800	47.7	100.0	9.2	18.9	10.1	11.7	14.7	18.8	8.6	7.8	0.2
1994	379,300	48.4	100.0	6.8	18.4	10.8	12.7	15.4	19.3	9.0	7.6	0.1
1995	368,400	48.9	100.0	7.2	16.3	10.7	11.5	15.7	20.4	8.9	9.1	0.2
1996	347,100	48.7	100.0	6.9	16.2	10.8	13.2	16.2	19.9	9.3	7.5	0.1
1997	311,100	49.3	100.0	6.3	14.6	10.8	13.5	16.1	21.6	8.8	8.2	0.1
1998	331,400	49.2	100.0	6.3	14.3	11.1	12.4	18.3	21.6	8.1	7.8	0.2
1999	338,900	49.6	100.0	6.2	13.1	11.4	12.4	18.3	21.7	8.8	8.0	0.3
2000	329,800	49.6	100.0	6.8	12.9	10.7	12.7	17.7	21.0	9.1	8.8	0.2
2001	364,500	49.4	100.0	7.5	13.2	9.9	12.2	17.4	22.6	9.2	7.9	0.1
2002	406,336	49.4	100.0	7.8	12.0	10.3	12.7	17.5	22.5	9.2	7.9	0.1
Women												
1957	30,426	57.4	100.0	...	...	...	...	25.5	38.9	19.8	15.3	0.5
1958	24,379	57.2	100.0	...	...	...	...	28.6	37.2	17.8	15.2	1.2
1959	31,264	57.0	100.0	...	...	...	...	30.2	36.9	17.6	14.2	1.1
1960	39,339	52.5	100.0	0.7	8.1	8.0	13.3	21.9	24.6	12.4	10.1	0.8
1965	66,691	53.2	100.0	1.1	6.5	7.4	11.7	19.3	28.3	14.1	10.9	0.6
1970	92,312	52.8	100.0	4.2	6.3	6.1	11.0	17.5	27.2	13.0	12.9	1.7
1975	183,518	52.1	100.0	6.1	7.3	6.1	10.1	17.7	25.5	12.2	12.9	2.1
1980	121,374	51.1	100.0	7.4	9.7	6.4	9.3	16.3	25.5	11.7	12.2	1.5
1981	106,863	50.8	100.0	7.8	10.2	6.5	9.5	16.4	25.1	12.0	11.1	1.4
1982	89,678	50.5	100.0	8.0	10.9	6.8	9.5	15.6	24.9	11.7	11.4	1.1
1983	94,127	49.8	100.0	9.0	12.2	7.4	9.5	14.8	23.5	10.9	11.6	1.1
1984	114,165	49.7	100.0	8.3	13.2	7.9	9.7	14.9	22.8	10.9	11.7	1.2
1985	134,500	49.7	100.0	8.6	12.9	8.0	10.6	15.8	23.3	10.1	10.5	0.1
1986	135,700	48.8	100.0	9.0	15.5	10.4	10.5	14.8	21.3	9.6	8.6	0.2
1987	143,700	49.5	100.0	7.5	15.2	8.1	11.2	15.8	23.4	9.6	8.8	0.3
1988	147,000	49.3	100.0	8.5	14.0	8.8	10.9	16.1	23.5	10.5	7.4	0.3
1989	146,900	49.1	100.0	7.8	14.8	10.4	11.9	13.8	21.2	10.8	8.9	0.3
1990	168,500	48.4	100.0	8.5	16.3	9.8	13.1	14.2	22.3	8.9	6.5	0.4
1991	190,400	48.4	100.0	8.5	16.8	10.1	12.2	16.2	19.5	8.9	7.4	0.4
1992	241,300	47.7	100.0	8.6	17.7	12.0	12.4	15.6	17.6	8.4	7.5	0.2
1993	237,900	48.1	100.0	7.5	17.5	11.2	13.1	16.5	19.7	6.8	7.4	0.2
1994	234,000	48.2	100.0	7.4	16.9	11.1	12.9	17.0	20.8	7.3	6.4	0.2
1995	263,200	48.5	100.0	6.4	16.7	11.4	13.8	17.2	20.5	7.6	6.3	0.1
1996	256,900	49.1	100.0	5.3	15.1	11.3	14.0	19.0	21.2	8.3	5.8	0.1
1997	250,200	48.4	100.0	6.2	16.3	12.2	14.1	19.0	19.0	6.8	6.2	0.2
1998	271,900	48.9	100.0	5.4	14.9	12.2	14.5	19.1	20.4	7.6	5.7	0.2
1999	266,900	48.7	100.0	5.7	14.6	12.5	15.3	18.2	20.6	6.6	6.2	0.3
2000	282,400	49.2	100.0	5.8	13.7	12.3	13.5	18.7	21.6	8.1	6.1	0.2
2001	304,800	48.4	100.0	7.9	14.0	12.1	13.8	18.5	20.1	7.6	5.9	0.1
2002	343,667	48.7	100.0	7.3	13.4	11.6	14.3	18.4	21.0	7.7	6.3	0.1

a. Age in year of award for 1957–1984. Age in month of award for 1985–2002.

b. Includes awards processed after attainment of age 65.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C3—Number and percentage distribution, by diagnostic group, sex, and age, 2002

Diagnostic group ^a	Total				Men				Women			
	All ages	Under 35	35–49	50 or older	All ages	Under 35	35–49	50 or older	All ages	Under 35	35–49	50 or older
	Number											
Total	750,003	90,550	233,018	426,435	406,336	49,196	119,418	237,722	343,667	41,354	113,600	188,713
Congenital anomalies	1,163	489	320	354	610	256	169	185	553	233	151	169
Endocrine, nutritional, and metabolic diseases	26,737	2,075	7,772	16,890	13,493	964	3,681	8,848	13,244	1,111	4,091	8,042
Infectious and parasitic diseases ^b	11,289	1,785	6,002	3,502	8,238	1,287	4,656	2,295	3,051	498	1,346	1,207
Injuries	30,893	4,842	10,183	15,868	20,103	3,485	6,755	9,863	10,790	1,357	3,428	6,005
Mental disorders												
Retardation	23,206	12,865	7,403	2,938	14,335	7,782	4,684	1,869	8,871	5,083	2,719	1,069
Other	167,375	37,945	71,882	57,548	79,094	19,908	31,776	27,410	88,281	18,037	40,106	30,138
Neoplasms	73,086	4,107	19,593	49,386	38,440	2,124	9,128	27,188	34,646	1,983	10,465	22,198
Diseases of the—												
Blood and blood-forming organs	2,635	750	781	1,104	1,304	328	386	590	1,331	422	395	514
Circulatory system	86,574	2,162	15,702	68,710	59,303	1,227	9,873	48,203	27,271	935	5,829	20,507
Digestive system	16,790	1,117	6,951	8,722	10,498	504	4,366	5,628	6,292	613	2,585	3,094
Genitourinary system	16,542	2,451	5,965	8,126	10,105	1,344	3,730	5,031	6,437	1,107	2,235	3,095
Musculoskeletal system and connective tissue	190,539	7,509	51,161	131,869	96,909	3,574	26,254	67,081	93,630	3,935	24,907	64,788
Nervous system and sense organs	63,069	10,009	21,179	31,881	32,872	5,179	10,340	17,353	30,197	4,830	10,839	14,528
Respiratory system	30,880	762	5,169	24,949	16,341	272	2,247	13,822	14,539	490	2,922	11,127
Skin and subcutaneous tissue	1,653	220	639	794	715	82	282	351	938	138	357	443
Other	5,873	1,012	1,696	3,165	3,069	616	787	1,666	2,804	396	909	1,499
Unknown	1,699	450	620	629	907	264	304	339	792	186	316	290
	Percent											
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	0.2	0.5	0.1	0.1	0.2	0.5	0.1	0.1	0.2	0.6	0.1	0.1
Endocrine, nutritional, and metabolic diseases	3.6	2.3	3.3	4.0	3.3	2.0	3.1	3.7	3.9	2.7	3.6	4.3
Infectious and parasitic diseases ^b	1.5	2.0	2.6	0.8	2.0	2.6	3.9	1.0	0.9	1.2	1.2	0.6
Injuries	4.1	5.4	4.4	3.7	4.9	7.1	5.7	4.2	3.1	3.3	3.0	3.2
Mental disorders												
Retardation	3.1	14.2	3.2	0.7	3.5	15.8	3.9	0.8	2.6	12.3	2.4	0.6
Other	22.3	41.9	30.8	13.5	19.5	40.4	26.6	11.5	25.7	43.6	35.3	16.0
Neoplasms	9.8	4.6	8.4	11.6	9.5	4.3	7.6	11.4	10.1	4.8	9.2	11.8
Diseases of the—												
Blood and blood-forming organs	0.4	0.8	0.3	0.3	0.3	0.7	0.3	0.3	0.4	1.0	0.3	0.3
Circulatory system	11.5	2.4	6.7	16.1	14.6	2.5	8.3	20.3	7.9	2.3	5.1	10.9
Digestive system	2.2	1.2	3.0	2.0	2.6	1.0	3.7	2.4	1.8	1.5	2.3	1.6
Genitourinary system	2.2	2.7	2.6	1.9	2.5	2.7	3.1	2.1	1.9	2.7	2.0	1.6
Musculoskeletal system and connective tissue	25.4	8.3	22.0	30.9	23.8	7.3	22.0	28.2	27.2	9.5	21.9	34.3
Nervous system and sense organs	8.4	11.1	9.1	7.5	8.1	10.5	8.6	7.3	8.8	11.7	9.6	7.7
Respiratory system	4.1	0.9	2.2	5.9	4.0	0.6	1.9	5.8	4.2	1.2	2.6	5.9
Skin and subcutaneous tissue	0.2	0.2	0.3	0.2	0.2	0.2	0.2	0.1	0.3	0.3	0.3	0.2
Other	0.8	1.1	0.7	0.7	0.8	1.3	0.7	0.7	0.8	0.9	0.8	0.8
Unknown	0.2	0.5	0.3	0.1	0.2	0.5	0.3	0.1	0.2	0.4	0.3	0.1

a. Classification based on impairment codes established by SSA.

b. Effective 1999, the Listing of Impairments (which describes medical conditions and specific findings that SSA considers severe enough to show that an individual is disabled without having to consider the remaining steps of the sequential evaluation process) was changed to eliminate awards based solely on obesity.

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

CONTACT: Terry Dodson (410) 965-0143.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C7—Number of applications, awards, ratio of awards to applications, and awards per 1,000 insured workers, selected years, 1960–2002

Year	Number (thousands)		Awards as a percentage of applications	Awards per 1,000 insured workers
	Applications	Awards		
1960	418.6	207.8	49.6	4.5
1965	529.3	253.5	47.9	4.7
1966	544.5	278.3	51.1	5.1
1967	573.2	301.4	52.6	5.4
1968	719.8	323.2	44.9	5.7
1969	725.2	344.7	47.5	4.9
1970	869.8	350.4	40.3	4.8
1971	923.9	415.9	45.0	5.6
1972	947.5	455.4	48.1	6.0
1973	1,067.5	491.6	46.1	6.3
1974	1,330.2	536.0	40.3	6.7
1975	1,285.3	592.0	46.1	7.1
1976	1,232.2	551.5	44.8	6.5
1977	1,235.2	568.9	46.1	6.5
1978	1,184.7	464.4	39.2	5.2
1979	1,187.8	416.7	35.1	4.4
1980	1,262.3	396.6	31.4	4.0
1981	1,161.2	351.8	30.3	3.4
1982	1,019.8	297.1	29.1	2.9
1983	1,019.3	311.5	30.6	3.0
1984	1,036.7	362.0	34.9	3.4
1985	1,066.2	377.4	35.4	3.5
1986	1,118.4	416.9	37.3	3.8
1987	1,108.9	415.8	37.5	3.7
1988	1,017.9	409.5	40.2	3.6
1989	984.9	425.6	43.2	3.7
1990	1,067.7	468.0	43.8	4.0
1991	1,208.7	536.4	44.4	4.5
1992	1,335.1	636.6	47.7	5.2
1993	1,425.8	635.2	44.6	5.2
1994	1,443.8	631.9	43.8	5.1
1995	1,338.1	645.6	48.3	5.1
1996	1,279.2	624.3	48.8	4.9
1997	1,180.2	587.7	49.8	4.5
1998	1,169.3	608.4	52.0	4.6
1999	1,200.1	620.6	51.7	4.6
2000	1,330.6	621.3	46.7	4.5
2001	1,498.6	690.5	46.1	5.0
2002	1,682.5	750.0	44.6	5.3

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

CONTACT: Jeff Kunkel (410) 965-3013.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2002

Year	Total	Wives with entitlement based on—		Husbands
		Care of children	Age	
<i>Wives and husbands of retired workers</i>				
1950	162,768	9,646	152,310	812
1955	288,915	21,692	263,816	3,407
1960	339,987	32,254	305,713	2,020
1965	321,015	44,087	275,717	1,211
1970	339,447	51,378	286,867	1,202
1975	350,558	60,184	289,600	774
1980	360,693	55,401	294,892	10,400
1981	338,540	50,993	277,641	9,906
1982	349,967	36,229	302,739	10,999
1983	356,274	35,309	308,922	12,043
1984	342,691	30,972	298,855	12,864
1985	356,558	30,454	312,849	13,255
1986	358,115	28,925	315,427	13,763
1987	333,333	26,099	294,499	12,735
1988	316,929	23,045	281,760	12,124
1989	310,498	21,285	278,655	10,558
1990	308,980	21,395	277,238	10,347
1991	307,000	21,154	276,236	9,610
1992	304,764	21,057	274,670	9,037
1993	290,728	19,945	262,240	8,543
1994	275,025	18,431	248,430	8,164
1995	258,740	17,214	233,731	7,795
1996	244,014	15,466	221,059	7,489
1997	268,012	14,040	246,229	7,743
1998	263,668	13,472	242,390	7,806
1999	275,568	13,521	253,559	8,488
2000	341,503	15,625	315,148	10,730
2001	314,547	13,743	289,757	11,047
2002	317,685	14,011	291,377	12,297
<i>Wives and husbands of disabled workers</i>				
1958 ^a	12,920	7,869	5,035	16
1959 ^b	54,299	32,844	21,301	154
1960	54,187	38,326	15,756	105
1965	69,183	55,230	13,813	140
1970	96,304	74,913	21,227	164
1975	148,741	116,624	31,942	175
1980	108,500	74,922	32,616	962
1981	95,575	64,333	30,360	882
1982	77,835	45,463	31,540	832
1983	80,079	43,820	35,369	890
1984	81,834	46,433	34,470	931
1985	83,511	48,522	34,101	888
1986	82,435	47,711	33,797	927
1987	77,316	43,881	31,652	1,783
1988	73,790	41,627	29,634	2,529
1989	69,113	39,212	27,750	2,151
1990	69,667	40,458	27,023	2,186
1991	72,754	43,543	26,747	2,464
1992	78,083	47,841	27,502	2,740
1993	74,605	45,602	26,276	2,727
1994	69,549	42,824	24,240	2,485
1995	63,097	37,972	22,833	2,292
1996	57,528	33,638	21,775	2,115
1997	50,818	25,779	23,329	1,710
1998	47,550	23,190	22,693	1,667
1999	46,164	21,949	22,557	1,658
2000	43,941	19,801	22,399	1,741
2001	43,412	19,535	21,979	1,898
2002	45,600	20,621	22,863	2,116

a. January–November.

b. Includes December 1958.

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

NOTE: Benefits not necessarily payable at time of award.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D3—Number and average monthly benefit for wives and husbands, by basis of entitlement, age in month of award, and sex, 2002

Basis of entitlement and age	Wives						Husbands	
	Total		Of retired workers		Of disabled workers			
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
All wives and husbands	348,872	334.70	305,388	349.30	43,484	232.40	14,413	225.80
	By age							
Entitlement based on care of children	34,632	247.90	14,011	360.00	20,621	171.70	1,056	139.10
Under 35	6,454	138.50	572	324.80	5,882	120.30	170	105.80
35–39	5,372	183.40	1,025	314.50	4,347	152.50	210	118.20
40–44	6,340	232.40	1,914	345.90	4,426	183.30	248	129.70
45–49	5,621	276.60	2,474	358.20	3,147	212.50	222	166.20
50–54	4,421	316.00	2,630	371.80	1,791	234.10	109	169.30
55–59	3,349	356.40	2,572	385.20	777	260.90	59	167.70
60–61	1,344	415.80	1,209	429.10	135	296.30	19	192.80
62–64	1,731	305.30	1,615	309.80	116	242.40	19	157.20
Entitlement based on age	314,240	344.30	291,377	348.80	22,863	287.10	13,357	232.70
62–64	233,470	337.40	213,678	342.80	19,792	279.70	3,308	209.00
62	147,550	331.10	131,480	338.10	16,070	274.20	1,254	175.00
63	38,640	326.00	36,564	327.90	2,076	291.40	735	201.20
64	47,280	366.60	45,634	368.30	1,646	318.60	1,319	245.60
65–69	67,396	371.60	64,832	372.90	2,564	337.70	6,332	251.40
65	40,744	395.00	39,425	396.80	1,319	340.40	2,468	283.20
66	10,812	343.50	10,322	343.30	490	345.70	1,160	239.00
67	7,190	332.00	6,851	332.20	339	328.40	1,034	217.40
68	4,986	328.40	4,754	328.50	232	326.70	926	233.80
69	3,664	330.00	3,480	330.10	184	327.40	744	234.40
70–74	9,295	322.50	8,896	322.70	399	316.70	2,397	221.00
75 or older	4,079	334.90	3,971	335.20	108	322.10	1,320	223.50
	By sex							
Wives								
Not divorced	316,299	337.20	275,409	353.10	40,890	230.20	...	...
Divorced	32,573	310.20	29,979	314.10	2,594	265.70	...	...
Husbands of—								
Retired workers	...	...	...	...	...	...	12,297	237.00
Disabled workers	...	...	...	...	...	...	2,116	160.90

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

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

NOTE: ... = not applicable.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2002

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
<i>Total</i>				
1957	313,163	81,842	231,321	...
1960	415,719	69,979	241,430	104,310
1965	783,202	134,187	451,399	197,616
1970	1,090,865	182,595	591,724	316,546
1975	1,331,913	225,579	591,118	515,216
1976	1,327,197	236,805	578,905	511,487
1977	1,365,513	259,447	587,589	518,477
1978	1,234,658	214,284	566,992	453,382
1979	1,191,521	247,800	544,549	399,172
1980	1,174,112	248,658	540,246	385,208
1981	1,086,547	211,406	535,487	339,654
1982	916,715	182,849	473,396	260,470
1983	752,839	144,945	380,992	226,895
1984	721,564	131,986	351,326	238,252
1985	713,632	128,076	332,531	253,025
1986	700,627	122,652	319,800	258,167
1987	685,299	117,984	310,573	256,742
1988	706,031	116,659	324,346	265,026
1989	675,362	106,491	307,484	261,387
1990	695,307	108,105	303,616	283,586
1991	726,908	107,261	301,459	318,188
1992	794,571	108,686	304,300	381,585
1993	816,454	106,566	311,290	398,598
1994	824,239	102,983	310,051	411,205
1995	808,578	101,239	306,044	401,295
1996	798,485	98,655	302,480	397,350
1997	757,346	97,594	297,204	362,548
1998	763,170	96,893	294,851	371,426
1999	773,166	99,826	295,196	378,144
2000	776,676	115,358	297,686	363,632
2001	796,174	110,680	302,445	383,049
2002	846,361	116,186	310,395	419,780
<i>Children under age 18</i>				
1940	59,382	8,249	51,133	...
1945	127,514	7,215	120,299	...
1950	122,641	25,495	97,146	...
1955	238,795	40,402	198,393	...
1960	391,366	57,239	231,611	102,516
1965	523,453	84,707	263,637	175,109
1970	678,940	99,353	337,960	241,627
1975	806,770	115,347	300,139	391,284
1980	573,828	111,610	227,139	235,079
1981	512,939	84,793	228,317	199,829
1982	457,445	81,502	222,738	153,205
1983	444,467	80,117	211,396	152,954
1984	449,242	74,328	202,163	172,721
1985	464,908	74,128	200,576	190,204
1986	465,115	70,915	196,008	198,192
1987	451,370	66,672	184,668	195,030
1988	452,519	63,586	192,278	196,655
1989	446,308	59,073	189,285	197,950
1990	468,439	60,588	189,792	218,059
1991	502,442	60,618	191,537	250,287
1992	559,725	61,034	192,689	306,002
1993	575,247	59,515	198,469	317,263
1994	586,342	57,677	201,598	327,067
1995	571,650	57,215	198,848	315,587
1996	561,687	56,126	194,333	311,228
1997	517,118	54,841	184,237	278,040
1998	516,100	54,218	182,118	279,764
1999	522,946	57,019	182,159	283,768
2000	525,390	68,440	184,762	272,188
2001	542,147	64,207	188,300	289,640
2002	578,906	66,992	192,226	319,688

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2002—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
Disabled adult children				
1957	29,507	17,249	12,258	...
1960	24,353	12,740	9,819	1,794
1965	21,398	10,017	8,668	2,713
1970	24,547	11,348	9,425	3,774
1975	32,707	14,636	11,182	6,889
1976	34,517	15,602	11,546	7,369
1977	36,210	^a	^a	7,885
1978	33,611	15,378	11,013	7,220
1979	33,419	15,967	10,999	6,453
1980	33,470	16,650	10,626	6,194
1981	30,545	15,365	9,745	5,435
1982	28,707	14,772	9,685	4,250
1983	33,639	17,309	11,223	5,107
1984	36,427	18,330	12,556	5,541
1985	39,083	19,661	12,709	6,713
1986	40,525	20,295	13,244	6,986
1987	39,665	20,761	12,117	6,787
1988	38,702	20,544	11,512	6,646
1989	37,001	19,668	10,975	6,358
1990	38,772	20,862	11,277	6,633
1991	41,086	21,850	11,684	7,552
1992	47,009	23,615	13,846	9,548
1993	47,246	23,173	13,819	10,254
1994	44,483	22,119	12,590	9,774
1995	43,275	21,566	11,930	9,779
1996	40,583	20,169	11,061	9,353
1997	38,701	19,611	10,616	8,474
1998	39,941	19,932	10,914	9,095
1999	41,748	20,467	11,430	9,851
2000	43,845	22,567	11,621	9,657
2001	43,042	21,307	11,872	9,863
2002	46,636	22,881	12,685	11,070
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	^a	^a	148,227
1978	544,396	105,719	291,434	147,243
1979	553,889	117,118	292,766	144,005
1980	566,814	120,398	302,481	143,935
1981	543,063	111,248	297,425	134,390
1982	430,563	86,575	240,973	103,015
1983	274,726	47,519	158,373	68,834
1984	235,895	39,328	136,577	59,990
1985	209,641	34,287	119,246	56,108
1986	194,987	31,442	110,556	52,989
1987	194,264	30,551	108,788	54,925
1988	214,810	32,529	120,556	61,725
1989	192,053	27,750	107,224	57,079
1990	188,096	26,655	102,547	58,894
1991	183,380	24,793	98,238	60,349
1992	187,837	24,037	97,765	66,035
1993	193,961	23,878	99,002	71,081
1994	193,414	23,187	95,863	74,364
1995	193,653	22,458	95,266	75,929
1996	196,215	22,360	97,086	76,769
1997	201,527	23,142	102,351	76,034
1998	207,129	22,743	101,819	82,567
1999	208,472	22,340	101,607	84,525
2000	207,441	24,351	101,303	81,787
2001	210,985	25,166	102,273	83,546
2002	220,819	26,313	105,484	89,022

a. Data not available.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D5—Number and average monthly benefit for children, by type of benefit and age in month of award, 2002

Age	Total number	Children of—					
		Retired workers		Deceased workers		Disabled workers	
		Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
All children							
Total	846,361	116,186	408.50	310,395	605.10	419,780	238.90
Children under age 18							
Subtotal	578,906	66,992	395.50	192,226	580.40	319,688	212.00
Under 1	20,479	1,080	362.00	4,417	533.90	14,982	176.70
1	15,558	689	372.90	5,028	517.80	9,841	167.50
2	16,768	903	370.80	5,741	523.00	10,124	169.00
3	18,246	1,037	348.20	6,403	540.70	10,806	170.90
4	19,742	1,315	355.90	6,884	539.20	11,543	172.60
5	20,984	1,563	356.30	7,271	545.70	12,150	174.70
6	23,187	1,780	362.10	7,949	552.30	13,458	177.20
7	25,457	2,199	366.40	8,739	551.70	14,519	185.80
8	27,699	2,535	353.10	9,685	555.60	15,479	189.30
9	30,947	3,182	355.50	10,657	552.40	17,108	191.30
10	33,818	3,573	361.00	11,753	561.70	18,492	196.90
11	37,352	4,255	369.00	12,903	571.50	20,194	202.50
12	40,602	5,045	374.70	13,929	586.20	21,628	209.80
13	42,448	5,753	380.10	14,472	590.30	22,223	219.30
14	45,196	6,487	397.20	15,474	604.80	23,235	228.70
15	46,690	7,348	404.40	15,715	613.00	23,627	244.50
16	50,040	8,432	442.60	16,711	638.30	24,897	273.10
17	63,693	9,816	451.60	18,495	629.10	35,382	267.70
Disabled adult children							
Subtotal	46,636	22,881	374.50	12,685	563.40	11,070	283.90
Under 20	7,271	1,135	394.90	2,825	539.20	3,311	254.20
20–24	9,734	2,456	393.30	3,490	549.80	3,788	267.90
25–29	6,306	3,053	394.70	1,657	597.30	1,596	309.00
30–34	7,356	4,638	397.10	1,459	610.20	1,259	326.20
35–39	7,977	5,904	383.50	1,247	592.10	826	351.00
40 or older	7,992	5,695	323.80	2,007	541.40	290	319.00
Students aged 18–19							
Subtotal	220,819	26,313	471.00	105,484	655.10	89,022	330.10
18	206,967	25,363	475.10	102,110	657.30	79,494	336.60
19	13,852	950	362.30	3,374	588.80	9,528	276.20

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2002

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Subtotal	With at least 1 child under age 16 ^a	Entitled solely because of at least 1 disabled child ^b	
1950	41,101	41,101	...	41,089	41,089	...	12
1951	78,323	78,323	...	78,181	78,181	...	142
1952	64,875	64,875	...	64,776	64,776	...	99
1953	71,945	71,945	...	71,861	71,861	...	84
1954	70,775	70,775	...	70,699	70,699	...	76
1955	76,018	76,018	...	75,927	75,927	...	91
1956	67,475	67,475	...	67,410	67,410	...	65
1957	88,174	88,174	...	88,102	86,088	2,014	72
1958 ^c	81,467	81,467	...	81,392	80,130	1,262	75
1959 ^d	102,020	102,020	...	101,933	100,234	1,699	87
1960	92,607	92,607	...	92,507	90,939	1,568	100
1961	98,449	98,449	...	98,374	96,778	1,596	75
1962	99,925	99,925	...	99,835	98,099	1,736	90
1963	104,960	104,960	...	104,866	102,828	2,038	94
1964	106,249	106,249	...	106,137	103,778	2,359	112
1965	100,005	100,005	...	99,804	97,972	1,832	201
1966	107,135	107,135	...	106,677	105,270	1,407	458
1967	110,762	110,762	...	110,283	108,842	1,441	479
1968	113,765	113,765	...	113,323	111,869	1,454	442
1969	116,922	116,922	...	116,434	115,035	1,399	488
1970	112,377	112,377	...	111,887	110,459	1,428	490
1971	116,548	116,548	...	115,996	114,266	1,730	552
1972	117,699	117,699	...	117,034	113,822	3,212	665
1973	118,775	118,775	...	112,511	109,574	2,937	6,264
1974	109,221	109,221	...	102,584	99,705	2,879	6,637
1975	116,224	111,372	4,852	108,002	103,597	4,405	8,222
1976	113,520	107,339	6,181	105,158	99,781	5,377	8,362
1977	118,821	111,473	7,348	109,050	103,492	5,558	9,771
1978	110,015	103,391	6,624	100,247	96,834	3,413	9,768
1979	110,424	103,805	6,619	99,413	96,249	3,164	11,011
1980	107,809	99,922	7,887	96,005	92,768	3,237	11,804
1981	99,653	92,138	7,515	81,079	78,069	3,010	11,059
1982	86,786	80,198	6,588	70,019	67,301	2,718	10,179
1983	82,464	76,271	6,193	66,711	63,304	3,407	9,560
1984	73,794	68,164	5,630	59,256	54,962	4,294	8,908
1985	72,241	66,992	5,249	62,881	58,507	4,374	9,360
1986	69,340	64,147	5,193	60,200	55,639	4,561	9,140
1987	64,777	59,626	5,151	56,329	52,051	4,278	8,448
1988	62,676	57,859	4,817	54,833	50,655	4,178	7,843
1989	59,525	54,916	4,609	51,992	48,226	3,766	7,533
1990	58,060	53,346	4,714	50,879	47,673	3,206	7,181
1991	57,896	52,889	5,007	50,787	47,695	3,092	7,109
1992	56,402	51,273	5,129	49,341	46,302	3,039	7,061
1993	56,408	51,358	5,050	49,465	46,420	3,045	6,943
1994	54,732	49,825	4,907	48,217	45,346	2,871	6,515
1995	51,645	46,874	4,771	45,368	42,817	2,551	6,277
1996	49,150	44,732	4,418	43,538	41,192	2,346	5,612
1997	43,504	39,805	3,699	38,565	36,396	2,169	4,939
1998	42,395	38,533	3,862	37,739	35,577	2,162	4,656
1999	41,756	37,926	3,830	37,271	35,092	2,179	4,485
2000	40,491	36,521	3,970	36,197	34,241	1,956	4,294
2001	41,323	37,106	4,217	36,728	34,753	1,975	4,595
2002	40,829	36,534	4,295	36,186	34,264	1,922	4,643

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. January–November.
- d. Includes December 1958.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D7—Number and average monthly benefit for widow(er)s, by age in month of award and sex, 2002

Age, sex, and type of benefit	Nondisabled				Disabled widow(er)s		Widowed mothers and fathers	
	Widows		Widowers		Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)				
All widow(er)s	465,627	750.60	27,306	458.40	29,604	563.10	40,829	650.20
	By age							
Under 25	...	...	...	...	...	...	1,451	510.80
25–29	...	...	...	...	...	...	2,895	559.30
30–34	...	...	...	...	...	...	5,295	579.20
35–39	...	...	...	...	...	...	8,006	617.00
40–44	...	...	...	...	...	...	9,370	675.20
45–49	...	...	...	...	...	...	7,328	716.20
50–54	...	...	...	...	11,029	564.90	3,744	733.10
55–59	...	...	...	...	15,917	567.50	1,750	711.70
60–64	155,927	839.70	12,165	635.90	2,490	534.80	723	671.70
60	70,663	849.30	4,783	632.40	1,471	550.10	212	707.80
61	22,966	860.80	3,437	621.10	409	536.80	160	686.80
62	22,235	824.30	1,898	658.30	304	516.90	135	611.90
63	15,633	782.40	700	611.60	158	486.60	104	686.60
64	24,430	842.70	1,347	666.90	148	466.30	112	640.00
65–69	89,688	675.90	3,781	382.30	^b 168	455.10	^b 267	492.40
65	41,095	709.20	1,518	483.90	...	...	...	...
66	12,106	647.20	580	348.00	...	...	...	...
67	12,065	643.40	577	316.30	...	...	...	...
68	11,941	644.10	554	300.40	...	...	...	...
69	12,481	655.80	552	289.80	...	...	...	...
70–74	67,815	668.90	2,913	292.70	...	...	...	...
70	13,083	655.00	580	318.70	...	...	...	...
71	13,135	665.50	552	292.60	...	...	...	...
72	13,636	673.50	600	281.00	...	...	...	...
73	13,818	677.20	615	279.50	...	...	...	...
74	14,143	672.10	566	292.90	...	...	...	...
75–79	69,752	691.30	3,177	285.80	...	...	...	...
75	14,429	674.20	571	295.50	...	...	...	...
76	14,150	687.40	617	280.90	...	...	...	...
77	14,338	683.90	653	277.90	...	...	...	...
78	13,761	701.10	651	281.90	...	...	...	...
79	13,074	712.00	685	293.50	...	...	...	...
80 or older	82,445	780.90	5,270	299.00	...	...	...	...
	By sex							
Men	...	...	...	...	1,393	409.80	4,295	531.40
Women	...	...	...	...	28,211	570.70	36,534	664.20
Widow or mother	411,605	753.10	...	...	24,057	569.90	32,223	665.60
Surviving divorced wife or mother	54,022	731.30	...	...	4,154	575.30	4,311	653.50

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

b. Aged 65 or older.

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

NOTE: ... = not applicable.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2002

Year	Total	Entitled because of age		Entitled because of disability	
		Widows	Widowers	Widows	Widowers
1950	66,735	66,672	63	...	...
1951	89,591	89,324	267	...	...
1952	92,302	91,992	310	...	...
1953	112,866	112,467	399	...	...
1954	128,026	127,626	400	...	...
1955	140,624	140,273	351	...	...
1956	253,524	253,191	333	...	...
1957	244,633	244,172	461	...	...
1958 ^a	199,320	198,948	372	...	...
1959 ^b	252,683	252,100	583	...	...
1960	239,267	238,813	454	...	...
1961	251,275	250,606	669	...	...
1962	267,051	266,465	586	...	...
1963	278,709	278,138	571	...	...
1964	283,263	282,689	574	...	...
1965	359,431	358,875	556	...	...
1966	403,595	403,035	560	...	...
1967	355,589	355,032	557	...	...
1968	375,391	352,280	604	22,438	69
1969	375,753	353,928	625	21,127	73
1970	363,216	347,031	576	15,546	63
1971	381,262	363,689	551	16,960	62
1972	402,809	382,452	544	19,739	74
1973	372,167	351,793	651	19,660	63
1974	363,693	343,317	550	19,793	33
1975	377,246	353,249	476	23,476	45
1976	385,373	362,229	489	22,603	52
1977	416,735	383,057	10,416	22,981	281
1978	403,679	375,750	9,022	18,553	354
1979	445,555	418,883	9,272	17,136	264
1980	452,156	424,690	11,412	15,789	265
1981	480,772	453,307	13,311	13,868	286
1982	492,451	465,070	14,941	12,222	218
1983	501,688	470,764	16,512	14,144	268
1984	499,677	464,979	17,533	16,847	318
1985	501,673	467,197	17,390	16,759	327
1986	491,052	454,903	17,731	18,033	385
1987	475,035	440,803	17,836	16,062	334
1988	457,574	424,107	18,139	14,979	349
1989	449,139	416,154	17,817	14,830	338
1990	451,862	417,925	18,513	15,058	366
1991	468,788	420,190	19,008	28,951	639
1992	472,078	419,413	19,430	32,477	758
1993	466,198	414,941	19,422	31,036	799
1994	459,340	410,323	19,114	29,075	828
1995	444,899	396,725	18,577	28,762	835
1996	438,081	390,962	18,508	27,783	828
1997	440,076	393,014	18,516	27,691	855
1998	443,669	395,231	19,039	28,494	905
1999	469,806	419,205	20,951	28,654	996
2000	505,021	453,334	23,645	26,997	1,045
2001	495,848	443,267	24,309	27,179	1,093
2002	522,537	465,627	27,306	28,211	1,393

a. January–November.
b. Includes December 1958.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2001

Year	Number of—		Average lump sum per worker (dollars)
	Deceased workers	Lump-sum payments	
1940	61,080	75,095	145.79
1941	90,941	117,303	144.58
1942	103,322	134,991	144.77
1943	122,185	163,011	145.66
1944	151,869	205,117	145.68
1945	178,813	247,012	146.05
1946	179,588	250,706	151.74
1947	181,992	218,787	162.16
1948	200,090	213,096	161.50
1949	202,154	212,614	164.02
1950	200,411	209,960	147.81
1951	414,470	431,229	138.24
1952	437,896	456,531	178.20
1953	511,986	532,846	174.16
1954	516,158	536,341	207.86
1955	566,830	589,612	202.72
1956	546,984	572,291	200.80
1957	689,282	718,672	201.63
1958 ^a	656,825	683,964	202.52
1959 ^b	822,413	855,032	212.67
1960	778,660	809,194	211.55
1961	813,464	843,308	210.46
1962	865,217	892,261	212.02
1963	968,651	1,015,536	212.61
1964	1,011,414	1,073,044	213.94
1965	989,848	1,046,874	226.01
1966	1,060,335	1,138,317	224.00
1967	1,133,787	1,217,980	222.51
1968	1,158,666	1,216,910	236.30
1969	1,253,467	1,295,897	232.60
1970	1,220,248	1,257,687	243.90
1971	1,251,831	1,283,924	244.20
1972	1,290,133	1,320,637	247.90
1973	1,299,223	1,325,833	253.10
1974	1,285,221	1,307,890	254.64
1975	1,334,914	1,344,095	252.47
1976	1,321,516	1,328,008	251.60
1977	1,227,390	1,240,304	254.17
1978	1,437,275	1,451,140	254.65
1979	1,500,944	1,515,614	254.68
1980	1,552,617	1,566,330	254.70
1981	1,305,261	1,321,565	254.72
1982	797,096	808,041	255.00
1983	805,524	807,537	255.00
1984	825,494	831,761	255.00
1985	823,053	825,395	255.00
1986	809,487	811,946	255.00
1987	810,066	812,814	255.00
1988	839,802	842,037	255.00
1989	829,682	831,825	255.00
1990	830,799	832,900	255.00
1991	847,838	850,100	255.00
1992	855,073	857,614	255.00
1993	860,861	863,492	255.00
1994	852,289	855,278	255.00
1995	^c 835,360	^c 838,015	255.00
1996	832,304	835,277	255.00
1997	825,176	828,072	255.00
1998	833,770	836,468	255.00
1999	873,890	876,878	255.00
2000	933,767	937,159	255.00
2001	926,625	930,712	255.00

a. January–November.
b. Includes December 1958.
c. Revised data.

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

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.E OASDI: Benefits Withheld

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2002

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	102,180	100.0	30,040	100.0	72,140	100.0
Less than 350.00	18,620	18.2	7,540	25.1	11,080	15.4
350.00–399.90	3,660	3.6	1,440	4.8	2,220	3.1
400.00–449.90	4,350	4.3	1,300	4.3	3,050	4.2
450.00–499.90	5,110	5.0	1,670	5.6	3,440	4.8
500.00–549.90	5,650	5.5	1,780	5.9	3,870	5.4
550.00–599.90	5,450	5.3	1,610	5.4	3,840	5.3
600.00–649.90	4,870	4.8	1,350	4.5	3,520	4.9
650.00–699.90	4,530	4.4	1,240	4.1	3,290	4.6
700.00–749.90	4,290	4.2	1,240	4.1	3,050	4.2
750.00–799.90	4,410	4.3	1,040	3.5	3,370	4.7
800.00–849.90	3,770	3.7	960	3.2	2,810	3.9
850.00–899.90	3,680	3.6	940	3.1	2,740	3.8
900.00–949.90	3,100	3.0	720	2.4	2,380	3.3
950.00–999.90	3,220	3.2	830	2.8	2,390	3.3
1,000.00–1,049.90	3,120	3.1	740	2.5	2,380	3.3
1,050.00–1,099.90	2,570	2.5	640	2.1	1,930	2.7
1,100.00–1,149.90	2,610	2.6	560	1.9	2,050	2.8
1,150.00–1,199.90	3,210	3.1	400	1.3	2,810	3.9
1,200.00–1,249.90	3,200	3.1	410	1.4	2,790	3.9
1,250.00–1,299.90	2,900	2.8	390	1.3	2,510	3.5
1,300.00 or more	9,860	9.6	3,240	10.8	6,620	9.2
Men	64,340	100.0	20,900	100.0	43,440	100.0
Less than 350.00	9,920	15.4	4,330	20.7	5,590	12.9
350.00–399.90	2,610	4.1	1,160	5.6	1,450	3.3
400.00–449.90	2,840	4.4	990	4.7	1,850	4.3
450.00–499.90	3,160	4.9	1,310	6.3	1,850	4.3
500.00–549.90	2,970	4.6	1,360	6.5	1,610	3.7
550.00–599.90	2,560	4.0	1,180	5.6	1,380	3.2
600.00–649.90	2,380	3.7	900	4.3	1,480	3.4
650.00–699.90	2,340	3.6	910	4.4	1,430	3.3
700.00–749.90	2,360	3.7	860	4.1	1,500	3.5
750.00–799.90	2,370	3.7	750	3.6	1,620	3.7
800.00–849.90	2,160	3.4	610	2.9	1,550	3.6
850.00–899.90	2,330	3.6	610	2.9	1,720	4.0
900.00–949.90	2,060	3.2	480	2.3	1,580	3.6
950.00–999.90	2,060	3.2	560	2.7	1,500	3.5
1,000.00–1,049.90	2,180	3.4	450	2.2	1,730	4.0
1,050.00–1,099.90	1,860	2.9	400	1.9	1,460	3.4
1,100.00–1,149.90	2,000	3.1	450	2.2	1,550	3.6
1,150.00–1,199.90	2,520	3.9	290	1.4	2,230	5.1
1,200.00–1,249.90	2,690	4.2	310	1.5	2,380	5.5
1,250.00–1,299.90	2,430	3.8	320	1.5	2,110	4.9
1,300.00 or more	8,540	13.3	2,670	12.8	5,870	13.5
Women	37,840	100.0	9,140	100.0	28,700	100.0
Less than 350.00	8,700	23.0	3,210	35.1	5,490	19.1
350.00–399.90	1,050	2.8	280	3.1	770	2.7
400.00–449.90	1,510	4.0	310	3.4	1,200	4.2
450.00–499.90	1,950	5.2	360	3.9	1,590	5.5
500.00–549.90	2,680	7.1	420	4.6	2,260	7.9
550.00–599.90	2,890	7.6	430	4.7	2,460	8.6
600.00–649.90	2,490	6.6	450	4.9	2,040	7.1
650.00–699.90	2,190	5.8	330	3.6	1,860	6.5
700.00–749.90	1,930	5.1	380	4.2	1,550	5.4
750.00–799.90	2,040	5.4	290	3.2	1,750	6.1
800.00–849.90	1,610	4.3	350	3.8	1,260	4.4
850.00–899.90	1,350	3.6	330	3.6	1,020	3.6
900.00–949.90	1,040	2.7	240	2.6	800	2.8
950.00–999.90	1,160	3.1	270	3.0	890	3.1
1,000.00–1,049.90	940	2.5	290	3.2	650	2.3
1,050.00–1,099.90	710	1.9	240	2.6	470	1.6
1,100.00–1,149.90	610	1.6	110	1.2	500	1.7
1,150.00–1,199.90	690	1.8	110	1.2	580	2.0
1,200.00–1,249.90	510	1.3	100	1.1	410	1.4
1,250.00–1,299.90	470	1.2	70	0.8	400	1.4
1,300.00 or more	1,320	3.5	570	6.2	750	2.6

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

CONTACT: Dana N. Mercer (410) 966-6637 or Robert L. Hackendorf (410) 965-5536.

Table 6.E4—Number of beneficiaries with benefits withheld, by reason for withholding payment and type of benefit, December 2002

Reason payment withheld	Total, all beneficiaries	Retired workers			Disabled workers	Wives and husbands				Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
		Subtotal	Men	Women		Subtotal	Wives		Husbands					
							Without children ^a	With children ^b						
Total	1,666,584	102,069	63,734	38,335	105,023	286,800	157,002	59,947	69,851	463,718	62,905	636,184	547	9,338
Earnings of—														
Retired workers	38,759	36,313	21,018	15,295	...	1,503	1,283	147	73	943	...	...	...	...
Other beneficiaries	89,005	...	...	...	...	39,364	660	36,458	2,246	195	40,413	9,033	...	...
Entitled child not in care of beneficiary	28,363	...	...	...	...	13,479	83	12,274	1,122	...	14,884	...	...	...
Payee not determined	7,740	715	362	353	1,405	40	28	6	6	5,325	12	242	...	...
Recoupment of overpayment for reasons other than earnings	27,835	6,673	3,378	3,295	5,686	2,007	1,164	807	36	9,890	1,210	2,364	...	...
Address unknown	49,875	19,834	11,659	8,175	8,738	1,619	1,031	425	163	12,111	219	6,924	39	391
Determination of continuing disability pending	8,300	...	...	...	5,273	226	4	214	8	2,783	...	18	...	...
Workers' compensation offset	7,863	...	...	...	1,973	555	34	497	24	5,335	...	...	...	...
Government pension offset	280,719	...	...	...	...	185,450	122,581	37	62,832	...	73	91,762	...	3,434
Receipt of public assistance	3,756	...	...	...	...	...	...	...	...	...	...	...	...	3,756
Technical entitlement	905,624	...	...	...	...	25,424	17,831	5,775	1,818	366,964	1,469	511,616	107	44
Other reasons	218,745	38,534	27,317	11,217	81,948	17,133	12,303	3,307	1,523	60,172	4,625	14,225	396	1,712

a. Aged 62 or older.

b. Under age 65 with entitled children in their care.

c. Not shown to avoid disclosure of information regarding particular individuals.

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 6.E5—Number of wives, husbands, and children with benefits withheld, by reason for withholding payment and type of benefit, December 2002

Reason payment withheld	Wives and husbands of—		Children under age 18 of—			Disabled adult children of—			Students aged 18–19 of—		
	Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total	229,243	57,557	20,855	46,918	207,437	86,299	60,271	18,584	4,637	12,278	6,439
Earnings of—											
Retired workers	1,503	...	793	...	...	112	...	...	38	...	...
Other beneficiaries	7,017	32,347	27	37	75	15	15	...	...	12	...
Entitled child not in care of beneficiary	2,198	11,281	...	...	...	...	...	...	...	...	...
Payee not determined	32	8	211	2,443	1,701	147	722	84	...	12	...
Recoupment of overpayment for reasons other than earnings	1,227	780	414	2,490	6,328	84	267	115	12	79	101
Address unknown	1,208	411	584	2,950	6,117	318	1,490	281	30	199	142
Determination of continuing disability pending	...	226	...	...	2,240	73	300	159	...	...	11
Workers' compensation offset	...	555	...	...	5,160	...	...	74	...	...	101
Government pension offset	183,737	1,713	...	...	...	...	...	...	...	...	...
Technical entitlement	18,103	7,321	15,331	28,264	155,647	82,997	48,841	14,107	4,473	11,629	5,675
Other reasons	14,218	2,915	3,495	10,734	30,169	2,553	8,636	3,764	80	347	394

a. Not shown to avoid disclosure of information regarding particular individuals.

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

6.F OASDI: Benefits Terminated

Table 6.F1—Number of benefits terminated, by type, 1940–2002

Year	Total, all benefits	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
					Total	Under age 18	Disabled adult children	Students				
Total	134,107,533	46,967,015	14,309,886	17,031,268	37,765,295	23,778,593	718,508	13,268,194	4,476,197	12,217,963	107,252	1,232,657
1940–1944	246,534	84,737	...	40,811	73,394	73,394	...	...	40,868	5,680	1,044	...
1945–1949	896,041	304,902	...	154,261	250,835	250,835	...	...	145,998	36,144	3,901	...
1950	266,615	98,280	...	51,200	69,062	69,062	...	...	33,313	13,642	1,118	...
1951	354,282	141,665	...	73,706	82,516	82,516	...	...	37,016	17,999	1,380	...
1952	383,780	160,284	...	85,349	75,352	75,352	...	...	40,085	20,978	1,732	...
1953	455,652	193,688	...	99,409	89,292	89,292	...	...	44,331	27,006	1,926	...
1954	501,694	212,894	...	111,788	99,375	99,375	...	...	45,870	29,871	1,896	...
1955	579,229	247,998	...	125,880	117,443	117,443	...	...	49,330	36,488	2,090	...
1956	624,981	269,006	...	134,700	128,391	128,391	...	...	51,874	38,849	2,161	...
1957	789,331	334,710	16,131	178,464	146,828	146,540	288	...	54,715	56,022	2,461	...
1958	817,512	322,279	52,949	173,608	156,944	156,348	596	...	52,088	57,422	2,222	...
1959	1,163,018	458,175	81,982	255,169	211,711	209,948	1,763	...	67,346	85,401	3,234	...
1960	1,170,612	440,555	89,090	249,792	235,965	233,512	2,453	...	67,555	84,396	3,259	...
1961	1,327,950	471,552	115,546	276,437	290,895	287,599	3,296	...	77,778	92,322	3,420	...
1962	1,410,718	507,807	128,299	282,569	311,045	307,200	3,845	...	78,261	99,332	3,405	...
1963	1,672,045	591,951	137,850	330,576	397,764	392,606	5,158	...	92,246	117,743	3,915	...
1964	1,739,693	616,124	138,576	333,969	424,680	418,834	5,846	...	96,116	126,328	3,900	...
1965	1,868,804	646,734	156,648	345,229	481,215	448,344	6,628	26,243	98,058	137,031	3,889	...
1966	2,178,105	696,038	168,630	351,877	704,131	457,688	7,329	239,114	92,054	158,302	3,749	3,324
1967	2,545,076	748,184	208,899	373,803	820,610	503,110	9,178	308,322	102,004	172,411	3,789	115,376
1968	2,654,191	789,586	222,197	386,245	837,390	514,363	10,620	312,407	100,344	188,844	4,004	125,581
1969	2,860,287	827,151	251,269	399,689	946,481	564,725	11,922	369,834	107,119	205,188	3,525	119,865
1970	2,841,523	817,129	260,444	388,574	956,566	582,918	11,795	361,853	102,578	208,843	3,313	104,076
1971	2,944,134	846,103	266,471	394,422	1,011,381	607,138	11,621	392,622	104,577	223,988	3,162	94,030
1972	2,949,327	839,018	261,739	384,297	1,037,251	605,569	13,924	417,758	108,995	232,375	2,950	82,702
1973	3,132,957	873,593	304,792	396,828	1,137,641	637,851	12,445	487,345	103,056	234,039	2,955	80,053
1974	3,296,247	921,897	320,958	416,891	1,205,329	699,400	15,288	490,641	116,061	243,139	2,886	69,086
1975	3,313,151	931,953	329,532	421,973	1,209,574	695,082	15,195	499,297	110,493	249,274	2,574	57,778
1976	3,405,273	941,162	351,504	424,417	1,262,306	711,425	16,104	534,777	114,823	256,020	2,412	52,629
1977	3,551,125	955,114	401,334	430,431	1,331,923	740,822	17,060	574,041	114,605	265,721	2,285	49,712
1978	3,589,849	977,703	413,571	428,498	1,342,365	736,536	17,496	588,333	112,491	271,102	2,106	42,013
1979	3,568,400	953,520	422,503	426,014	1,346,176	726,910	18,598	600,668	111,604	272,422	1,831	34,330
1980	3,538,615	1,009,542	408,051	420,313	1,259,831	636,825	14,561	608,445	118,300	289,326	1,705	31,547
1981	3,596,613	1,006,756	434,187	419,331	1,305,554	664,436	15,482	625,636	111,025	291,081	1,649	27,030
1982	3,869,989	1,032,327	483,847	437,104	1,485,066	677,326	16,435	791,305	109,210	298,435	1,521	22,479
1983	3,788,835	1,068,963	453,621	492,524	1,223,789	584,312	19,706	619,771	214,361	309,168	1,448	24,961
1984	3,230,134	1,102,737	371,913	373,796	954,150	498,199	19,277	436,674	88,342	319,858	1,283	18,055
1985	3,109,569	1,150,236	339,984	367,257	820,641	446,106	17,022	357,513	84,165	331,090	1,228	14,968
1986	2,996,494	1,152,844	341,276	362,966	703,293	474,999	17,013	211,281	90,071	329,855	1,110	15,079
1987	2,967,965	1,163,655	347,948	354,240	681,275	457,523	17,056	206,696	80,131	328,008	1,041	11,667
1988	3,087,126	1,227,357	356,143	354,250	723,385	484,001	19,478	219,906	73,473	341,432	922	10,164
1989	2,977,413	1,202,430	351,402	339,550	678,094	454,048	19,726	204,320	66,527	332,040	856	6,514
1990	2,958,646	1,222,810	348,194	337,006	646,343	415,616	20,014	210,713	64,260	334,293	769	4,971
1991	2,943,272	1,237,517	351,303	332,892	619,977	401,092	17,723	201,162	61,383	335,740	646	3,814
1992	2,969,109	1,252,171	361,796	329,102	616,771	397,723	17,857	201,191	65,852	339,827	617	2,973
1993	3,075,227	1,313,867	372,317	336,335	632,585	408,497	18,842	205,246	62,436	354,833	578	2,276
1994	3,124,009	1,329,241	384,590	331,416	647,848	421,730	20,034	206,084	72,662	356,097	529	1,626
1995	3,161,744	1,334,027	399,475	327,233	678,821	451,375	22,639	204,807	61,813	358,691	493	1,191
1996	3,187,291	1,352,339	396,980	321,703	690,618	459,254	23,776	207,588	61,618	362,751	444	838
1997	3,413,296	1,370,596	464,984	319,172	777,803	537,259	26,210	214,334	60,342	419,105	376	918
1998	3,307,618	1,405,342	409,489	313,423	741,412	495,678	26,755	218,979	54,551	382,619	346	436
1999	3,366,363	1,436,865	433,950	312,867	748,950	490,634	29,444	228,872	51,341	381,791	361	238
2000	3,404,466	1,447,269	460,351	310,703	753,430	502,351	33,300	217,779	50,925	381,341	282	165
2001	3,440,679	1,460,763	459,073	304,413	775,873	515,300	32,988	227,585	49,838	390,315	289	115
2002	3,494,924	1,465,869	478,098	306,796	807,955	534,181	34,722	239,052	49,919	385,945	265	77

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 6.F2—Number, by reason for termination and type of benefit, 2002

Reason for termination	All benefits	Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s and parents	Special age-72 beneficiaries
Total	3,494,924	1,465,869	478,098	306,796	807,955	49,919	386,210	77
Death of beneficiary	2,024,230	1,411,917	180,602	81,557	20,143	992	328,942	77
Death of worker	177,407	...	...	148,108	29,299	...	...	...
Marriage, remarriage, or divorce of beneficiary	27,160	...	...	4,488	9,881	8,759	4,032	...
Attainment of age—								
16 by child	60,251	...	...	26,151	...	34,100	...	...
18 by child	410,102	...	...	...	410,102	...	...	...
19 by student	38,687	...	...	...	38,687	...	...	...
65 by disabled worker	256,033	...	225,674	18,326	12,033	...	...	...
65 by disabled widow(er)	12,788	...	...	...	...	...	12,788	...
Entitlement to an equal or larger Social Security benefit	91,973	39,100	4,257	7,560	4,330	3,487	33,239	...
Does not meet medical standards ^a								
Disabled worker or widow(er)	107,466	...	61,522	2,806	42,854	...	264	...
Disabled adult child	3,895	...	...	...	3,895	...	...	...
Student no longer attending school	195,091	...	...	...	195,091	...	...	...
Other	89,861	14,852	6,043	17,800	41,640	2,581	6,945	...

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 6.F3—Number of wives, husbands, and children, by reason for termination and type of benefit, 2002

Reason for termination	Wives and husbands of—		Children under age 18 of—			Disabled adult children of—			Students aged 18–19 of—		
	Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total	253,206	53,590	51,592	199,818	282,771	6,463	18,077	10,182	29,997	118,613	90,442
Death of beneficiary	80,185	1,372	185	1,757	952	3,106	13,385	557	21	114	66
Death of worker	141,348	6,760	...	...	26,530	...	...	1,617	...	...	1,152
Marriage, remarriage, or divorce of beneficiary	1,954	2,534	638	1,850	4,715	264	1,481	364	69	230	270
Attainment of age—											
16 by child	9,118	17,033	...	...	...	...	...	...	...	...	...
18 by child	...	...	47,041	190,357	172,704	...	...	...	...	...	...
19 by student	...	...	...	...	...	...	...	...	4,551	20,861	13,275
65 by disabled worker	...	18,326	...	...	7,044	...	...	4,574	...	...	415
Entitlement to an equal or larger Social Security benefit	6,057	1,503	1,965	290	846	532	274	306	71	11	35
Does not meet medical standards ^a											
Disabled worker	...	2,806	...	...	40,906	...	...	1,560	...	...	388
Disabled adult child	...	...	...	...	...	912	2,712	271	...	...	...
Student no longer attending school	...	...	...	...	...	...	...	...	24,977	96,714	73,400
Other	14,544	3,256	1,763	5,564	29,074	1,649	225	933	308	683	1,441

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 7.A1—Number of recipients of federally administered payments, total payments, and average monthly payment, by source of payment, eligibility category, and age, December 2002

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number of recipients							
Total	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284
Federal payment only	4,326,205	640,133	43,062	3,643,010	668,217	2,570,005	1,087,983
Federal payment and state supplementation	2,179,022	511,519	29,127	1,638,376	243,974	1,169,651	765,397
State supplementation only	282,630	99,876	5,469	177,285	2,630	138,096	141,904
Total with—							
Federal payment	6,505,227	1,151,652	72,189	5,281,386	912,191	3,739,656	1,853,380
State supplementation	2,461,652	611,395	34,596	1,815,661	246,604	1,307,747	907,301
Total payments^b (thousands of dollars)							
Total	2,951,425	415,574	35,144	2,500,707	475,974	1,808,645	666,806
Federal payments	2,623,339	325,286	28,264	2,269,789	459,966	1,629,676	533,697
State supplementation	328,086	90,288	6,880	230,918	16,008	178,969	133,109
Average monthly payment^c (dollars)							
Total	407.42	330.04	444.54	424.75	487.73	427.73	332.03
Federal payments	376.76	280.86	384.79	397.71	472.67	398.82	286.20
State supplementation	127.53	146.17	194.32	119.94	60.72	127.71	145.22

a. Includes approximately 17,900 blind and 725,900 disabled persons aged 65 or older.

b. Includes retroactive payments.

c. Excludes retroactive payments.

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

CONTACT: Art Kahn (410) 965-0186.

Table 7.A2—Number of individuals and couples receiving federally administered payments, total payments, and average monthly payment, by source of payment and eligibility category, December 2002

Source of payment	Aged		Blind		Disabled		Blind and disabled under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
Number of recipients							
Total	993,038	133,438	66,123	2,949	4,255,127	142,987	914,821
Federal payment only	538,199	52,062	37,052	1,271	2,811,001	82,481	668,217
Federal payment and state supplementation	380,534	68,694	24,163	1,411	1,284,671	53,038	243,974
State supplementation only	74,305	12,682	4,908	267	159,455	7,468	2,630
Total with—							
Federal payment	918,733	120,756	61,215	2,682	4,095,672	135,519	912,191
State supplementation	454,839	81,376	29,071	1,678	1,444,126	60,506	246,604
Total payments^a (thousands of dollars)							
Total	321,856	98,350	29,519	2,499	1,923,954	99,273	475,974
Federal payments	260,024	68,697	23,906	1,623	1,730,375	78,749	459,966
State supplementation	61,832	29,653	5,613	876	193,579	20,525	16,008
Average monthly payment (dollars)							
Total	322.26	730.49	438.66	825.60	417.63	662.65	487.73
Federal payments	281.54	564.62	383.73	589.77	389.32	554.78	472.67
State supplementation	134.45	360.41	189.06	510.68	126.23	324.74	60.72

a. Includes retroactive payments.

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

CONTACT: Art Kahn (410) 965-0186.

7.A SSI: Summary

Table 7.A3—Number of recipients, by eligibility category and source of payment, January 1974 and December 1975–2002, selected years

Month and year	Total	Federally administered	Federal SSI	State supplementation				
				Total	Federally administered		State administered	
					Total, federally administered supplementation	Federally administered only	Total, state administered supplementation	State administered only
All recipients								
January 1974	3,248,949	3,215,632	2,955,959	1,838,602	1,480,309	259,673	358,293	33,317
December								
1975	4,359,625	4,314,275	3,893,419	1,987,409	1,684,018	420,856	303,391	45,350
1980	4,194,100	4,142,017	3,682,411	1,934,239	1,684,765	459,606	249,474	52,083
1985	4,200,177	4,138,021	3,799,092	1,915,503	1,660,847	338,929	254,656	62,156
1990	4,888,180	4,817,127	4,412,131	2,343,803	2,058,273	404,996	285,530	71,053
1995	6,575,753	6,514,134	6,194,493	2,817,408	2,517,805	319,641	299,603	61,619
2000	6,685,169	6,601,686	6,319,907	3,163,504	2,480,637	281,779	682,867	83,483
2001	6,775,548	6,688,489	6,410,138	3,209,168	2,520,005	278,351	689,163	87,059
2002	6,939,844	6,787,857	6,505,227	3,014,219	2,461,652	282,630	552,567	151,989
Aged								
January 1974	1,889,898	1,865,109	1,690,496	1,022,244	770,318	174,613	251,926	24,789
December								
1975	2,333,685	2,307,105	2,024,765	1,028,596	843,917	282,340	184,679	26,580
1980	1,838,381	1,807,776	1,533,366	837,318	702,763	274,410	134,555	30,605
1985	1,529,674	1,504,469	1,322,292	698,634	583,913	182,177	114,721	25,205
1990	1,484,160	1,454,041	1,256,623	765,420	649,530	197,418	115,890	30,119
1995	1,479,415	1,446,122	1,314,720	777,841	663,390	131,402	114,451	33,293
2000	1,327,567	1,289,339	1,186,309	767,312	622,668	103,030	144,644	38,228
2001	1,304,273	1,264,463	1,164,825	764,606	620,952	99,638	143,654	39,810
2002	1,291,394	1,251,528	1,151,652	750,246	611,395	99,876	138,851	39,866
Blind								
January 1974	73,850	72,390	55,680	45,828	37,326	16,710	8,502	1,460
December								
1975	75,315	74,489	68,375	36,309	31,376	6,114	4,933	826
1980	79,139	78,401	68,945	39,863	36,214	9,456	3,649	738
1985	82,622	82,220	73,817	41,323	38,291	8,403	3,032	402
1990	84,109	83,686	74,781	43,376	40,334	8,905	3,042	423
1995	84,273	83,545	77,064	42,272	38,695	6,481	3,577	728
2000	79,295	78,511	72,931	40,585	35,940	5,580	4,645	784
2001	79,058	78,255	72,811	40,272	35,708	5,444	4,564	803
2002	78,476	77,658	72,189	39,123	34,596	5,469	4,527	818
Disabled								
January 1974	1,285,201	1,278,122	1,209,783	769,501	672,575	68,350	96,926	7,068
December								
1975	1,950,625	1,932,681	1,800,279	922,229	808,725	132,402	113,504	17,944
1980	2,276,130	2,255,840	2,080,100	1,050,155	945,788	175,740	104,367	20,290
1985	2,586,741	2,551,332	2,402,983	1,167,326	1,038,643	148,349	128,683	35,409
1990	3,319,911	3,279,400	3,080,727	1,535,007	1,368,409	198,673	166,598	40,511
1995	5,010,326	4,984,467	4,802,709	1,995,262	1,815,720	181,758	179,542	25,859
2000	5,270,126	5,233,836	5,060,667	2,147,945	1,822,029	173,169	325,916	36,290
2001	5,384,121	5,345,771	5,172,502	2,196,639	1,863,345	173,269	333,294	38,350
2002	5,496,622	5,458,671	5,281,386	2,147,705	1,815,661	177,285	332,044	37,951

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

CONTACT: Art Kahn (410) 965-0186.

Table 7.A4—Total payments, by eligibility category and source of payment, selected years 1974–2002
(in thousands of dollars)

Year	Total	Federally administered	Federal SSI	State supplementation		
				Total	Federally administered	State administered ^a
All recipients						
1974	5,245,719	5,096,813	3,833,161	1,412,558	1,263,652	148,906
1975	5,878,224	5,716,072	4,313,538	1,564,686	1,402,534	162,152
1980	7,940,734	7,714,640	5,866,354	2,074,380	1,848,286	226,094
1985	11,060,476	10,749,938	8,777,341	2,283,135	1,972,597	310,538
1990	16,598,680	16,132,959	12,893,805	3,704,875	3,239,154	465,721
1995	27,627,658	27,037,280	23,919,430	3,708,228	3,117,850	590,378
2000	31,564,439	30,671,699	27,290,248	4,274,191	3,381,451	892,740
2001	33,060,819	32,165,856	28,705,503	4,355,316	3,460,353	894,963
2002	34,566,844	33,718,999	29,898,765	4,668,079	3,820,234	847,845
Aged						
1974	2,503,407	2,414,034	1,782,742	720,665	631,292	89,373
1975	2,604,792	2,516,515	1,842,980	761,812	673,535	88,277
1980	2,734,270	2,617,023	1,860,194	874,076	756,829	117,247
1985	3,034,596	2,896,671	2,202,557	832,039	694,114	137,925
1990	3,736,104	3,559,388	2,521,382	1,214,722	1,038,006	176,716
1995	4,467,146	4,239,222	3,374,772	1,092,374	864,450	227,924
2000	4,811,048	4,537,914	3,595,384	1,225,603	942,530	283,073
2001	4,958,644	4,664,076	3,708,527	1,250,117	955,549	294,568
2002	5,085,554	4,802,792	3,751,491	1,334,063	1,051,301	282,762
Blind						
1974	130,195	125,791	91,308	38,887	34,483	4,404
1975	130,936	127,240	92,427	38,509	34,813	3,696
1980	190,075	185,827	131,506	58,569	54,321	4,248
1985	264,162	259,840	195,183	68,979	64,657	4,322
1990	334,120	328,949	238,415	95,705	90,534	5,171
1995	375,512	367,441	298,238	77,274	69,203	8,071
2000	394,484	385,832	312,144	82,324	73,688	8,636
2001	407,371	398,624	323,895	83,476	74,729	8,747
2002	426,409	416,454	335,405	91,004	81,049	9,955
Disabled						
1974	2,601,936	2,556,988	1,959,112	642,824	597,876	44,948
1975	3,142,476	3,072,317	2,378,131	764,345	694,186	70,159
1980	5,013,948	4,911,792	3,874,655	1,139,293	1,037,137	102,156
1985	7,754,588	7,593,427	6,379,601	1,374,987	1,213,826	161,161
1990	12,520,568	12,244,622	10,134,007	2,386,561	2,110,615	275,946
1995	22,778,547	22,430,612	20,246,415	2,532,132	2,184,197	347,935
2000	26,189,350	25,764,675	23,399,442	2,844,868	2,365,233	479,635
2001	27,611,303	27,125,707	24,695,630	2,915,673	2,430,077	485,596
2002	28,996,405	28,531,939	25,844,055	3,184,518	2,687,884	496,634

a. Includes data not distributed by category.

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

CONTACT: Stella M. Coleman (410) 965-0157 and Alfreda Brooks (410) 965-9849.

7.A SSI: Summary

Table 7.A5—Average monthly payment, by eligibility category and source of payment, December 1975–2002, selected years (in dollars)

Year	Total	Federally administered	Federal SSI	State supplementation			
				Total	Federally administered	State administered ^a	
All recipients							
1975	108.46	106.33	90.59	57.55	61.72	38.69	
1980	164.66	161.92	138.14	93.44	95.17	81.57	
1985	220.70	218.09	193.77	99.37	99.39	99.21	
1990	279.91	276.45	241.52	128.24	127.83	131.32	
1995	338.73	335.45	312.83	103.23	98.66	142.59	
2000	385.52	378.82	351.48	112.16	112.50	110.95	
2001	400.06	393.96	366.31	112.65	113.65	109.03	
2002	408.64	407.42	376.76	127.45	127.53	110.62	
Aged							
1975	88.91	86.72	73.77	50.61	57.38	28.68	
1980	130.28	126.66	105.69	92.64	95.60	77.55	
1985	168.16	164.01	141.41	101.25	103.58	89.91	
1990	213.40	208.26	170.74	133.62	136.31	118.82	
1995	256.66	250.27	220.15	116.26	109.62	153.94	
2000	309.40	299.69	258.12	135.88	128.46	167.49	
2001	322.69	314.22	271.13	137.06	130.89	163.52	
2002	338.01	330.04	280.86	150.29	146.17	168.24	
Blind							
1975	140.20	137.58	112.69	68.81	78.57	35.40	
1980	195.60	192.51	163.36	109.79	111.41	97.56	
1985	263.86	260.25	224.31	121.76	122.15	118.07	
1990	323.31	319.03	267.34	165.57	167.29	148.26	
1995	360.61	355.24	317.06	143.65	138.31	188.15	
2000	418.14	413.22	360.51	168.91	171.01	154.79	
2001	432.89	428.04	374.72	172.27	173.98	159.85	
2002	449.41	444.54	384.79	190.78	194.31	163.91	
Disabled							
1975	130.59	128.49	108.55	65.63	65.68	65.20	
1980	190.96	188.70	160.78	93.57	94.38	86.19	
1985	248.36	246.50	219.61	97.73	96.63	107.06	
1990	305.82	302.78	266.84	125.01	123.36	139.70	
1995	360.99	358.18	336.39	97.76	94.26	134.44	
2000	402.93	397.92	373.41	108.66	105.86	124.09	
2001	417.16	412.46	387.80	109.10	106.72	122.29	
2002	429.37	424.75	397.71	120.55	119.94	123.81	

a. Includes data not distributed by category.

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

NOTE: Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186.

Table 7.A8—Number of federally administered awards, by eligibility category and age, 1974–2002

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All awards	23,858,560	7,156,810	287,570	16,414,180	2,821,660	13,728,010	7,308,890
State conversions ^a	3,158,410	1,763,250	77,660	1,317,500	2,620	1,305,060	1,850,730
Federal applications							
1974	1,329,870	767,340	8,230	554,300	66,880	491,170	771,820
1975	927,800	349,800	9,020	568,980	62,880	508,950	355,970
1976	674,580	222,600	6,990	444,990	45,030	403,350	226,200
1977	643,480	213,990	8,180	421,310	50,970	375,950	216,560
1978	566,190	193,610	7,860	364,720	47,050	323,170	195,970
1979	517,010	176,980	7,820	332,210	45,810	292,380	178,820
1980	526,790	185,150	8,790	332,850	46,260	293,740	186,790
1981	411,510	122,680	8,180	280,650	39,050	248,340	124,120
1982	342,680	103,330	6,770	232,580	35,670	202,590	104,420
1983	458,610	152,730	7,730	298,150	42,110	262,660	153,840
1984	586,670	217,100	8,780	360,790	45,740	322,390	218,540
1985	527,800	155,820	8,220	363,760	46,590	324,070	157,140
1986	603,580	159,590	7,770	436,220	51,020	391,600	160,960
1987	589,440	166,210	8,290	414,940	48,480	373,320	167,640
1988	578,370	168,720	7,130	402,520	47,560	361,070	169,740
1989	629,460	188,280	7,010	434,170	51,520	388,120	189,820
1990	718,310	193,680	7,820	516,810	76,070	446,940	195,300
1991	822,890	190,000	7,480	625,410	126,190	504,860	191,840
1992	1,049,260	190,840	8,210	850,210	221,080	636,300	191,880
1993	1,054,170	186,420	6,870	860,880	236,220	630,030	187,920
1994	944,830	158,900	6,470	779,460	203,190	580,640	161,000
1995	893,460	142,830	5,800	744,830	177,550	571,080	144,830
1996	797,970	124,650	5,400	667,920	144,270	526,690	127,010
1997	673,340	94,230	4,920	574,190	116,280	461,260	95,800
1998	739,410	109,570	6,440	623,400	135,600	489,240	114,570
1999	757,270	121,000	5,940	630,330	139,400	493,960	123,910
2000	747,010	116,610	5,930	624,470	144,540	483,020	119,450
2001	770,340	107,950	6,110	656,280	156,900	502,590	110,850
2002	818,050	112,950	5,750	699,350	169,130	533,470	115,450

a. Persons who were converted in 1973 from the state Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled programs to the SSI program.

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

NOTE: Represents period in which first payment was made, not date of entitlement to payments.

CONTACT: Clark Pickett (410) 965-9016.

7.A SSI: Summary

Table 7.A9—Number of recipients of federally administered payments, by eligibility category and age, December 1974–2002

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
1974	3,996,064	2,285,909	74,616	1,635,539	70,900	1,503,155	2,422,009
1975	4,314,275	2,307,105	74,489	1,932,681	107,026	1,699,394	2,507,855
1976	4,235,939	2,147,697	76,366	2,011,876	125,412	1,713,594	2,396,933
1977	4,237,692	2,050,921	77,362	2,109,409	147,355	1,736,879	2,353,458
1978	4,216,925	1,967,900	76,895	2,171,890	165,899	1,747,126	2,303,900
1979	4,149,575	1,871,716	77,250	2,200,609	177,306	1,726,553	2,245,716
1980	4,142,017	1,807,776	78,401	2,255,840	190,394	1,730,847	2,220,776
1981	4,018,875	1,678,090	78,570	2,262,215	194,890	1,702,895	2,121,090
1982	3,857,590	1,548,741	77,356	2,231,493	191,570	1,655,279	2,010,741
1983	3,901,497	1,515,400	78,960	2,307,137	198,323	1,699,774	2,003,400
1984	4,029,333	1,530,287	80,524	2,418,522	211,587	1,780,459	2,037,287
1985	4,138,021	1,504,469	82,220	2,551,332	227,384	1,879,168	2,031,469
1986	4,269,184	1,473,428	83,115	2,712,641	241,198	2,010,458	2,017,528
1987	4,384,999	1,455,387	83,421	2,846,191	250,902	2,118,710	2,015,387
1988	4,463,869	1,433,420	82,864	2,947,585	255,135	2,202,714	2,006,020
1989	4,593,059	1,439,043	82,765	3,071,251	264,890	2,301,926	2,026,243
1990	4,817,127	1,454,041	83,686	3,279,400	308,589	2,449,897	2,058,641
1991	5,118,470	1,464,684	84,549	3,569,237	397,162	2,641,524	2,079,784
1992	5,566,189	1,471,022	85,400	4,009,767	556,470	2,910,016	2,099,703
1993	5,984,330	1,474,852	85,456	4,424,022	722,678	3,148,413	2,113,239
1994	6,295,786	1,465,905	84,911	4,744,970	841,474	3,335,255	2,119,057
1995	6,514,134	1,446,122	83,545	4,984,467	917,048	3,482,256	2,114,830
1996	6,613,718	1,412,632	82,137	5,118,949	955,174	3,568,393	2,090,151
1997	6,494,985	1,362,350	80,778	5,051,857	879,828	3,561,625	2,053,532
1998	6,566,069	1,331,782	80,243	5,154,044	887,066	3,646,020	2,032,983
1999	6,556,634	1,308,062	79,291	5,169,281	847,063	3,690,970	2,018,601
2000	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
2001	6,688,489	1,264,463	78,255	5,345,771	881,836	3,811,494	1,995,159
2002	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284

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

CONTACT: Art Kahn (410) 965-0186.

Table 7.B1—Number of recipients of federally administered payments, December 2002, and total payments for calendar year 2002, by state or other area and eligibility category, 2002

State or area	Number				Total payments (thousands of dollars)			
	Total	Aged	Blind ^a	Disabled ^b	Total	Aged	Blind	Disabled
All areas ^c	6,787,857	1,251,528	77,658	5,458,671	33,718,999	4,802,792	416,454	28,499,771
Alabama	163,740	22,729	1,073	139,938	729,691	46,992	4,503	678,196
Alaska	9,658	1,568	114	7,976	43,872	4,536	532	38,804
Arizona	88,054	13,248	933	73,873	406,474	42,264	4,513	359,697
Arkansas	85,107	12,108	926	72,073	354,418	21,938	3,885	328,595
California	1,135,834	342,142	21,995	771,697	7,230,494	1,916,620	152,555	5,161,319
Colorado	53,689	8,663	550	44,476	243,234	28,159	2,533	212,542
Connecticut	50,368	6,960	494	42,914	236,055	25,035	2,412	208,608
Delaware	12,565	1,327	113	11,125	56,374	3,562	508	52,303
District of Columbia	20,221	2,281	190	17,750	102,083	6,897	906	94,280
Florida	396,976	95,691	3,237	298,048	1,814,408	332,735	14,353	1,467,319
Georgia	198,599	30,900	2,192	165,507	854,414	71,567	9,774	773,073
Hawaii	21,566	6,597	190	14,779	110,657	27,765	972	81,920
Idaho	19,394	1,782	200	17,412	86,514	4,191	889	81,434
Illinois	252,200	31,450	2,418	218,332	1,246,787	118,951	11,463	1,116,373
Indiana	90,893	6,596	1,031	83,266	423,503	16,275	4,464	402,764
Iowa	41,596	4,058	812	36,726	175,290	9,257	3,223	162,810
Kansas	37,063	3,566	383	33,114	164,412	9,508	1,690	153,215
Kentucky	176,768	16,635	1,374	158,759	802,898	35,992	6,086	760,820
Louisiana	166,884	21,945	1,832	143,107	760,944	49,897	8,081	702,965
Maine	30,935	2,987	230	27,718	130,762	5,449	962	124,351
Maryland	89,705	15,542	725	73,438	434,761	53,833	3,434	377,494
Massachusetts	167,027	45,024	4,059	117,944	849,101	181,946	22,116	645,039
Michigan	213,568	18,173	1,835	193,560	1,065,066	58,725	8,694	997,646
Minnesota	67,011	9,903	719	56,389	303,433	33,029	3,254	267,140
Mississippi	127,123	19,134	1,159	106,830	542,847	38,905	4,816	499,126
Missouri	114,127	11,271	973	101,883	515,040	27,038	4,248	483,754
Montana	14,220	1,260	134	12,826	62,959	2,676	587	59,696
Nebraska	21,659	2,265	241	19,153	92,870	5,530	1,068	86,271
Nevada	29,154	7,569	698	20,887	132,907	25,542	3,639	103,726
New Hampshire	12,316	958	129	11,229	55,785	2,447	555	52,783
New Jersey	148,115	33,957	1,040	113,118	721,272	133,124	4,877	583,271
New Mexico	48,790	8,761	536	39,493	216,882	23,626	2,427	190,829
New York	625,234	136,363	3,194	485,677	3,407,767	596,273	16,101	2,795,394
North Carolina	192,595	30,031	2,009	160,555	797,987	64,225	8,432	725,330
North Dakota	8,090	1,203	83	6,804	31,784	2,724	352	28,709
Ohio	241,476	16,383	2,142	222,951	1,189,946	48,894	9,877	1,131,175
Oklahoma	73,630	9,520	812	63,298	327,859	21,925	3,687	302,247
Oregon	56,218	7,580	633	48,005	262,681	23,982	2,896	235,803
Pennsylvania	301,981	34,156	2,374	265,451	1,550,661	111,299	11,614	1,427,748
Rhode Island	28,747	4,349	204	24,194	146,253	15,748	915	129,590
South Carolina	105,888	14,860	1,535	89,493	454,062	32,147	6,541	415,374
South Dakota	12,666	1,852	105	10,709	52,252	3,923	470	47,858
Tennessee	161,673	20,160	1,660	139,853	705,106	42,089	7,428	655,588
Texas	435,844	112,708	6,044	317,092	1,797,304	307,738	26,644	1,462,923
Utah	21,003	2,124	261	18,618	97,817	7,466	1,252	89,099
Vermont	12,711	1,416	109	11,186	55,462	3,034	497	51,932
Virginia	132,176	22,984	1,396	107,796	574,659	67,052	6,062	501,545
Washington	105,520	14,074	937	90,509	539,761	58,512	4,567	476,682
West Virginia	74,022	4,952	593	68,477	348,553	10,370	2,685	335,497
Wisconsin	87,128	9,089	965	77,074	386,334	23,509	4,274	358,551
Wyoming	5,663	525	53	5,085	24,680	968	226	23,486
Outlying area								
Northern Mariana Islands	654	146	14	494	3,358	638	64	2,657

a. Includes approximately 17,900 blind persons aged 65 or older.

b. Includes approximately 725,900 disabled persons aged 65 or older.

c. Includes data not distributed by state.

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

CONTACT: Art Kahn (410) 965-0186 or Stella M. Coleman (410) 965-0157.

7.B SSI: State Data

Table 7.B2—Number of recipients of state-administered supplementation, December 2002, and total payments for calendar year 2002, by state and eligibility category, 2002

State	Number				Total payments (thousands of dollars)			
	Total ^a	Aged	Blind	Disabled	Total ^a	Aged	Blind	Disabled
All applicable states	552,567	138,851	4,527	332,044	847,845	282,762	9,955	496,634
Alabama	590	232	8	350	414	162	5	247
Alaska	15,329	4,827	86	10,416	55,648	16,836	333	38,479
Arizona	457	...	...	457	374	...	...	374
Colorado	32,848	24,547	14	8,287	88,309	62,990	42	25,277
Connecticut	18,485	5,557	109	12,819	83,391	29,679	582	53,130
Florida	15,224	6,619	6	8,599	9,707	3,728	6	5,943
Idaho	11,184	2,083	26	9,075	7,510	1,161	20	6,329
Illinois	32,986	7,369	146	25,471	29,098	7,875	171	21,052
Indiana	1,140	525	6	609	3,780	1,397	14	2,369
Iowa	4,458	1,097	...	3,361	15,779	^b	^b	^b
Kentucky	4,657	1,845	33	2,779	18,606	7,350	84	11,172
Louisiana	5,044	^b	^b	^b	476	^b	^b	^b
Maine	32,557	4,856	95	27,606	7,342	1,680	34	5,628
Maryland	2,973	^b	^b	^b	7,524	^b	^b	^b
Michigan	65,337	^b	^b	^b	32,043	^b	^b	^b
Minnesota	38,579	7,935	167	30,477	85,888	9,846	226	75,816
Missouri ^c	8,969	3,041	877	5,051	26,288	8,890	3,621	13,777
Nebraska	5,574	1,327	47	4,200	6,307	1,395	19	4,893
New Hampshire	16,784	8,174	339	8,271	11,597	1,828	761	9,008
New Mexico	177	^b	^b	^b	171	^b	^b	^b
North Carolina	24,025	12,958	107	10,960	139,951	70,975	742	68,234
North Dakota ^c	355	151	1	203	1,932	831	15	1,086
Oklahoma	72,771	20,527	489	51,755	37,436	9,262	265	27,909
Oregon	16,972	4,710	706	11,556	20,276	17,811	385	2,080
South Carolina	3,276	1,666	13	1,597	11,779	5,695	58	6,026
South Dakota	3,641	^b	^b	^b	2,501	^b	^b	^b
Texas	5,160	2,561	14	3,376	1,959	987	34	938
Virginia	6,252	2,862	14	3,376	19,072	8,107	45	10,920
Washington	20	5	^b	14	228	22	^b	205
Wisconsin	104,001	13,315	1,118	10,108	121,786	14,210	2,485	105,091
Wyoming	2,769	62	32	2,675	673	15	7	651

a. Includes data not distributed by category.

b. Data not available.

c. Excludes optional supplementation data.

SOURCE: Data reported to the Social Security Administration by individual states.

NOTES: All data are subject to revision.

... = not applicable.

CONTACT: Alfreda Brooks (410) 965-9849.

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2002

State or area	Total		Federal SSI		State supplementation		Number with—		
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)	Federal SSI only	Federal SSI and state supplementation ^a	State supplementation only ^a
All areas	6,787,857	407.42	6,505,227	376.76	2,461,652	127.53	4,326,205	2,179,022	282,630
Alabama	163,740	354.57	163,740	354.56	...	...	163,730	...	...
Alaska	9,658	372.52	9,658	372.49	...	...	9,656	...	...
Arizona	88,054	385.48	88,054	385.41	...	...	88,008	...	...
Arkansas	85,107	335.52	85,107	335.50	13	90.20	85,094	13	b
California	1,135,834	529.10	946,408	392.19	1,134,846	202.01	988	945,420	189,426
Colorado	53,689	365.51	53,689	365.47	...	...	53,668	...	...
Connecticut	50,368	386.89	50,368	386.87	...	...	50,352	...	...
Delaware	12,565	371.53	12,416	368.75	718	125.08	11,847	569	149
District of Columbia	20,221	406.87	20,084	395.65	1,718	162.97	18,503	1,581	137
Florida	396,976	376.81	396,976	376.80	122	58.49	396,854	122	b
Georgia	198,599	349.78	198,598	349.77	49	82.19	198,550	48	b
Hawaii	21,566	421.71	20,768	389.60	20,076	50.28	1,490	19,278	798
Idaho	19,394	361.98	19,394	361.95	...	...	19,383	...	...
Illinois	252,200	411.21	252,200	411.20	...	...	252,184	...	...
Indiana	90,893	378.02	90,893	378.01	...	...	90,882	...	...
Iowa	41,596	347.52	41,311	344.08	1,660	146.28	39,936	1,375	285
Kansas	37,063	363.69	37,062	363.69	16	36.62	37,047	15	b
Kentucky	176,768	373.37	176,768	373.37	...	...	176,760	...	...
Louisiana	166,884	369.97	166,882	369.97	33	51.57	166,851	31	b
Maine	30,935	342.19	30,935	342.19	...	...	30,924	...	...
Maryland	89,705	389.13	89,704	389.12	39	43.21	89,666	38	b
Massachusetts	167,027	420.70	148,933	380.56	166,744	81.58	283	148,650	18,094
Michigan	213,568	407.98	209,585	405.60	17,795	119.93	195,773	13,812	3,983
Minnesota	67,011	377.94	67,011	377.92	...	...	66,997	...	...
Mississippi	127,123	348.30	127,121	348.30	24	63.89	127,099	22	b
Missouri	114,127	367.24	114,126	367.24	...	...	114,113	...	...
Montana	14,220	359.20	14,120	356.81	885	78.25	13,335	785	100
Nebraska	21,659	349.13	21,659	349.11	...	...	21,655	...	...
Nevada	29,154	377.29	28,328	372.98	8,166	52.38	20,988	7,340	826
New Hampshire	12,316	360.29	12,316	360.24	...	...	12,303	...	...
New Jersey	148,115	397.58	140,827	371.98	147,438	44.52	677	140,150	7,288
New Mexico	48,790	359.33	48,790	359.31	...	...	48,783	...	...
New York	625,234	444.57	580,233	400.51	620,174	73.51	5,060	575,173	45,001
North Carolina	192,595	336.08	192,594	336.08	...	...	192,564	...	...
North Dakota	8,090	321.04	8,090	321.01	...	...	8,089	...	...
Ohio	241,476	401.15	241,475	401.14	40	58.29	241,436	39	b
Oklahoma	73,630	360.98	73,630	360.95	...	...	73,612	...	...
Oregon	56,218	379.50	56,218	379.47	...	...	56,188	...	...
Pennsylvania	301,981	418.68	289,405	397.16	296,947	38.98	5,034	284,371	12,576
Rhode Island	28,747	413.97	26,064	378.27	28,715	70.67	32	26,032	2,683
South Carolina	105,888	348.73	105,888	348.73	...	...	105,873	...	...
South Dakota	12,666	338.04	12,666	338.02	10	29.80	12,656	10	b
Tennessee	161,673	356.22	161,672	356.22	26	73.08	161,647	25	b
Texas	435,844	338.88	435,843	338.87	...	...	435,807	...	...
Utah	21,003	378.92	20,998	378.81	1,623	2.56	19,380	1,618	5
Vermont	12,711	363.86	11,460	337.84	12,674	59.88	37	11,423	1,251
Virginia	132,176	355.15	132,176	355.15	...	...	132,160	...	...
Washington	105,520	404.33	105,504	404.31	730	163.76	104,790	714	16
West Virginia	74,022	383.65	74,022	383.65	...	...	74,015	...	...
Wisconsin	87,128	368.03	87,128	368.03	...	...	87,120	...	...
Wyoming	5,663	353.70	5,663	353.70	...	...	5,660	...	...
Outlying area									
Northern Mariana Islands	654	434.16	654	433.83	...	...	653	...	...

a. Includes data not distributed by state.

b. Not shown for 3 or fewer recipients.

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

NOTE: ... = not applicable.

CONTACT: Art Kahn (410) 965-0186.

7.B SSI: State Data

Table 7.B7—Total payments, by state or other area and source of payment, 2002 (in thousands of dollars)

State or area	Total	Federal SSI	State supplementation	
			Federally administered	State administered
All areas	34,566,844	29,898,765	3,820,234	847,845
Alabama	730,105	729,691	...	414
Alaska	99,520	43,872	...	55,648
Arizona	406,848	406,474	...	374
Arkansas	354,418	354,412	6	...
California	7,230,494	4,460,666	2,769,828	...
Colorado	331,543	243,234	...	88,309
Connecticut	319,446	236,055	...	83,391
Delaware	56,374	55,350	1,024	...
District of Columbia	102,083	98,518	3,564	...
Florida	1,824,115	1,814,392	15	9,707
Georgia	854,414	854,411	3	...
Hawaii	110,657	98,495	12,163	...
Idaho	94,024	86,514	...	7,510
Illinois	1,275,885	1,246,787	...	29,098
Indiana	427,283	423,503	...	3,780
Iowa	191,069	172,391	2,899	15,779
Kansas	164,412	164,412	...	...
Kentucky	821,504	802,898	...	18,606
Louisiana	761,420	760,944	...	476
Maine	138,104	130,762	...	7,342
Maryland	442,285	434,752	9	7,524
Massachusetts	849,101	683,294	165,807	...
Michigan	1,097,109	1,039,390	25,676	32,043
Minnesota	389,321	303,424	10	85,888
Mississippi	542,847	542,845	2	...
Missouri	541,328	515,040	...	26,288
Montana	62,959	62,136	823	...
Nebraska	99,177	92,870	...	6,307
Nevada	132,907	127,780	5,128	...
New Hampshire	67,382	55,785	...	11,597
New Jersey	721,272	640,486	80,786	...
New Mexico	217,053	216,882	...	171
New York	3,407,767	2,849,925	557,842	...
North Carolina	937,938	797,987	...	139,951
North Dakota	33,716	31,784	...	1,932
Ohio	1,189,946	1,189,936	10	...
Oklahoma	365,295	327,859	...	37,436
Oregon	282,957	262,681	...	20,276
Pennsylvania	1,550,661	1,406,743	143,917	...
Rhode Island	146,253	121,290	24,963	...
South Carolina	465,841	454,062	...	11,779
South Dakota	54,753	52,246	5	2,501
Tennessee	705,106	705,106	0.286	...
Texas	1,799,263	1,797,304	...	1,959
Utah	97,817	97,756	60	...
Vermont	55,462	46,161	9,301	...
Virginia	593,731	574,659	...	19,072
Washington	539,989	523,340	16,421	228
West Virginia	348,553	348,553	...	...
Wisconsin	508,120	386,334	...	121,786
Wyoming	25,353	24,680	...	673
Outlying area				
Northern Mariana Islands	3,358	3,358	...	...

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

NOTE: ... = not applicable.

CONTACT: Stella M. Coleman (410) 965-0157 and Alfreda Brooks (410) 965-9849.

Table 7.B8—Number of blind and disabled recipients of federally administered payments under age 18, by state or other area, December 2002

State or area	Total	Blind	Disabled
All areas	914,821	6,762	908,059
Alabama	26,695	54	26,641
Alaska	1,015	9	1,006
Arizona	14,344	107	14,237
Arkansas	14,273	92	14,181
California	89,118	1,726	87,392
Colorado	6,578	35	6,543
Connecticut	6,058	56	6,002
Delaware	2,828	10	2,818
District of Columbia	3,650	14	3,636
Florida	72,031	225	71,806
Georgia	29,542	226	29,316
Hawaii	1,358	22	1,336
Idaho	3,302	39	3,263
Illinois	40,913	181	40,732
Indiana	17,792	111	17,681
Iowa	6,015	85	5,930
Kansas	6,406	39	6,367
Kentucky	24,022	68	23,954
Louisiana	28,471	116	28,355
Maine	3,088	20	3,068
Maryland	13,759	44	13,715
Massachusetts	16,215	469	15,746
Michigan	34,435	123	34,312
Minnesota	9,050	64	8,986
Mississippi	20,282	50	20,232
Missouri	17,612	70	17,542
Montana	1,832	11	1,821
Nebraska	3,416	25	3,391
Nevada	4,781	112	4,669
New Hampshire	1,708	18	1,690
New Jersey	20,349	70	20,279
New Mexico	5,860	39	5,821
New York	67,760	179	67,581
North Carolina	31,431	169	31,262
North Dakota	943	8	935
Ohio	40,752	229	40,523
Oklahoma	10,842	99	10,743
Oregon	7,271	84	7,187
Pennsylvania	47,272	172	47,100
Rhode Island	3,539	11	3,528
South Carolina	17,341	167	17,174
South Dakota	1,933	6	1,927
Tennessee	21,514	160	21,354
Texas	56,450	784	55,666
Utah	3,660	35	3,625
Vermont	1,358	11	1,347
Virginia	19,587	104	19,483
Washington	12,446	82	12,364
West Virginia	7,937	57	7,880
Wisconsin	15,001	68	14,933
Wyoming	836	3	833
Outlying area			
Northern Mariana Islands	147	4	143

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

CONTACT: Art Kahn (410) 965-0186.

7.B SSI: State Data

Table 7.B9—Number of federally administered awards, by state or other area, eligibility category, and age, 2002

State or area	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All areas	818,050	112,950	5,750	699,350	169,130	533,470	115,450
Alabama	21,680	1,720	70	19,890	4,570	15,360	1,750
Alaska	1,730	200	0	1,530	390	1,140	200
Arizona	13,050	1,230	90	11,730	2,530	9,240	1,280
Arkansas	12,200	940	120	11,140	2,870	8,370	960
California	112,570	32,100	1,120	79,350	16,360	63,550	32,660
Colorado	6,700	850	40	5,810	1,490	4,360	850
Connecticut	5,950	690	50	5,210	1,150	4,110	690
Delaware	2,230	220	10	2,000	640	1,360	230
District of Columbia	2,930	290	0	2,640	750	1,890	290
Florida	55,560	11,270	340	43,950	13,940	30,060	11,560
Georgia	23,940	2,340	110	21,490	4,900	16,620	2,420
Hawaii	3,140	680	10	2,450	320	2,130	690
Idaho	3,140	210	0	2,930	700	2,220	220
Illinois	30,430	2,700	300	27,430	8,190	19,490	2,750
Indiana	13,220	630	110	12,480	3,180	9,410	630
Iowa	5,970	480	60	5,430	1,330	4,150	490
Kansas	5,650	380	30	5,240	1,430	3,840	380
Kentucky	17,590	1,190	50	16,350	3,720	12,650	1,220
Louisiana	20,180	1,580	180	18,420	5,220	13,380	1,580
Maine	3,780	230	30	3,520	540	3,010	230
Maryland	11,260	1,440	70	9,750	2,360	7,430	1,470
Massachusetts	17,980	2,390	190	15,400	3,040	12,510	2,430
Michigan	25,830	1,560	70	24,200	6,420	17,800	1,610
Minnesota	8,660	800	70	7,790	1,930	5,930	800
Mississippi	13,960	1,090	60	12,810	3,450	9,390	1,120
Missouri	15,690	810	70	14,810	3,250	11,610	830
Montana	2,060	130	0	1,930	350	1,580	130
Nebraska	3,570	280	10	3,280	780	2,510	280
Nevada	5,790	850	60	4,880	820	4,120	850
New Hampshire	2,380	120	20	2,240	310	1,950	120
New Jersey	17,910	3,200	90	14,620	3,540	11,120	3,250
New Mexico	6,590	880	10	5,700	1,070	4,580	940
New York	58,860	11,700	180	46,980	10,450	36,140	12,270
North Carolina	25,290	2,070	190	23,030	5,530	17,640	2,120
North Dakota	1,060	150	10	900	140	770	150
Ohio	24,270	1,430	130	22,710	5,730	17,070	1,470
Oklahoma	10,030	980	50	9,000	2,230	6,810	990
Oregon	8,610	1,170	70	7,370	1,320	6,110	1,180
Pennsylvania	39,000	3,730	220	35,050	9,790	25,420	3,790
Rhode Island	3,010	350	10	2,650	560	2,090	360
South Carolina	11,960	950	100	10,910	2,830	8,160	970
South Dakota	1,480	240	30	1,210	320	920	240
Tennessee	18,750	1,640	150	16,960	3,630	13,460	1,660
Texas	67,820	10,140	830	56,850	13,710	43,810	10,300
Utah	3,170	310	30	2,830	670	2,150	350
Vermont	1,500	140	0	1,360	280	1,080	140
Virginia	15,400	1,610	160	13,630	3,350	10,420	1,630
Washington	14,430	1,350	60	13,020	2,630	10,410	1,390
West Virginia	8,210	540	30	7,640	1,420	6,240	550
Wisconsin	11,170	900	60	10,210	2,850	7,410	910
Wyoming	660	70	0	590	140	450	70
Outlying area							
Northern Mariana Islands	50	0	0	50	10	40	0

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

CONTACT: Clark Pickett (410) 965-9016.

Table 7.C1—Number and percentage distribution of adult individuals and persons under age 18 receiving federal SSI payments, by monthly payment and eligibility category, December 2002

Monthly payment (dollars)	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
Total					
Number	5,987,811	918,733	61,215	4,095,672	912,191
Percent	100.0	100.0	100.0	100.0	100.0
Less than 50.00	8.8	14.7	9.0	8.9	2.4
50.00–99.99	6.4	11.1	6.1	6.6	1.2
100.00–149.99	5.3	10.0	5.0	5.1	1.4
150.00–199.99	4.4	8.2	4.3	4.1	1.7
200.00–249.99	4.1	6.1	4.8	4.1	1.9
250.00–299.99	3.3	5.0	3.2	3.1	2.4
300.00–349.99	2.8	3.4	2.8	2.7	2.7
350.00–399.99	7.0	10.4	8.4	6.2	7.1
400.00–449.99	2.1	1.6	1.9	1.7	4.8
450.00–499.99	2.1	1.1	1.5	1.5	6.1
500.00–544.99	1.7	0.7	1.4	1.3	4.8
545.00 ^a	51.8	27.6	51.6	54.8	63.4

a. Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$545 in calendar year 2002.

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

CONTACT: Art Kahn (410) 965-0186.

Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by monthly payment and eligibility category, December 2002

Monthly payment (dollars)	All recipients	Aged	Blind	Disabled
Total				
Number	258,957	120,756	2,682	135,519
Percent	100.0	100.0	100.0	100.0
Less than 50.00	4.1	4.5	3.2	3.8
50.00–99.99	4.7	4.8	3.5	4.6
100.00–149.99	4.7	4.7	4.0	4.8
150.00–199.99	4.7	4.6	3.8	4.9
200.00–249.99	4.4	4.1	4.4	4.7
250.00–299.99	4.1	3.3	3.7	4.7
300.00–349.99	3.9	2.9	3.8	4.8
350.00–399.99	3.3	2.5	4.2	4.1
400.00–449.99	2.5	2.3	2.8	2.7
450.00–499.99	2.2	2.0	1.8	2.3
500.00–549.99	6.4	10.0	4.1	3.1
550.00–599.99	1.6	1.4	2.0	1.8
600.00–649.99	1.5	1.2	1.7	1.7
650.00–699.99	1.2	1.1	1.5	1.3
700.00–749.99	1.0	1.2	1.1	0.9
750.00–799.99	1.0	1.3	1.3	0.7
800.00–816.99	0.3	0.3	0.4	0.3
817.00 ^a	48.3	47.8	52.7	48.7

a. Couples living in their own household with no countable income were eligible for a federal SSI payment of \$817 in calendar year 2002.

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

CONTACT: Art Kahn (410) 965-0186.

7.D SSI: Other Income Sources

Table 7.D1—Persons receiving federally administered payments and other income and their average monthly income, by type of income, eligibility category, and age, December 2002

Type of income	Category				Age		
	Total	Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284
	Number						
With unearned income							
Social Security benefits	2,406,327	723,022	26,600	1,656,705	64,644	1,189,238	1,152,445
Other	793,012	234,491	8,728	549,793	166,884	316,436	309,692
With earned income	278,007	18,452	5,148	254,407	3,468	245,984	28,555
	Percentage						
With unearned income							
Social Security benefits	35.5	57.8	34.3	30.3	7.1	30.7	57.8
Other	11.7	18.7	11.2	10.1	18.2	8.2	15.5
With earned income	4.1	1.5	6.6	4.7	0.4	6.3	1.4
	Average income (dollars)						
With unearned income							
Social Security benefits	413.96	412.46	430.55	414.35	188.05	430.83	409.22
Other	129.18	100.71	113.56	141.57	191.63	124.29	100.53
With earned income	316.79	309.92	567.53	312.21	337.61	324.03	251.90

a. Includes approximately 17,900 blind and 725,900 disabled persons aged 65 or older.

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

NOTE: See section SSI: History of Provisions for discussion of income.

CONTACT: Art Kahn (410) 965-0186.

Table 7.D2—Percentage of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by state or other area, eligibility category, and age, December 2002

State or area	Percentage with Social Security benefits							Average monthly Social Security benefit (dollars)							
	Total	Category			Age			Total	Category			Age			
		Aged	Blind	Disabled	Under 18	18–64	65 or older		Aged	Blind	Disabled	Under 18	18–64	65 or older	
All areas	35.5	57.8	34.3	30.3	7.1	30.7	57.8	413.96	412.46	430.55	414.35	188.05	430.83	409.22	
Alabama	41.8	87.2	42.6	34.4	9.4	34.8	79.8	398.02	404.52	386.31	395.46	185.04	414.71	397.27	
Alaska	30.8	46.4	35.1	27.7	7.7	28.2	47.8	381.41	350.48	381.19	391.59	192.68	406.82	354.14	
Arizona	33.0	60.1	29.0	28.1	7.1	28.7	59.2	380.76	366.72	374.87	386.21	180.77	410.58	363.00	
Arkansas	44.3	89.9	36.3	36.8	9.7	37.1	82.9	400.34	413.50	381.69	395.18	178.70	413.38	404.14	
California	37.3	47.0	36.0	33.0	5.2	32.6	48.3	472.32	444.58	511.47	488.63	221.89	505.89	451.74	
Colorado	36.3	55.8	29.3	32.6	6.5	33.1	58.2	400.94	400.41	404.33	401.08	184.56	413.33	395.40	
Connecticut	30.4	44.1	25.5	28.2	8.1	28.2	47.1	386.53	374.13	375.44	389.79	179.85	405.54	374.55	
Delaware	33.8	66.6	37.2	29.8	6.6	33.6	66.2	406.11	410.57	399.11	405.01	222.38	419.49	406.88	
District of Columbia	26.5	66.5	24.2	21.4	5.5	19.7	60.7	394.13	389.20	438.30	395.57	223.70	415.93	387.99	
Florida	34.1	51.0	32.7	28.6	7.6	31.7	51.3	386.48	381.43	386.71	389.36	189.47	410.32	381.38	
Georgia	40.0	76.8	32.8	33.2	6.8	32.6	72.9	405.67	412.06	384.26	403.18	200.66	418.95	403.68	
Hawaii	31.5	41.0	30.0	27.4	6.1	26.8	42.2	413.75	380.46	466.03	435.27	168.88	452.75	385.32	
Idaho	36.8	78.7	31.0	32.6	7.5	35.0	75.8	402.25	416.25	386.21	398.96	184.48	410.90	408.40	
Illinois	23.8	40.8	24.5	21.3	6.0	21.6	42.3	383.51	378.10	381.69	385.03	184.68	399.32	381.92	
Indiana	32.4	74.1	31.9	29.2	7.1	32.1	69.4	393.13	404.72	385.81	390.89	178.39	403.16	401.70	
Iowa	39.5	74.6	39.9	35.6	7.5	37.8	72.1	405.37	422.77	400.49	401.47	172.85	410.19	415.41	
Kansas	36.3	65.8	30.3	33.2	8.1	36.1	63.8	398.12	413.71	361.73	395.18	177.69	406.88	407.26	
Kentucky	35.6	83.8	33.3	30.6	9.1	29.3	74.1	386.35	395.99	366.10	383.78	162.94	401.02	385.80	
Louisiana	35.4	81.5	36.2	28.3	7.4	27.5	74.0	385.17	395.56	374.44	380.77	198.52	395.94	388.64	
Maine	44.6	87.9	39.6	40.0	12.3	39.1	82.2	406.35	424.47	386.07	402.22	142.24	413.34	414.67	
Maryland	29.2	45.6	29.1	25.8	6.3	26.1	48.4	396.46	389.13	393.94	399.23	206.33	415.55	388.85	
Massachusetts	37.5	57.2	42.1	29.9	9.8	32.9	56.5	451.37	457.27	470.43	446.13	182.83	458.39	458.35	
Michigan	30.4	57.5	31.5	27.8	7.2	28.7	58.8	407.84	415.45	409.58	406.34	178.27	419.62	411.95	
Minnesota	32.5	51.9	27.0	29.1	6.9	31.2	50.7	391.92	397.58	378.37	390.31	174.80	401.62	392.80	
Mississippi	42.9	89.0	41.6	34.7	8.8	34.1	80.2	392.11	400.45	376.77	388.47	180.85	408.41	391.38	
Missouri	37.6	76.7	36.4	33.3	8.5	34.5	71.9	393.28	407.48	380.94	389.79	177.83	402.56	398.51	
Montana	39.4	81.1	36.6	35.3	6.9	35.7	77.8	407.25	419.53	384.57	404.73	188.58	414.98	407.37	
Nebraska	40.2	73.7	34.0	36.3	8.1	39.5	70.0	403.30	419.78	381.63	399.59	184.42	409.68	412.02	
Nevada	33.4	58.6	35.7	24.2	5.6	29.6	57.9	432.65	438.44	463.11	426.07	180.23	441.04	438.54	
New Hampshire	37.7	67.5	35.7	35.1	11.8	36.4	67.8	403.45	386.70	399.03	406.25	173.59	420.48	397.22	
New Jersey	32.1	42.7	32.3	28.9	6.8	30.1	45.5	413.17	398.97	411.81	419.47	208.67	437.11	401.19	
New Mexico	39.8	73.2	33.4	32.5	6.7	30.7	68.9	380.09	372.80	365.70	383.94	194.08	401.80	369.58	
New York	31.5	44.8	36.2	27.7	6.2	27.1	45.7	437.18	421.78	435.92	444.19	192.98	466.66	420.87	
North Carolina	44.0	84.3	35.9	36.5	8.2	37.3	78.1	397.57	406.65	386.06	393.80	188.19	413.45	395.41	
North Dakota	45.9	81.0	36.1	39.8	6.0	41.5	75.0	392.88	401.95	371.51	389.86	166.61	397.77	394.55	
Ohio	27.5	61.2	28.7	25.0	6.6	25.6	60.0	383.27	394.46	376.42	381.34	175.13	393.09	389.86	
Oklahoma	37.2	79.8	31.4	30.9	6.5	30.7	73.6	392.09	404.42	379.17	387.48	188.41	399.53	395.20	
Oregon	35.0	56.7	32.7	31.6	5.9	33.3	57.5	404.75	407.36	373.92	404.43	191.08	413.62	402.33	
Pennsylvania	31.6	65.6	34.1	27.2	7.1	27.5	61.8	421.50	447.37	412.35	413.57	178.34	429.81	431.06	
Rhode Island	39.6	63.9	41.7	35.2	8.8	36.3	62.1	446.80	475.56	436.09	437.53	179.55	452.64	456.61	
South Carolina	41.0	86.1	37.3	33.6	7.7	33.4	78.0	393.43	398.36	379.67	391.60	192.67	408.86	391.43	
South Dakota	42.1	72.9	35.2	36.8	7.6	39.5	68.8	389.75	417.90	383.86	380.17	160.65	394.51	398.46	
Tennessee	40.3	85.2	32.1	34.0	8.3	32.9	76.3	395.31	404.28	377.56	392.27	185.53	408.16	393.62	
Texas	41.2	68.8	31.2	31.5	5.4	30.3	68.3	383.63	377.13	365.53	389.00	201.04	407.16	374.60	
Utah	30.0	49.1	23.8	27.9	5.8	31.1	49.8	389.14	387.42	369.17	389.72	182.63	401.49	384.50	
Vermont	49.3	86.7	56.0	44.5	11.1	44.4	82.0	440.97	457.12	407.83	437.39	156.37	450.51	443.93	
Virginia	38.1	62.2	34.4	33.1	7.8	33.8	62.7	395.35	400.59	382.96	393.41	180.89	408.40	395.20	
Washington	27.4	34.2	26.8	26.3	6.1	27.2	38.6	401.92	396.20	382.80	403.28	184.31	414.79	393.71	
West Virginia	32.3	83.0	31.0	28.6	9.5	26.7	70.0	387.21	405.97	388.54	383.26	169.22	395.89	391.77	
Wisconsin	35.6	68.5	29.6	31.8	6.9	34.5	65.8	401.20	410.25	398.63	398.94	179.41	408.90	408.75	
Wyoming	38.9	83.8	30.2	34.4	7.5	35.8	80.2	408.56	427.96	383.69	403.91	160.43	415.80	415.97	
Outlying area															
Northern Mariana Islands	29.2	52.7	42.9	21.9	2.7	29.2	49.7	278.44	262.01	297.83	289.08	129.25	301.47	262.01	

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

CONTACT: Art Kahn (410) 965-0186.

7.E SSI: Recipient Characteristics

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2002

Sex and age	Total	Adults			Blind and disabled children ^a
		Aged	Blind	Disabled	
All persons					
Number	818,050	112,950	4,780	526,550	173,770
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	50.6	36.9	53.3	49.1	64.0
Female	49.4	63.1	46.7	50.9	36.0
<i>Percentage distribution by age</i>					
Under 5	8.3	...	...	...	39.1
5–9	5.6	...	...	...	26.2
10–14	5.0	...	...	...	23.6
15–17	1.8	...	...	...	8.3
18–21	5.3	...	16.9	7.2	2.8
22–29	5.8	...	7.9	9.0	...
30–39	11.2	...	18.2	17.3	...
40–49	17.7	...	20.9	27.3	...
50–59	19.4	...	25.5	29.9	...
60–64	5.8	...	6.9	9.0	...
65–69	7.8	54.8	0.6	0.4	...
70–74	2.8	20.4	1.5	^b	...
75–79	1.7	12.0	0.6	^b	...
80 or older	1.8	12.8	0.8	^b	...
Male					
Number	413,900	41,650	2,550	258,410	111,290
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	9.9	...	...	...	36.7
5–9	7.7	...	...	...	28.6
10–14	6.6	...	...	...	24.5
15–17	2.1	...	...	...	7.7
18–21	6.0	...	16.5	8.4	2.5
22–29	6.2	...	7.8	9.8	...
30–39	10.6	...	19.6	16.8	...
40–49	17.1	...	23.5	27.1	...
50–59	18.2	...	26.3	28.9	...
60–64	5.5	...	4.3	8.7	...
65–69	5.9	57.0	^b	0.3	...
70–74	2.3	22.6	1.2	^b	...
75–79	1.2	11.3	0.8	^b	...
80 or older	0.9	9.1	^b	^b	...
Female					
Number	404,150	71,300	2,230	268,140	62,480
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	6.7	...	...	...	43.5
5–9	3.4	...	...	...	22.1
10–14	3.4	...	...	...	22.0
15–17	1.4	...	...	...	9.2
18–21	4.6	...	17.5	6.1	3.2
22–29	5.4	...	8.1	8.1	...
30–39	11.9	...	16.6	17.8	...
40–49	18.3	...	17.9	27.4	...
50–59	20.6	...	24.7	30.9	...
60–64	6.1	...	9.9	9.7	...
65–69	9.7	53.5	1.3	0.6	...
70–74	3.4	19.1	1.8	0.1	...
75–79	2.2	12.4	0.4	0.1	...
80 or older	2.7	14.9	1.8	^b	...

a. Includes students aged 18–21.

b. Less than 0.05 percent.

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

Table 7.E3—Number and percentage distribution of recipients of federally administered payments, by sex, age, and eligibility category, December 2002

Sex and age	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
All persons					
Number	6,787,857	1,251,528	70,896	4,550,612	914,821
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	42.0	29.9	43.4	40.9	64.3
Female	58.0	70.1	56.6	59.1	35.7
<i>Percentage distribution by age</i>					
Under 5	2.2	...	...	...	16.1
5-9	3.6	...	...	...	26.8
10-14	5.0	...	...	...	36.9
15-17	2.7	...	...	...	20.2
18-21	3.6	...	6.0	5.3	...
22-29	6.8	...	11.4	9.9	...
30-39	10.5	...	14.9	15.4	...
40-49	14.8	...	17.2	21.8	...
50-59	14.6	...	17.2	21.5	...
60-64	6.9	...	8.0	10.1	...
65-69	7.6	15.3	7.0	7.0	...
70-74	7.4	23.8	6.3	4.5	...
75-79	6.3	25.3	4.9	2.4	...
80 or older	8.0	35.7	7.1	2.1	...
Male					
Number	2,852,456	374,065	30,749	1,859,278	588,364
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	3.0	...	...	...	14.6
5-9	5.7	...	...	...	27.6
10-14	7.8	...	...	...	38.0
15-17	4.1	...	...	...	19.8
18-21	4.9	...	7.4	7.4	...
22-29	8.4	...	13.9	12.7	...
30-39	11.7	...	17.8	17.6	...
40-49	15.1	...	19.3	22.8	...
50-59	13.0	...	16.5	19.7	...
60-64	5.8	...	7.3	8.8	...
65-69	6.1	18.4	5.9	5.6	...
70-74	5.7	27.5	4.7	3.2	...
75-79	4.3	26.1	3.4	1.4	...
80 or older	4.3	28.0	3.9	0.8	...
Female					
Number	3,935,401	877,463	40,147	2,691,334	326,457
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	1.6	...	...	...	19.0
5-9	2.1	...	...	...	25.6
10-14	2.9	...	...	...	34.7
15-17	1.7	...	...	...	20.7
18-21	2.6	...	5.0	3.8	...
22-29	5.6	...	9.5	8.0	...
30-39	9.6	...	12.7	13.9	...
40-49	14.6	...	15.6	21.1	...
50-59	15.8	...	17.7	22.8	...
60-64	7.6	...	8.6	11.0	...
65-69	8.7	14.0	7.8	8.0	...
70-74	8.7	22.2	7.4	5.4	...
75-79	7.8	24.9	6.1	3.1	...
80 or older	10.8	39.0	9.5	2.9	...

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

NOTE: ... = not applicable.

CONTACT: Art Kahn (410) 965-0186.

7.E SSI: Recipient Characteristics

Table 7.E4—Number and percentage distribution of persons with representative payees receiving federally administered payments, by eligibility category and age, December 2002

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total	6,787,857	2,345,635	4,442,222	100.0	34.6	65.4
Category						
Aged	1,251,528	46,402	1,205,126	100.0	3.7	96.3
Blind	77,658	19,000	58,658	100.0	24.5	75.5
Disabled	5,458,671	2,280,233	3,178,438	100.0	41.8	58.2
Age						
Under 18	914,821	913,892	929	100.0	99.9	0.1
18–64	3,877,752	1,278,852	2,598,900	100.0	33.0	67.0
65 or older	1,995,284	152,891	1,842,393	100.0	7.7	92.3

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

CONTACT: Arthur Kahn (410) 965-0186.

Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by living arrangement, eligibility category, and age, December 2002

Living arrangement ^a	Number	Category			Age		
		Aged	Blind ^b	Disabled ^c	Under 18	18–64	65 or older
Total							
Number	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household	93.8	90.7	92.0	94.5	95.3	94.3	91.9
Another's household	4.2	7.5	5.4	3.4	3.3	3.8	5.3
Institutional care covered by Medicaid	2.1	1.8	2.6	2.1	1.4	1.9	2.7

a. As defined for determination of federal SSI payment standards.

b. Includes 17,900 persons aged 65 or older.

c. Includes 725,900 persons aged 65 or older.

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

CONTACT: Arthur Kahn (410) 965-0186.

Table 7.E6—Number of noncitizens receiving federally administered payments as a percentage of SSI recipients, by eligibility category, December 1982–2002, selected years

Year	All noncitizens		Aged		Blind and disabled	
	Number	Percentage of total SSI	Number	Percentage of total SSI	Number	Percentage of total SSI
1982	127,900	3.3	91,900	5.9	36,000	1.6
1985	210,800	5.1	146,500	9.7	64,300	2.4
1990	435,600	9.0	282,400	19.4	153,200	4.6
1991	519,660	10.2	329,690	22.5	189,970	5.2
1992	601,430	10.8	372,930	25.4	228,500	5.6
1993	683,150	11.4	416,420	28.2	266,730	5.9
1994	738,140	11.7	440,000	30.0	298,140	6.2
1995	785,410	12.1	459,220	31.8	326,190	6.3
1996	724,990	11.0	417,360	29.5	307,630	5.9
1997	650,830	10.0	367,200	27.0	283,630	5.5
1998	669,630	10.2	364,980	27.4	304,650	5.8
1999	684,930	10.4	368,330	28.2	316,600	6.0
2000	692,590	10.5	364,470	28.3	328,120	6.2
2001	695,650	10.4	364,550	28.9	331,100	6.1
2002	703,515	10.4	364,827	29.1	338,688	6.1

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

CONTACT: Paul S. Davies (410) 966-0299.

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 2002

Diagnostic group	Number				Percentage distribution			
	Total	Under age 18, blind and disabled	Aged 18–64		Total	Under age 18, blind and disabled	Aged 18–64	
			Blind	Disabled			Blind	Disabled
All recipients	4,792,526	914,821	48,541	3,829,164	100.0	100.0	100.0	100.0
Congenital anomalies	65,999	46,193	266	19,540	1.4	5.0	0.5	0.5
Endocrine, nutritional, and metabolic diseases	164,994	6,454	455	158,085	3.4	0.7	0.9	4.1
Infectious and parasitic diseases	72,499	2,790	103	69,606	1.5	0.3	0.2	1.8
Injuries	105,313	5,017	153	100,143	2.2	0.5	0.3	2.6
Mental disorders								
Mental retardation	1,093,759	242,491	962	850,306	22.8	26.5	2.0	22.2
Other	1,629,652	339,520	441	1,289,691	34.0	37.1	0.9	33.7
Neoplasms	52,699	9,383	61	43,255	1.1	1.0	0.1	1.1
Diseases of the—								
Blood and blood-forming organs	27,009	12,585	7	14,417	0.6	1.4	0	0.4
Circulatory system	189,017	4,510	848	183,659	3.9	0.5	1.7	4.8
Digestive system	38,518	4,527	22	33,969	0.8	0.5	0	0.9
Genitourinary system	43,994	2,682	170	41,142	0.9	0.3	0.4	1.1
Musculoskeletal system and connective tissue	373,402	7,873	189	365,340	7.8	0.9	0.4	9.5
Nervous system and sense organs	393,439	94,262	39,903	259,274	8.2	10.3	82.2	6.8
Respiratory system	109,609	25,897	43	83,669	2.3	2.8	0.1	2.2
Skin and subcutaneous tissue	6,855	962	18	5,875	0.1	0.1	0	0.2
Other	85,625	78,338	43	7,244	1.8	8.6	0.1	0.2
Unknown	340,143	31,337	4,857	303,949	7.1	3.4	10.0	7.9

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

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

7.F SSI: Disability

Table 7.F2—Percentage distribution of blind and disabled recipients of federally administered payments under age 65, by sex, diagnostic group, and age, December 2002

Diagnostic group	All ages	Under 5	5–12	13–17	18–21	22–29	30–39	40–49	50–59	60–64
All blind and disabled recipients										
Number	4,792,526	147,709	445,998	321,114	243,689	460,019	712,888	1,003,144	991,663	466,302
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	1.4	12.9	4.6	2.1	2.7	1.2	0.6	0.2	0.1	0.1
Endocrine, nutritional, and metabolic diseases	3.4	1.1	0.7	0.6	0.6	1.1	2.4	4.1	6.3	6.7
Infectious and parasitic diseases	1.5	0.2	0.4	0.3	0.2	0.6	2.4	2.8	1.7	0.9
Injuries	2.2	0.7	0.5	0.5	1.5	2.5	2.8	2.7	2.5	2.8
Mental disorders										
Retardation	22.8	5.9	23.8	39.8	45.8	42.6	32.0	18.4	10.2	6.5
Other	34.0	19.0	42.4	38.1	27.5	30.3	36.0	40.9	31.6	22.2
Neoplasms	1.1	1.5	1.1	0.7	0.8	0.6	0.6	1.1	1.5	1.7
Diseases of the—										
Blood and blood-forming organs	0.6	1.4	1.5	1.2	1.1	0.8	0.5	0.3	0.2	0.1
Circulatory system	3.9	1.2	0.4	0.3	0.5	0.8	1.4	3.0	7.9	13.1
Digestive system	0.8	1.7	0.3	0.2	0.2	0.3	0.5	1.1	1.2	1.0
Genitourinary system	0.9	0.4	0.3	0.3	0.6	1.0	1.2	1.2	1.1	0.8
Musculoskeletal system and connective tissue	7.8	0.8	0.8	1.0	1.2	1.8	4.0	7.7	14.8	21.9
Nervous system and sense organs	8.2	10.6	11.0	9.2	13.7	11.9	9.0	6.5	5.7	5.5
Respiratory system	2.3	6.4	2.7	1.4	0.6	0.5	0.8	1.5	3.5	5.1
Skin and subcutaneous tissue	0.1	0.2	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.1
Other	1.8	31.4	5.8	1.9	1.0	0.3	0.1	0.1	0.1	0.1
Unknown	7.1	4.9	3.6	2.5	1.8	3.4	5.6	8.3	11.4	11.3
Male										
Number	2,270,243	85,719	296,437	206,215	140,429	240,696	333,468	429,587	370,939	166,753
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	1.5	11.9	3.7	1.7	2.4	1.1	0.5	0.2	0.1	0.1
Endocrine, nutritional, and metabolic diseases	1.7	1.0	0.5	0.5	0.5	0.8	1.5	2.1	3.2	3.6
Infectious and parasitic diseases	1.8	0.2	0.3	0.2	0.2	0.6	3.0	4.0	2.5	1.3
Injuries	2.8	0.7	0.4	0.5	1.8	3.4	4.0	3.9	3.8	4.0
Mental disorders										
Retardation	25.1	6.4	22.6	37.2	44.4	42.0	33.9	20.4	11.7	7.4
Other	35.1	22.7	47.9	43.3	30.4	31.5	34.9	39.7	29.1	19.2
Neoplasms	1.0	1.4	0.9	0.6	0.8	0.6	0.5	0.9	1.6	1.8
Diseases of the—										
Blood and blood-forming organs	0.6	1.5	1.3	1.1	1.0	0.7	0.4	0.2	0.1	0.1
Circulatory system	3.8	1.1	0.3	0.2	0.5	0.8	1.4	3.2	9.7	16.0
Digestive system	0.8	1.6	0.3	0.2	0.2	0.3	0.5	1.2	1.6	1.3
Genitourinary system	0.9	0.4	0.2	0.3	0.6	1.0	1.2	1.3	1.3	0.9
Musculoskeletal system and connective tissue	5.7	0.8	0.6	0.7	0.9	1.2	3.0	6.6	13.2	20.0
Nervous system and sense organs	8.3	10.2	9.3	7.9	13.0	11.8	9.0	6.4	5.7	5.7
Respiratory system	2.0	7.1	2.6	1.3	0.5	0.3	0.4	1.0	3.2	5.5
Skin and subcutaneous tissue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other	2.1	28.1	5.4	1.8	1.0	0.4	0.1	0.1	0.1	0.1
Unknown	6.8	4.8	3.4	2.5	1.8	3.4	5.4	8.7	12.9	12.9
Female										
Number	2,522,283	61,990	149,561	114,899	103,260	219,323	379,420	573,557	620,724	299,549
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Congenital anomalies	1.3	14.3	6.4	2.8	3.1	1.3	0.6	0.2	0.1	0.1
Endocrine, nutritional, and metabolic diseases	5.0	1.1	0.9	0.9	0.8	1.4	3.1	5.6	8.2	8.4
Infectious and parasitic diseases	1.2	0.2	0.6	0.4	0.3	0.6	1.9	2.0	1.2	0.8
Injuries	1.6	0.7	0.7	0.5	1.1	1.6	1.8	1.8	1.7	2.1
Mental disorders										
Retardation	20.8	5.1	26.1	44.3	47.7	43.2	30.2	16.9	9.3	6.0
Other	33.0	13.8	31.5	28.8	23.5	29.0	37.1	41.7	33.1	23.9
Neoplasms	1.2	1.6	1.5	0.9	0.8	0.7	0.7	1.2	1.5	1.6
Diseases of the—										
Blood and blood-forming organs	0.5	1.4	1.8	1.5	1.3	0.9	0.5	0.3	0.2	0.1
Circulatory system	4.1	1.4	0.6	0.3	0.6	0.9	1.4	2.9	6.9	11.4
Digestive system	0.8	1.8	0.4	0.3	0.3	0.4	0.6	1.1	1.0	0.8
Genitourinary system	0.9	0.3	0.3	0.4	0.6	1.0	1.2	1.1	1.0	0.7
Musculoskeletal system and connective tissue	9.7	0.9	1.2	1.6	1.7	2.3	4.8	8.6	15.7	23.0
Nervous system and sense organs	8.2	11.1	14.4	11.4	14.7	12.0	9.0	6.5	5.7	5.3
Respiratory system	2.6	5.3	2.9	1.4	0.7	0.7	1.1	2.0	3.7	4.9
Skin and subcutaneous tissue	0.2	0.2	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Other	1.5	35.9	6.6	2.0	1.0	0.3	0.1	0.1	0.1	0.1
Unknown	7.3	5.0	4.1	2.5	1.8	3.5	5.7	8.0	10.4	10.5

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

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

Table 7.F3—Number of section 1619(a) and section 1619(b) participants, selected months, 1982–2002

Month	Section 1619(a) participants		Section 1619(b) participants ^a	
	Number	Percentage change from prior period	Number	Percentage change from prior period
December				
1982	287	...	5,515	...
1983	392	...	5,165	...
1984	b	b	b	b
1985	b	b	b	b
1986	b	b	b	b
1987	14,559	...	15,632	...
1988	19,920	36.8	15,625	0
1989	25,655	28.8	18,254	16.8
1990	13,994	-45.5	23,517	28.8
1991	15,531	11.0	27,264	15.9
1992	17,603	13.3	31,649	16.1
1993	20,028	13.8	35,299	11.5
1994	24,315	21.4	40,683	15.3
1995	28,060	15.4	47,002	15.5
1996	31,085	10.8	51,905	10.4
1997	34,673	11.5	57,089	10.0
1998	37,271	7.5	59,542	4.3
1999	25,528	-31.5	69,265	16.3
2000	27,542	7.9	83,572	20.7
2001	22,100	-19.8	76,455	-8.5
2002	17,271	-21.9	82,177	7.5
2000				
March	25,055	-1.9	69,545	0.4
June	25,837	3.1	77,782	11.8
September	26,180	1.3	84,199	8.2
December	27,542	5.2	83,572	-0.7
2001				
March	26,775	-2.8	78,657	-5.9
June	25,394	-5.2	77,901	-1.0
September	25,194	-0.8	78,543	0.8
December	22,100	-12.3	76,455	-2.7
2002				
March	21,417	-22.2	72,595	-13.1
June	20,922	-2.3	77,349	6.5
September	20,275	-3.1	82,373	6.5
December	17,271	-14.8	82,177	-0.2

a. Includes blind participants. Of the 82,177 participants in December 2002, 1,386 were blind.

b. Data not available.

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

NOTES: When the substantial gainful activity (SGA) level is periodically raised, SSI recipients with earnings below the increased SGA level become eligible for regular SSI benefits rather than the special cash payments under section 1619(a). This change in status is reflected in the decreases in 1619(a) participants shown in 1990, June 1999, June 2001, December 2001, and December 2002.

... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

7.F SSI: Disability

Table 7.F4—Number of section 1619(a) and section 1619(b) participants, by age, sex, and types and amounts of earned and unearned income, December 2002

Characteristic	Section 1619(a) participants		Section 1619(b) participants	
	Number	Average earnings (dollars)	Number	Average earnings (dollars)
Total	17,271	1,043	82,177	1,094
Age				
Under 18	152	966	206	^a
18–21	1,798	1,017	3,402	1,149
22–29	4,691	1,030	20,139	1,159
30–39	4,746	1,054	24,034	1,086
40–49	3,690	1,052	19,525	1,075
50–59	1,745	1,056	9,656	1,084
60–64	325	1,049	2,738	956
65 or older	124	1,047	2,477	852
Sex				
Male	9,403	1,056	42,926	1,103
Female	7,868	1,027	39,251	1,083
Earned income ^b				
Wages	16,887	1,044	80,180	1,099
Self-employment	462	987	2,618	974
Earnings level (dollars)				
Less than 400.00	...	...	10,762	267
400.00–499.00	...	...	6,223	435
500.00–599.00	...	...	7,538	529
600.00–699.00	...	...	7,042	630
700.00–899.00	3,261	848	9,608	775
900.00–1,199.00	11,276	1,019	8,016	1,016
1,200.00 or more	2,734	1,372	32,988	1,827
Unearned income ^b				
None	15,107	1,045	28,166	1,661
Social Security	623	984	50,123	737
Other pensions	29	1,026	558	902
Assistance based on need	3	870	31	1,430
Interest, dividends	1,145	1,048	5,573	987
Other	476	1,011	3,544	1,213

a. Data not available.

b. The sum of the entries may be greater than the total because some participants may receive more than one type of earned or unearned income, or both earned and unearned income.

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

NOTE: ... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

Table 7.F5—Number of section 1619(a) and section 1619(b) participants and their average monthly earnings, by state or other area, December 2002

State or area	Section 1619(a) participants		Section 1619(b) participants	
	Number	Average earnings (dollars)	Number	Average earnings (dollars)
All areas	17,271	1,043	82,177	1,094
Alabama	231	1,013	984	1,202
Alaska ^a	27	1,014	192	1,103
Arizona	186	1,007	979	1,135
Arkansas	147	1,003	872	1,029
California	3,687	1,145	7,593	1,348
Colorado	171	997	987	1,046
Connecticut ^a	167	983	1,169	959
Delaware	44	1,030	304	1,113
District of Columbia	64	997	265	1,366
Florida	636	997	3,692	1,100
Georgia	345	998	1,750	1,087
Hawaii ^a	41	1,021	172	1,007
Idaho ^a	76	995	487	936
Illinois ^a	669	996	3,173	1,056
Indiana ^a	229	994	1,670	1,008
Iowa	158	990	1,586	798
Kansas ^a	120	1,004	1,088	973
Kentucky	233	1,007	1,332	1,180
Louisiana	354	991	1,531	1,014
Maine	92	1,004	729	1,017
Maryland	285	1,000	1,411	1,206
Massachusetts	673	1,066	3,348	1,194
Michigan	618	997	3,826	1,050
Minnesota ^a	311	1,029	2,303	933
Mississippi	202	1,003	871	1,172
Missouri ^a	227	1,016	1,884	906
Montana	57	995	415	874
Nebraska ^a	101	980	660	937
Nevada ^a	58	1,035	369	1,154
New Hampshire ^a	42	969	439	995
New Jersey	382	1,027	1,961	1,244
New Mexico	113	1,020	592	1,127
New York	1,639	1,060	6,723	1,305
North Carolina	281	1,004	1,859	1,053
North Dakota ^a	35	1,007	319	755
Ohio ^a	790	998	3,743	1,002
Oklahoma ^a	171	990	712	890
Oregon ^a	127	1,022	1,007	855
Pennsylvania	888	1,023	4,051	1,072
Rhode Island	79	1,045	416	1,101
South Carolina	181	1,006	1,008	1,008
South Dakota	57	979	529	887
Tennessee	260	1,006	1,480	1,155
Texas	670	1,006	3,795	1,016
Utah ^a	71	975	503	950
Vermont	72	1,089	391	923
Virginia ^a	303	980	1,646	1,014
Washington	399	991	1,955	1,110
West Virginia	125	1,016	519	1,177
Wisconsin	344	1,041	2,652	929
Wyoming	31	1,011	224	814
Outlying area				
Northern Mariana Islands	2	821	11	1,113

a. Initial Medicaid determinations are made by the state after identification of potentially eligible persons by the Social Security Administration.

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

CONTACT: Clark Pickett (410) 965-9016.

Table 8.A1—Hospital Insurance, 1966–2002 (in millions of dollars)

Year	Receipts								Expenditures				Trust fund assets at end of year
	Total	Payroll taxes	Income from taxation of benefits	Transfers from Railroad Retirement account	Reimbursements from general revenues for—		Premiums from voluntary enrollees	Interest on investments and other income ^a	Total	Benefit payments ^b	Administrative expenses		
					Uninsured persons	Military wage credits					Amount ^c	Percentage of benefit payments	
1966	1,943	1,858	...	16	26	11	...	32	999	891	108	12.1	944
1967	3,559	3,152	...	44	301	11	...	51	3,430	3,353	77	2.3	1,073
1968	5,287	4,116	...	54	1,022	22	...	74	4,277	4,179	99	2.4	2,083
1969	5,279	4,473	...	64	617	11	...	113	4,857	4,739	118	2.5	2,505
1970	5,979	4,881	...	66	863	11	...	158	5,281	5,124	157	3.1	3,202
1971	5,732	4,921	...	66	503	48	...	193	5,900	5,751	150	2.6	3,034
1972	6,403	5,731	...	63	381	48	...	180	6,503	6,318	185	2.9	2,935
1973	10,821	9,944	...	99	451	48	2	278	7,289	7,057	232	3.3	6,467
1974	12,024	10,844	...	132	471	48	5	523	9,372	9,099	272	3.0	9,119
1975	12,980	11,502	...	138	621	48	7	664	11,581	11,315	266	2.4	10,517
1976	13,766	12,727	...	143	d	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	...	e	d 803	f 143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	...	e 214	688	141	13	834	18,178	17,682	496	2.8	11,477
1979	22,825	20,768	...	191	734	141	16	975	21,073	20,623	450	2.2	13,228
1980	26,097	23,848	...	244	697	141	18	1,149	25,577	25,064	512	2.0	13,749
1981	35,725	32,959	...	276	659	207	22	1,603	30,726	30,342	384	1.3	18,748
1982	37,998	34,586	...	351	808	207	24	2,022	36,144	35,631	513	1.4	9 8,164
1983	44,570	37,259	...	358	878	h 3,456	27	2,593	39,877	39,337	540	1.4	12,858
1984	46,720	42,288	...	351	752	250	33	3,046	43,887	43,257	629	1.5	15,691
1985	51,397	47,576	...	371	766	i -719	41	3,362	48,414	47,580	834	1.8	9 20,499
1986	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	9 39,957
1987	64,064	58,648	...	368	447	94	38	4,469	50,289	49,496	793	1.6	53,732
1988	69,239	62,449	...	364	475	80	41	5,830	53,331	52,517	815	1.6	69,640
1989	76,721	68,369	...	379	515	86	55	7,317	60,803	60,011	792	1.3	85,558
1990	80,372	72,013	...	367	413	j -993	122	8,451	66,997	66,239	758	1.1	98,933
1991	88,839	77,851	...	352	605	89	432	9,510	72,570	71,549	1,021	1.4	115,202
1992	93,836	81,745	...	374	621	86	522	10,487	85,015	83,895	1,121	1.3	124,022
1993	98,187	84,133	...	400	367	81	675	k 12,531	94,391	93,487	904	1.0	127,818
1994	109,570	95,280	1,639	413	506	80	907	10,745	104,545	103,282	1,263	1.2	132,844
1995	115,027	98,421	3,913	396	462	61	954	10,820	117,604	116,368	1,236	1.1	130,267
1996	124,603	110,585	4,069	401	419	l -2,293	1,199	10,222	129,929	128,632	1,297	1.0	124,942
1997	130,154	114,670	3,558	419	481	70	1,319	9,637	139,452	137,762	1,690	1.2	115,643
1998	140,547	124,317	5,067	419	34	67	1,316	9,327	135,771	m 133,990	1,782	1.3	120,419
1999	151,597	132,306	6,552	430	652	71	1,447	10,139	130,632	m 128,766	1,866	1.4	141,385
2000	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	m 128,458	2,636	2.1	177,475
2001	174,630	151,994	7,533	470	453	n -1,175	1,370	13,986	143,379	m 141,183	2,195	1.6	208,726
2002	178,631	152,708	8,316	425	442	0	1,626	15,114	152,526	m 149,944	2,582	1.7	234,831

- a. Other income includes recoveries of amounts reimbursed from the trust fund which are not obligations of the trust fund, receipts from the fraud and abuse control program, and a small amount of miscellaneous income.
- b. Includes costs of Peer Review Organizations from 1983 to 2001 (beginning with the implementation of the Prospective Payment System on October 1, 1983), and costs of Quality Improvement Organizations beginning in 2002.
- c. Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by P.L. 104-91.
- d. No transfer was made in 1976 because of the change in transfer dates from December to March. The 1977 transfer was for benefits and administrative expenses during the 15-month period beginning July 1976 and ending September 1977.
- e. No transfer was made in 1977 because of the change in transfer dates from August to June. The 1978 transfer was for contributions during the 15-month period beginning July 1976 and ending September 1977.
- f. Includes \$2 million in reimbursement from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II.
- g. For 1982, assets exclude \$12,437 million loaned to the OASI trust fund under the interfund borrowing provisions of the law. Repayments of \$1,824 million and \$10,613 million were made in 1985 and 1986, respectively.
- h. The lump-sum general revenue transfer, as provided for by section 151 of P.L. 98-21.
- i. Includes the lump-sum general revenue adjustment of -\$805 million, as provided for by section 151 of P.L. 98-21.
- j. Includes the lump-sum general revenue adjustment of -\$1,100 million, as provided for by section 151 of P.L. 98-21.
- k. Includes \$1,805 million transfer from the Supplementary Medical Insurance (SMI) catastrophic coverage reserve fund, as provided for by P.L. 102-394.
- l. Includes the lump-sum general revenue adjustment of -\$2,366 million, as provided for by section 151 of P.L. 98-21.
- m. Includes monies transferred to the SMI trust fund for home health agency costs, as provided for by P.L. 105-33.
- n. Includes the lump-sum general revenue adjustment of -\$1,177 million, as provided for by section 151 of P.L. 98-21.

SOURCE: 2003 Annual Report of the Board of Trustees of the Federal Hospital Insurance Trust Fund, Table II.B6, and analogous tables from earlier Annual Reports.

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

... = not applicable.

CONTACT: John Wandishin (410) 786-6389.

8.A Medicare: Trust Funds

Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2002 (in millions of dollars)

Year	Receipts						Expenditures				Trust fund assets at end of year ^a
	Total	Premiums from participants			Government contributions ^b	Interest and other income ^c	Total	Benefit payments ^d	Administrative expenses		
		Subtotal	Aged	Disabled					Amount	Percentage of benefit payments	
1966	324	322	322	...	0	2	203	128	75	58.6	122
1967	1,597	640	640	...	933	24	1,307	1,197	110	9.2	412
1968	1,711	832	832	...	858	21	1,702	1,518	184	12.1	421
1969	1,839	914	914	...	907	18	2,061	1,865	196	10.5	199
1970	2,201	1,096	1,096	...	1,093	12	2,212	1,975	237	12.0	188
1971	2,639	1,302	1,302	...	1,313	24	2,377	2,117	260	12.3	450
1972	2,808	1,382	1,382	...	1,389	37	2,614	2,325	289	12.4	643
1973	3,312	1,550	1,491	59	1,705	57	2,844	2,526	318	12.6	1,111
1974	4,124	1,804	1,664	140	2,225	95	3,728	3,318	410	12.4	1,506
1975	4,673	1,918	1,759	158	2,648	107	4,735	4,273	462	10.8	1,444
1976	5,977	2,060	1,878	183	3,810	107	5,622	5,080	542	10.7	1,799
1977	7,805	2,247	2,030	217	5,386	172	6,505	6,038	467	7.7	3,099
1978	9,056	2,470	2,221	248	6,287	299	7,755	7,252	503	6.9	4,400
1979	9,768	2,719	2,451	267	6,645	404	9,265	8,708	557	6.4	4,902
1980	10,874	3,011	2,707	304	7,455	408	11,245	10,635	610	5.7	4,530
1981	15,374	^e 3,722	^e 3,356	^e 366	^e 11,291	361	14,028	13,113	915	7.0	5,877
1982	16,580	^e 3,697	^e 3,341	^e 356	^e 12,284	599	16,227	15,455	772	5.0	6,230
1983	19,824	4,236	3,845	391	14,861	727	18,984	18,106	878	4.8	7,070
1984	23,180	5,167	4,721	445	17,054	959	20,552	19,661	891	4.5	9,698
1985	25,106	5,613	5,105	508	18,250	1,243	23,880	22,947	933	4.1	10,924
1986	24,665	5,722	5,218	504	17,802	1,141	27,299	26,239	1,060	4.0	8,291
1987	31,844	^f 7,409	^f 6,747	^f 661	^f 23,560	875	31,740	30,820	920	3.0	8,394
1988	35,825	^f 8,761	^f 7,983	^f 778	^f 26,203	861	35,230	33,970	1,260	3.7	8,990
1989	^g 44,349	^{g,h} 12,263	9,793	993	30,852	^g 1,234	^g 39,783	38,294	^g 1,489	3.9	^g 13,556
1990	45,913	11,320	10,311	1,008	33,035	1,558	43,987	42,468	1,519	3.6	15,482
1991	51,224	11,934	10,846	1,088	37,602	1,688	48,877	47,336	1,541	3.3	17,828
1992	57,237	ⁱ 14,077	ⁱ 12,814	ⁱ 1,263	ⁱ 41,359	1,801	50,830	49,260	1,570	3.2	24,235
1993	57,679	ⁱ 14,193	ⁱ 12,731	ⁱ 1,462	ⁱ 41,465	2,021	57,784	^j 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	^k 20,933	^k 18,594	^k 2,338	^k 64,068	2,711	77,630	^l 76,125	1,505	2.0	46,212
1999	80,902	^k 18,967	^k 16,604	^k 2,362	^k 59,095	2,841	82,327	^l 80,724	1,603	2.0	44,787
2000	89,903	20,555	17,892	2,664	^k 65,898	3,450	90,663	^l 88,893	1,770	2.0	44,027
2001	98,629	22,764	19,905	2,859	72,793	3,071	101,386	^l 99,663	1,723	1.7	41,270
2002	106,196	25,066	21,610	3,456	78,338	2,792	113,165	^l 110,969	2,196	2.0	34,301

- a. The financial status of the program depends on both the assets and the liabilities of the program.
- b. General fund matching payments, plus certain interest-adjustment items.
- c. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund and other miscellaneous income.
- d. Includes costs of Peer Review Organizations from 1983 through 2001 and costs of Quality Improvement Organizations beginning in 2002.
- e. Section 708 of Title VII of the Social Security Act modified the provisions for the delivery of Social Security benefit checks when the regularly designated delivery day falls on a Saturday, Sunday, or legal public holiday. Delivery of benefit checks normally due January 1982 occurred on December 31, 1981. Consequently, the SMI premiums withheld from the checks (\$264 million) and the associated general revenue contributions (\$883 million) were added to the SMI trust fund on December 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.
- f. Delivery of benefit checks normally due January 1988 occurred on December 31, 1987. Consequently, the SMI premiums withheld from the checks (\$692 million) and the associated general revenue contributions (\$2,178 million) were added to the SMI trust fund on December 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988; see footnote e.
- g. Includes the impact of the Medicare Catastrophic Coverage Act of 1988 (P.L. 100-360).
- h. Catastrophic coverage premiums—\$1.5 billion—not distributed between aged and disabled enrollees are included in total.
- i. Delivery of benefit checks normally due January 1993 occurred on December 31, 1992. Consequently, the SMI premiums withheld from the checks (\$1,089 million) and the associated general revenue contributions (\$3,175 million) were added to the SMI trust fund on December 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993; see footnote e.
- j. Includes the impact of the transfer to the HI trust fund of the SMI catastrophic coverage reserve fund on March 31, 1993, as specified in P.L. 102-394. Actual benefit payments for 1993 were \$53,979 million and the amount transferred was \$1,805 million.
- k. Delivery of benefit checks normally due January 1999 occurred on December 31, 1998. Consequently, the SMI premiums withheld from the checks (\$1,512 million) and the associated general revenue contributions (\$4,711 million) were added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for calendar year 1999; see footnote e.
- l. Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105-33.

SOURCES: 2003 Annual Report of the Board of Trustees of the Federal Supplementary Medical Insurance Fund, Table II.C6, analogous tables from earlier Annual Reports, and unpublished Treasury reports.

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

... = not applicable; SMI = Supplementary Medical Insurance.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Hospital Insurance and/or Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–1998

Type of coverage and service	1967	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1967–1998
Persons enrolled (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 (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 ^a	126	329	675	1,818	3,290	3,483	^b 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 ^a	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 ^a	7	15	27	60	100	105	^b 79	8.7
Supplementary Medical Insurance	365	536	652	832	848	816	793	2.7
Physicians' and other medical services	359	519	633	815	826	799	776	2.7
Outpatient services	77	172	269	474	559	563	562	7.1
Home health services ^a	7	7	12	1	1	2	41	6.3
Amount reimbursed (millions of dollars)								
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 ^a	26	136	440	3,406	15,056	16,960	^b 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 ^a	17	56	159	78	215	219	4,187	20.9
Amount reimbursed per person served (dollars)								
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 ^a	204	413	652	1,874	4,577	4,869	^b 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 ^a	145	347	526	2,033	4,815	4,606	3,126	11.2
Amount reimbursed per enrollee (dollars)								
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 ^a	1	6	18	112	456	510	^b 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 ^a	1	2	6	3	7	7	130	18.3

a. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

b. Hospice utilization is combined in the Part A home health services.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Hospital Insurance and/or Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–1998

Type of coverage and service	1974	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1974–1998
Persons enrolled (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 (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 ^a	15	22	105	122	293	304	^b 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 ^a	9	13	^c	^c	^c	^c	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 ^a	8	10	33	38	63	63	^b 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 ^a	5	7	^c	^c	^c	^c	29	8.3
Amount reimbursed (millions of dollars)								
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 ^a	6	10	173	264	1,478	1,641	^b 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 ^a	3	5	^c	^c	^c	^c	488	^c
Amount reimbursed per person served (dollars)								
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 ^a	399	478	1,645	2,156	5,052	5,395	^b 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 ^a	345	420	230	517	1,235	1,046	3,732	11.4
Amount reimbursed per enrollee (dollars)								
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 ^a	3	5	55	81	319	341	^b 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 ^a	2	3	^c	^c	^c	^c	109	19.9

a. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

b. Hospice utilization is combined in the Part A home health services.

c. Sample population too small to yield valid calculated results.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2002, selected years (in thousands)

Census division and state or area	1980	1990	1995	1998	1999	2000	2001	2002
Total								
All areas	25,515	30,948	33,142	33,802	33,929	34,253	34,462	34,679
United States ^a	25,027	30,350	32,492	33,120	33,240	33,549	33,743	33,947
New England	1,506	1,734	1,816	1,827	1,829	1,838	1,837	1,836
Connecticut	362	436	455	456	456	458	457	456
Maine	142	165	174	178	179	180	182	183
Massachusetts	715	795	825	827	826	829	827	824
New Hampshire	103	126	139	143	145	147	148	150
Rhode Island	125	145	149	148	148	148	147	146
Vermont	59	68	72	74	75	76	76	77
Middle Atlantic	4,496	5,084	5,267	5,259	5,264	5,282	5,277	5,276
New Jersey	851	1,006	1,058	1,064	1,065	1,070	1,070	1,071
New York	2,128	2,280	2,328	2,320	2,334	2,347	2,351	2,356
Pennsylvania	1,516	1,798	1,881	1,874	1,865	1,865	1,856	1,849
East North Central	4,462	5,224	5,500	5,527	5,526	5,552	5,560	5,567
Illinois	1,238	1,401	1,446	1,440	1,437	1,440	1,440	1,439
Indiana	579	685	725	732	732	736	738	740
Michigan	916	1,101	1,177	1,191	1,194	1,203	1,207	1,210
Ohio	1,162	1,387	1,471	1,476	1,474	1,480	1,480	1,480
Wisconsin	567	650	683	689	689	693	695	698
West North Central	2,186	2,424	2,510	2,515	2,513	2,519	2,522	2,523
Iowa	387	422	432	429	427	427	426	425
Kansas	304	337	348	348	347	347	346	345
Minnesota	479	544	570	577	579	583	586	590
Missouri	639	706	733	735	734	736	737	737
Nebraska	205	221	228	227	227	227	227	227
North Dakota	81	91	94	93	93	93	93	92
South Dakota	91	102	106	106	106	106	107	107
South Atlantic	4,179	5,536	6,091	6,307	6,330	6,410	6,474	6,542
Delaware	59	80	90	95	96	97	99	100
District of Columbia	71	71	70	67	66	66	65	64
Florida	1,579	2,174	2,396	2,477	2,473	2,493	2,511	2,531
Georgia	499	636	700	730	736	750	760	771
Maryland	381	496	542	559	562	570	576	582
North Carolina	588	786	878	917	925	939	952	965
South Carolina	279	383	428	449	454	463	470	477
Virginia	490	645	714	742	748	761	771	782
West Virginia	233	264	274	272	270	271	270	270
East South Central	1,613	1,887	2,000	2,035	2,041	2,060	2,072	2,084
Alabama	428	508	541	551	553	558	561	564
Kentucky	402	459	482	487	488	491	492	494
Mississippi	280	313	325	328	328	330	331	333
Tennessee	503	607	652	669	672	681	688	693
West South Central	2,363	2,880	3,120	3,211	3,232	3,274	3,299	3,328
Arkansas	303	343	356	357	358	359	359	360
Louisiana	380	460	488	495	495	498	498	500
Oklahoma	361	412	432	435	436	438	439	440
Texas	1,318	1,665	1,845	1,924	1,943	1,979	2,003	2,028
Mountain	1,043	1,490	1,726	1,839	1,863	1,906	1,944	1,983
Arizona	295	456	536	573	577	591	602	614
Colorado	244	324	367	389	395	403	410	416
Idaho	95	121	134	140	142	144	147	150
Montana	85	106	114	117	118	119	120	121
Nevada	65	128	172	195	200	209	218	227
New Mexico	114	160	182	193	196	200	203	207
Utah	108	147	168	176	178	183	186	189
Wyoming	38	47	54	56	57	57	58	59

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2002, selected years (in thousands)—Continued

Census division and state or area	1980	1990	1995	1998	1999	2000	2001	2002
Pacific	3,157	4,082	4,444	4,586	4,630	4,697	4,747	4,798
Alaska	11	22	28	32	33	35	36	38
California	2,346	2,990	3,241	3,348	3,385	3,436	3,474	3,509
Hawaii	74	118	138	146	148	151	153	155
Oregon	300	390	422	428	429	432	435	440
Washington	426	562	614	632	635	643	649	656
Unknown	22	10	18	14	12	11	11	10
Outlying areas	270	344	383	404	404	420	430	439
Puerto Rico	263	337	367	387	393	401	410	418
Virgin Islands	4	6	8	8	9	9	10	10
Other	3	1	8	9	2	10	10	11
Foreign countries	217	254	268	277	280	284	289	293

a. Represents beneficiaries of 50 states, District of Columbia, and those with unknown residence.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2002, selected years (in thousands)

Census division and state or area	1980	1990	1995	1998	1999	2000	2001	2002
Total								
All areas	2,963	3,255	4,393	5,023	5,212	5,367	5,563	5,810
United States ^a	2,863	3,148	4,266	4,878	5,062	5,208	5,406	5,647
New England	141	156	228	266	277	285	295	307
Connecticut	31	33	47	54	56	58	59	62
Maine	16	18	27	33	35	36	38	40
Massachusetts	64	72	108	124	128	131	135	139
New Hampshire	9	11	17	21	22	23	24	26
Rhode Island	14	14	19	22	23	24	25	26
Vermont	7	7	10	12	13	13	14	14
Middle Atlantic	493	473	603	685	713	731	755	784
New Jersey	91	86	110	124	130	133	138	142
New York	237	229	302	346	360	368	378	391
Pennsylvania	165	158	190	215	223	230	239	251
East North Central	486	561	715	782	807	823	845	877
Illinois	113	132	172	186	192	195	200	207
Indiana	63	77	99	109	113	117	120	125
Michigan	118	132	170	188	195	200	207	216
Ohio	141	156	196	213	219	221	226	233
Wisconsin	50	64	79	86	88	90	92	96
West North Central	180	211	280	317	328	338	351	370
Iowa	29	34	43	47	49	50	52	54
Kansas	22	26	35	41	42	43	45	47
Minnesota	35	44	60	67	69	72	74	78
Missouri	67	75	100	115	120	124	130	137
Nebraska	14	16	22	24	25	26	27	29
North Dakota	6	7	9	10	10	10	10	11
South Dakota	7	8	11	12	13	13	13	14
South Atlantic	545	607	834	990	1,034	1,075	1,125	1,179
Delaware	7	8	11	13	14	15	15	16
District of Columbia	8	7	8	9	9	10	10	10
Florida	147	165	232	284	298	311	328	345
Georgia	88	96	134	155	161	166	173	180
Maryland	41	46	60	69	72	75	78	82
North Carolina	91	106	149	178	186	194	203	214
South Carolina	51	59	81	96	101	105	110	115
Virginia	68	77	105	122	128	132	138	144
West Virginia	43	44	55	63	65	67	70	73
East South Central	246	287	397	462	480	495	518	543
Alabama	63	74	101	118	123	127	134	142
Kentucky	62	75	105	123	128	132	137	143
Mississippi	46	53	72	83	86	88	92	96
Tennessee	76	85	119	138	143	148	155	162
West South Central	288	317	452	514	528	539	559	584
Arkansas	45	48	67	76	78	80	83	86
Louisiana	63	71	93	101	103	104	107	112
Oklahoma	41	39	56	65	67	69	72	75
Texas	139	159	236	272	280	286	297	311
Mountain	112	148	228	267	276	284	295	312
Arizona	34	42	66	78	81	84	89	95
Colorado	24	34	54	62	64	65	66	68
Idaho	9	11	16	19	20	21	22	23
Montana	9	12	16	17	18	18	18	19
Nevada	8	13	22	28	29	30	32	35
New Mexico	15	19	28	32	33	34	35	37
Utah	9	13	20	22	23	24	25	26
Wyoming	3	4	7	8	8	8	8	9

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2002, selected years (in thousands)—Continued

Census division and state or area	1980	1990	1995	1998	1999	2000	2001	2002
Pacific	367	388	529	593	618	637	662	692
Alaska	2	3	5	6	7	7	8	8
California	284	289	392	435	452	465	481	500
Hawaii	7	9	11	13	15	15	15	17
Oregon	31	34	47	53	55	57	61	64
Washington	43	53	74	86	90	93	97	103
Unknown	4	2	1	1	1	1	1	2
Outlying areas	88	93	112	130	134	139	142	147
Puerto Rico	88	92	110	127	132	136	139	144
Virgin Islands	...	1	1	1	1	1	1	1
Other	...	...	...	2	1	2	2	2
Foreign countries	12	14	14	15	14	14	15	15

a. Represents beneficiaries of 50 states, District of Columbia, and those with unknown residence.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not available.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B4—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1980–2002, selected years (in thousands)

Age, sex, and race	1980	1985	1990	1995	1999	2000	2001	2002
<i>Hospital Insurance and/or Supplementary Medical Insurance</i>								
Total	25,515	28,176	30,948	33,142	33,929	34,253	34,463	34,680
Age								
65–69	8,459	8,956	9,695	9,517	9,077	9,167	9,201	9,274
70–74	6,756	7,441	7,951	8,756	8,656	8,609	8,564	8,480
75–79	4,809	5,453	6,058	6,563	7,232	7,285	7,285	7,292
80–84	3,081	3,463	3,957	4,470	4,735	4,870	5,022	5,173
85 or older	2,410	2,861	3,286	3,837	4,229	4,322	4,391	4,461
Sex								
Men	10,268	11,282	12,416	13,434	13,900	14,112	14,263	14,418
Women	15,247	16,894	18,532	19,708	20,029	20,141	20,199	20,261
Race								
White	22,534	24,745	26,855	29,011	29,311	29,757	29,883	29,974
All other races	2,257	2,585	3,114	3,253	4,431	4,403	4,495	4,627
Unknown	724	846	979	878	187	92	85	78
<i>Hospital Insurance</i>								
Total	25,104	27,683	30,464	32,742	33,516	33,833	34,044	34,257
Age								
65–69	8,302	8,818	9,565	9,411	8,984	9,074	9,111	9,183
70–74	6,592	7,292	7,829	8,652	8,552	8,505	8,462	8,380
75–79	4,731	5,315	5,947	6,483	7,138	7,189	7,189	7,196
80–84	3,072	3,403	3,872	4,409	4,674	4,806	4,956	5,103
85 or older	2,407	2,854	3,252	3,787	4,168	4,259	4,326	4,395
Sex								
Men	10,156	11,146	12,280	13,310	13,770	13,979	14,130	14,284
Women	14,948	16,536	18,184	19,431	19,746	19,854	19,914	19,974
Race								
White	22,244	24,424	26,591	28,822	29,131	29,570	29,700	29,792
All other races	2,160	2,444	2,931	3,127	4,206	4,176	4,264	4,392
Unknown	699	815	942	792	179	87	80	73
<i>Supplementary Medical Insurance</i>								
Total	24,680	27,311	29,686	31,742	32,403	32,590	32,749	32,934
Age								
65–69	8,156	8,607	9,008	8,830	8,349	8,330	8,340	8,401
70–74	6,570	7,277	7,740	8,430	8,315	8,256	8,200	8,107
75–79	4,684	5,333	5,942	6,431	7,043	7,088	7,083	7,090
80–84	2,981	3,381	3,879	4,392	4,651	4,782	4,926	5,068
85 or older	2,289	2,712	3,118	3,659	4,042	4,134	4,200	4,268
Sex								
Men	9,868	10,852	11,758	12,694	13,079	13,205	13,328	13,466
Women	14,813	16,459	17,927	19,048	19,324	19,384	19,420	19,468
Race								
White	21,876	24,060	25,849	27,899	28,115	28,432	28,519	28,592
All other races	2,114	2,441	2,910	3,028	4,126	4,086	4,166	4,285
Unknown	691	810	927	815	162	71	64	58

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees under age 65 who are disabled or have end stage renal disease, by program, age, sex, and race, July 1, 1980–2002, selected years

Age, sex, and race	1980		1990		2000		2001		2002	
	All disabled	End stage renal disease only	All disabled	End stage renal disease only	All disabled	End stage renal disease only	All disabled	End stage renal disease only	All disabled	End stage renal disease only
Hospital Insurance and/or Supplementary Medical Insurance										
Total	2,963,175	28,334	3,255,007	64,692	5,367,151	73,890	5,563,259	75,996	5,809,611	79,353
Age										
Under 35	371,204	8,773	483,265	16,603	522,321	13,255	520,612	13,535	532,378	13,661
35–44	369,460	5,188	654,957	14,159	1,129,288	15,084	1,137,221	15,125	1,145,800	15,363
45–54	657,486	6,977	741,200	15,800	1,627,238	22,647	1,727,392	23,511	1,797,665	24,287
55–64	1,565,025	7,396	1,375,585	18,130	2,088,304	22,904	2,178,034	23,825	2,333,768	26,042
Sex										
Men	1,870,558	14,547	2,042,944	33,647	3,014,107	40,062	3,089,887	40,989	3,194,079	43,239
Women	1,092,617	13,787	1,212,063	31,045	2,353,044	33,828	2,473,372	35,007	2,615,532	36,114
Race										
White	2,422,253	19,232	2,480,767	35,638	3,989,357	35,636	4,131,665	36,574	4,301,138	37,556
All other races	486,677	7,907	712,315	26,477	1,362,457	37,820	1,417,379	39,120	1,494,904	41,566
Unknown	54,245	1,195	61,925	2,577	15,337	434	14,215	302	13,569	231
Hospital Insurance										
Total	2,963,156	28,334	3,254,983	64,677	5,366,598	73,890	5,562,860	75,996	5,809,174	79,353
Age										
Under 35	371,199	8,773	483,262	16,601	522,123	13,255	520,537	13,535	532,284	13,661
35–44	369,458	5,188	654,953	14,157	1,129,170	15,084	1,137,135	15,125	1,145,693	15,363
45–54	657,483	6,977	741,193	15,794	1,627,107	22,647	1,727,260	23,511	1,797,555	24,287
55–64	1,565,016	7,396	1,375,575	18,125	2,088,198	22,904	2,177,928	23,825	2,333,642	26,042
Sex										
Men	1,870,543	14,547	2,042,929	33,639	3,013,803	40,062	3,089,659	40,989	3,193,844	43,239
Women	1,092,613	13,787	1,212,054	31,038	2,352,795	33,828	2,473,201	35,007	2,615,330	36,114
Race										
White	2,422,239	19,232	2,480,754	35,631	3,988,957	35,636	4,131,393	36,574	4,300,844	37,556
All other races	486,672	7,907	712,304	26,469	1,362,305	37,820	1,417,253	39,120	1,494,763	41,566
Unknown	54,245	1,195	61,925	2,577	15,336	434	14,214	302	13,567	231
Supplementary Medical Insurance										
Total	2,719,226	27,046	2,943,480	58,912	4,769,804	68,800	4,936,567	70,236	5,144,421	73,285
Age										
Under 35	339,665	8,294	441,640	14,782	466,869	12,159	465,433	12,378	474,464	12,429
35–44	337,146	4,963	586,537	12,567	998,230	13,783	1,003,828	13,669	1,007,411	13,866
45–54	596,287	6,683	666,257	14,559	1,421,904	20,961	1,507,642	21,582	1,568,114	22,343
55–64	1,446,128	7,106	1,249,046	17,004	1,882,801	21,897	1,959,664	22,607	2,094,432	24,647
Sex										
Men	1,694,569	13,887	1,833,959	30,338	2,665,252	37,037	2,728,496	37,549	2,813,277	39,551
Women	1,024,657	13,159	1,109,521	28,574	2,104,552	31,763	2,208,071	32,687	2,331,144	33,734
Race										
White	2,218,176	18,458	2,236,781	32,347	3,535,008	33,154	3,655,778	33,766	3,799,460	34,747
All other races	449,753	7,446	650,121	24,240	1,221,836	35,256	1,268,477	36,195	1,333,260	38,324
Unknown	51,297	1,142	56,578	2,325	12,960	390	12,312	275	11,701	214

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1990–2002 (in dollars)

Census division and state or area ^a	1990	1995	1997	1998	1999	2000	2001	2002 ^b
Total								
All areas ^c	1,090	1,908	2,235	2,370	2,533	2,762	3,080	3,574
United States ^d	1,081	1,920	2,252	2,388	2,554	2,787	3,108	3,608
New England	988	1,763	2,050	2,149	2,284	2,436	2,610	2,862
Connecticut	1,177	2,013	2,336	2,442	2,522	2,608	2,726	3,014
Maine	927	1,645	1,949	2,005	2,140	2,328	2,489	2,763
Massachusetts	942	1,705	1,975	2,091	2,251	2,429	2,598	2,797
New Hampshire	1,022	1,699	2,010	2,061	2,269	2,480	2,696	3,027
Rhode Island	851	1,638	1,923	2,046	2,172	2,316	2,654	2,967
Vermont	923	1,580	1,817	1,849	1,945	1,995	2,145	2,356
Middle Atlantic	943	1,704	2,082	2,272	2,480	2,743	3,169	3,925
New Jersey	725	1,865	2,458	2,726	3,154	3,757	4,767	6,157
New York	836	1,366	1,702	1,843	1,971	2,116	2,328	2,817
Pennsylvania	1,236	2,109	2,402	2,628	2,806	3,003	3,334	3,979
East North Central	1,097	1,866	2,146	2,225	2,377	2,550	2,786	3,135
Illinois	1,202	2,126	2,476	2,614	2,806	3,017	3,282	3,645
Indiana	997	1,713	1,950	2,006	2,108	2,271	2,466	2,731
Michigan	1,193	1,881	2,124	2,178	2,292	2,451	2,626	2,925
Ohio	1,030	1,730	1,985	2,050	2,233	2,360	2,605	2,995
Wisconsin	933	1,690	1,994	2,081	2,201	2,424	2,744	3,154
West North Central	1,052	1,831	2,111	2,235	2,400	2,638	2,924	3,305
Iowa	902	1,573	1,821	1,831	1,953	2,124	2,346	2,663
Kansas	1,093	1,957	2,212	2,203	2,377	2,589	2,851	3,225
Minnesota	1,132	1,938	2,243	2,457	2,651	2,913	3,217	3,666
Missouri	1,108	1,922	2,218	2,381	2,551	2,783	3,074	3,385
Nebraska	1,043	1,850	2,167	2,386	2,600	3,007	3,418	4,031
North Dakota	937	1,509	1,776	1,898	2,024	2,180	2,376	2,663
South Dakota	915	1,518	1,760	1,806	1,919	2,167	2,424	2,870
South Atlantic	1,106	1,876	2,154	2,277	2,430	2,637	2,921	3,337
Delaware	1,191	1,831	1,889	1,926	1,948	1,971	2,147	2,384
District of Columbia	1,374	2,129	2,417	3,061	3,178	3,331	3,544	3,829
Florida	1,360	2,351	2,730	2,902	3,147	3,439	3,832	4,406
Georgia	1,081	1,744	2,020	2,144	2,323	2,527	2,763	3,101
Maryland	813	1,365	1,618	1,527	1,565	1,608	1,708	1,859
North Carolina	932	1,603	1,799	1,896	2,004	2,175	2,404	2,672
South Carolina	1,021	1,818	2,087	2,185	2,362	2,611	2,935	3,368
Virginia	1,022	1,732	2,010	2,115	2,257	2,432	2,674	3,082
West Virginia	1,009	1,472	1,654	1,620	1,681	1,821	1,978	2,193
East South Central	1,019	1,718	1,983	2,077	2,248	2,451	2,668	3,016
Alabama	1,176	2,054	2,402	2,499	2,677	2,914	3,204	3,612
Kentucky	967	1,630	1,901	1,972	2,093	2,269	2,448	2,751
Mississippi	865	1,437	1,655	1,678	1,852	2,017	2,214	2,504
Tennessee	1,012	1,662	1,905	2,062	2,262	2,479	2,675	3,031
West South Central	1,138	1,937	2,234	2,344	2,520	2,767	3,094	3,539
Arkansas	923	1,511	1,744	1,776	1,974	2,194	2,468	2,773
Louisiana	1,180	1,926	2,179	2,275	2,451	2,724	3,019	3,369
Oklahoma	997	1,620	1,892	1,988	2,146	2,335	2,559	2,841
Texas	1,212	2,118	2,450	2,573	2,749	3,008	3,366	3,890
Mountain	1,350	2,321	2,743	2,878	3,016	3,279	3,639	4,090
Arizona	1,442	2,617	3,164	3,382	3,537	3,885	4,237	4,663
Colorado	1,308	2,240	2,504	2,673	3,047	3,392	3,812	4,329
Idaho	1,140	1,951	2,303	2,201	2,328	2,471	2,725	2,997
Montana	1,036	1,742	1,907	1,947	2,046	2,233	2,501	2,756
Nevada	2,031	3,253	3,858	4,017	3,973	4,320	4,773	5,418
New Mexico	1,140	1,913	2,302	2,254	2,410	2,533	2,814	3,149
Utah	1,283	2,069	2,433	2,556	2,721	2,871	3,111	3,375
Wyoming	1,094	1,985	2,269	2,122	2,257	2,373	2,621	2,911

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1990–2002 (in dollars)—Continued

Census division and state or area ^a	1990	1995	1997	1998	1999	2000	2001	2002 ^b
Pacific	1,651	2,877	3,339	3,574	3,818	4,228	4,759	5,648
Alaska	1,470	2,385	2,695	2,701	2,817	3,144	3,390	3,757
California	1,794	3,156	3,679	3,931	4,228	4,701	5,324	6,363
Hawaii	1,224	2,319	2,599	2,803	2,941	2,991	3,138	3,440
Oregon	1,275	1,987	2,290	2,358	2,481	2,717	2,980	3,245
Washington	1,162	1,924	2,146	2,237	2,448	2,708	3,008	3,455
Outlying areas	510	739	842	832	894	947	990	1,055
Puerto Rico	505	736	837	831	893	946	988	1,050
Virgin Islands	746	843	1,068	870	922	1,007	1,112	1,372

a. Geographic distribution reflects the beneficiaries' area of residence.

b. Preliminary data.

c. Excludes claims for persons residing in foreign countries.

d. Includes claims for persons whose place of residence is unknown.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data from 1990–2002 are based on bills incurred in each year and recorded before June 27, 2003. Includes data for services rendered to both aged and disabled persons.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2002 (in dollars)

Census division and state or area ^a	1975	1980	1990	1995	1999	2000	2001	2002 ^b
Total								
All areas ^c	43	70	193	402	424	413	463	476
United States ^d	43	70	193	402	424	413	463	476
New England	50	77	172	347	395	391	440	461
Connecticut	35	51	165	314	364	362	400	429
Maine	52	100	274	308	361	387	416	441
Massachusetts	63	98	181	380	437	425	484	495
New Hampshire	41	86	218	412	386	392	439	472
Rhode Island	43	59	129	265	341	343	379	406
Vermont	38	62	155	266	330	330	362	393
Middle Atlantic	50	73	168	308	378	378	440	468
New Jersey	45	81	164	344	393	392	457	505
New York	61	80	168	240	325	337	378	404
Pennsylvania	40	65	170	373	443	430	505	522
East North Central	40	68	167	358	413	405	457	465
Illinois	37	77	215	421	493	493	526	533
Indiana	35	60	180	399	414	393	449	444
Michigan	45	60	130	270	357	357	398	405
Ohio	41	69	157	375	422	410	465	476
Wisconsin	35	64	149	315	320	319	359	373
West North Central	45	82	194	367	421	414	463	484
Iowa	46	84	269	406	443	440	503	539
Kansas	39	66	255	461	504	492	509	508
Minnesota	46	94	125	245	273	279	314	364
Missouri	47	95	263	465	547	531	572	563
Nebraska	41	71	205	338	413	426	479	504
North Dakota	43	49	118	221	330	343	393	414
South Dakota	33	61	160	270	286	285	352	380
South Atlantic	34	59	168	396	387	368	402	410
Delaware	31	50	132	328	327	317	352	380
District of Columbia	34	64	193	389	443	397	429	483
Florida	34	59	195	488	445	414	425	422
Georgia	34	71	146	346	344	320	359	385
Maryland	37	56	141	347	389	378	404	417
North Carolina	31	52	132	283	315	310	356	368
South Carolina	26	46	159	337	358	342	396	414
Virginia	42	68	168	331	350	347	386	399
West Virginia	36	64	171	364	417	400	465	466
East South Central	37	56	154	358	381	374	431	439
Alabama	33	38	143	353	346	335	381	400
Kentucky	36	58	151	352	381	381	440	431
Mississippi	45	105	160	377	425	409	509	522
Tennessee	41	70	162	358	390	383	425	435
West South Central	45	94	267	539	545	509	564	549
Arkansas	44	84	238	372	456	441	515	570
Louisiana	43	83	374	683	725	646	726	684
Oklahoma	60	145	312	563	537	538	597	588
Texas	43	78	238	542	527	485	532	512
Mountain	38	64	226	486	463	442	467	462
Arizona	41	71	236	549	532	493	496	450
Colorado	42	73	266	538	480	459	493	490
Idaho	27	46	152	381	373	355	410	419
Montana	30	44	123	291	354	351	378	406
Nevada	37	66	232	569	558	577	568	469
New Mexico	57	122	267	488	528	497	530	545
Utah	36	75	266	473	425	409	431	462
Wyoming	36	49	208	379	392	381	401	442

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2002 (in dollars)—Continued

Census division and state or area ^a	1975	1980	1990	1995	1999	2000	2001	2002 ^b
Pacific	45	81	269	576	550	542	583	614
Alaska	68	115	283	437	760	723	797	759
California	46	87	287	629	603	594	644	683
Hawaii	49	83	217	467	434	454	528	541
Oregon	40	63	207	421	376	372	374	388
Washington	34	62	196	412	379	381	405	420
Outlying areas								
Puerto Rico	51	97	202	261	344	383	353	354
Virgin Islands	43	104	171	370	315	420	476	767

a. Geographic distribution reflects the beneficiaries' area of residence.

b. Preliminary data.

c. Excludes claims for persons residing in foreign countries.

d. Includes claims for persons whose place of residence is unknown.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for 1975 and 1980 are based on bills approved in each year and recorded in the Centers for Medicare & Medicaid Services before December 29, 1995. Data from 1990–2002 are based on bills incurred in each year and recorded before June 27, 2003. Includes data for services rendered to both aged and disabled persons.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.1—Hospital Insurance: Short-stay hospital discharges, by state or other area, selected fiscal years 1990–2002

State or area	1990	1994	1995	1996	1997	1998	1999	2000	2001	2002
All areas	10,472,587	11,503,279	11,680,874	11,749,394	11,952,088	11,912,079	11,659,885	11,778,705	12,192,174	12,499,749
Alabama	226,359	252,428	255,013	258,908	265,029	266,603	266,541	274,518	282,999	291,991
Alaska	6,491	7,954	8,635	9,593	9,917	10,633	11,031	11,684	11,748	11,794
Arizona	140,069	134,786	139,564	146,446	150,597	150,190	128,363	135,143	144,989	156,302
Arkansas	143,363	152,452	152,516	154,626	157,920	160,379	160,880	164,310	166,445	170,102
California	834,829	879,227	875,926	889,323	901,018	921,068	780,295	740,564	756,629	801,758
Colorado	98,262	104,733	105,216	102,450	103,735	97,479	100,648	101,486	101,258	107,180
Connecticut	114,938	138,988	141,765	141,031	143,071	133,672	125,115	124,951	135,169	148,864
Delaware	26,125	30,322	30,336	30,051	30,632	30,738	33,287	34,049	36,386	36,541
District of Columbia	36,062	39,306	39,526	38,661	38,508	38,661	38,693	39,112	40,138	39,389
Florida	579,368	734,297	742,862	739,066	743,556	758,714	736,958	765,130	823,957	869,777
Georgia	274,957	312,133	316,301	323,093	327,839	320,774	311,998	324,286	334,599	338,687
Hawaii	26,340	31,077	32,526	32,939	34,795	33,331	26,347	26,146	26,343	26,932
Idaho	31,559	35,923	36,327	39,236	41,066	42,451	43,353	44,027	43,272	40,996
Illinois	460,926	531,390	533,238	524,936	538,476	531,184	539,314	556,122	578,327	601,373
Indiana	254,404	278,602	276,601	278,303	287,615	289,743	289,693	297,851	306,202	304,034
Iowa	141,191	146,352	146,448	148,724	151,815	154,152	155,497	159,451	162,466	156,854
Kansas	117,017	121,106	120,593	122,917	125,481	127,045	126,920	128,024	129,973	129,334
Kentucky	199,042	219,042	222,162	224,322	231,081	231,352	237,553	243,886	252,454	257,205
Louisiana	213,819	228,770	234,663	235,574	237,390	232,942	223,794	237,154	243,724	248,183
Maine	54,963	62,904	63,013	64,361	66,278	67,895	68,128	69,030	68,547	66,705
Maryland	179,835	206,778	214,989	211,265	204,988	195,489	199,012	208,038	234,162	244,595
Massachusetts	286,332	314,727	310,455	299,734	293,217	280,333	268,179	263,152	271,657	275,984
Michigan	366,349	416,096	435,455	443,753	457,401	456,972	452,461	452,367	468,675	497,195
Minnesota	170,808	175,255	178,018	181,315	187,164	192,488	194,935	200,918	209,469	210,382
Mississippi	142,662	157,119	162,934	170,698	181,599	185,149	181,575	183,952	185,626	182,535
Missouri	281,059	292,107	298,509	298,805	299,996	297,554	293,724	300,576	315,642	317,278
Montana	40,505	40,361	40,770	40,831	41,542	41,854	42,343	44,208	45,697	42,880
Nebraska	69,299	68,982	70,113	72,975	75,630	77,188	76,841	76,960	74,217	71,921
Nevada	37,478	37,397	49,254	52,175	54,509	55,150	48,369	49,613	51,836	56,622
New Hampshire	39,103	41,737	42,746	43,834	44,758	42,918	42,054	45,712	48,206	46,282
New Jersey	338,509	377,524	385,145	375,353	371,173	364,034	373,224	372,063	374,250	389,938
New Mexico	50,391	47,576	50,334	49,758	53,329	52,913	51,459	51,085	51,396	51,469
New York	723,060	779,941	797,453	796,965	798,611	787,116	777,269	750,793	761,352	771,835
North Carolina	267,370	312,494	336,173	353,297	369,667	385,533	395,004	406,700	413,429	418,725
North Dakota	37,543	37,344	37,014	36,807	38,272	38,332	38,847	39,672	38,764	34,707
Ohio	527,006	557,927	562,234	565,237	562,603	541,958	533,499	536,335	550,989	559,223
Oklahoma	155,100	154,360	156,239	158,966	163,842	166,068	170,592	176,021	179,543	182,998
Oregon	106,164	106,454	105,878	106,901	111,656	111,028	100,569	91,806	98,854	102,568
Pennsylvania	685,403	768,866	766,535	731,542	728,572	692,290	664,002	634,802	649,458	656,105
Rhode Island	46,578	49,186	49,740	50,739	50,498	46,484	39,625	38,489	39,658	40,229
South Carolina	112,232	148,028	156,060	163,200	171,889	184,188	194,344	204,038	213,513	216,412
South Dakota	38,175	41,963	41,714	42,916	44,101	44,350	44,846	45,239	45,202	43,134
Tennessee	290,371	304,007	310,335	318,600	324,380	324,831	318,793	327,423	341,212	344,524
Texas	603,621	650,174	671,734	689,627	721,006	732,255	725,166	742,628	798,667	843,945
Utah	39,963	42,199	43,819	45,418	44,513	45,698	48,898	53,003	55,207	56,244
Vermont	20,251	22,239	22,815	23,001	23,456	22,585	23,133	24,014	24,778	22,658
Virginia	240,165	267,259	271,620	274,285	285,721	286,752	289,195	295,790	305,346	310,602
Washington	157,942	163,092	157,146	160,146	158,264	152,867	148,620	153,660	162,197	166,846
West Virginia	111,305	122,868	124,293	125,954	131,334	131,473	134,483	134,585	135,458	132,356
Wisconsin	217,727	225,486	227,774	226,898	232,721	233,103	233,432	238,572	240,711	243,774
Wyoming	15,255	15,505	16,009	15,912	16,557	17,256	17,429	18,764	18,932	18,044
Outlying areas										
Puerto Rico	93,436	104,129	111,950	115,410	120,547	123,752	130,209	137,315	138,713	139,682
Virgin Islands	528	1,156	1,374	1,234	1,402	1,569	1,511	1,552	1,468	1,571
Unknown	978	1,151	1,012	1,283	1,351	1,543	1,835	1,936	2,265	2,485

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Discharge data for fiscal year 2002 are final as of June 2003.

CONTACT: medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1994–2002 (in thousands)

Year ^a	All services ^b	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services ^c	All other services
		Total	Surgical ^d	Medical ^d				
Persons aged 65 or older								
<i>Number of bills</i>								
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	^e 486,296	429,299	45,496	383,803	51,498	^e	5,499	^e
2000	f	f	f	f	f	f	f	f
2001	f	f	f	f	f	f	f	f
2002	f	f	f	f	f	f	f	f
<i>Allowed charges ^g (dollars)</i>								
1994	76,875,482	37,701,474	12,860,574	24,840,900	28,538,228	1,848,456	220,822	8,566,502
1995	84,328,704	39,754,448	13,734,400	26,020,048	31,785,119	1,802,713	288,772	10,697,652
1996	88,174,598	39,483,559	13,164,645	26,318,914	34,958,448	1,634,475	319,929	11,778,187
1997	92,894,015	40,447,161	12,953,314	27,493,847	37,668,251	1,490,474	334,869	12,953,260
1998	101,819,407	41,696,171	12,061,669	29,634,502	38,740,973	1,333,194	6,045,120	14,003,949
1999	105,589,310	43,717,804	12,080,067	31,637,737	40,227,089	1,264,394	6,872,349	13,507,674
2000	114,337,594	48,261,747	12,358,986	35,902,761	44,189,797	1,583,229	5,543,211	14,759,610
2001	129,980,430	54,014,704	13,091,543	40,923,161	52,761,260	1,857,662	4,136,025	17,210,779
2002	149,930,352	57,749,310	f	f	66,207,087	2,064,971	4,199,501	19,709,483
<i>Amount reimbursed ^h (dollars)</i>								
1994	45,850,387	29,552,074	10,141,120	19,410,954	9,222,121	1,796,306	158,492	5,121,394
1995	49,728,171	31,117,478	10,833,812	20,283,666	10,090,501	1,751,376	206,777	6,562,039
1996	50,800,071	30,914,594	10,381,197	20,533,397	10,732,262	1,583,843	228,437	7,340,935
1997	52,435,319	31,683,366	10,218,613	21,464,753	11,207,888	1,440,441	234,163	7,869,461
1998	56,693,998	32,661,901	9,517,777	23,144,124	10,685,161	1,278,717	4,257,967	7,810,252
1999	58,192,937	34,381,359	9,523,625	24,857,734	10,361,754	1,209,255	4,835,797	7,404,772
2000	62,241,066	37,909,401	9,743,222	28,166,179	10,670,262	1,502,707	4,171,347	7,987,349
2001	70,385,889	42,472,068	10,351,499	32,120,569	12,919,556	1,757,857	4,021,665	9,214,743
2002	76,141,592	45,424,055	f	f	14,452,834	1,950,224	4,162,533	10,151,946
Disabled beneficiaries								
<i>Number of bills</i>								
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	^e 72,288	59,281	5,042	54,239	12,413	^e	594	^e
2000	f	f	f	f	f	f	f	f
2001	f	f	f	f	f	f	f	f
2002	f	f	f	f	f	f	f	f
<i>Allowed charges ^g (dollars)</i>								
1994	12,561,816	4,659,625	1,231,332	3,428,293	6,543,340	247,559	63	1,111,150
1995	14,392,687	5,005,244	1,392,181	3,612,063	7,691,605	280,673	79	1,414,965
1996	15,902,091	5,168,502	1,401,285	3,767,217	8,682,045	284,031	194	1,767,319
1997	17,061,775	5,399,169	1,409,583	3,989,586	9,394,475	281,459	575	1,986,097
1998	18,737,289	5,822,296	1,401,045	4,421,251	9,549,910	252,465	720,689	2,391,848
1999	20,003,515	6,266,038	1,453,807	5,582,913	10,121,499	245,492	866,332	2,504,154
2000	22,047,473	7,109,711	1,526,798	5,582,913	11,110,741	294,630	727,045	2,805,346
2001	25,468,692	8,015,022	1,631,945	6,383,077	13,252,005	342,157	552,115	3,307,393
2002	31,619,114	8,926,451	f	f	17,917,360	388,208	575,152	3,811,943

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1994–2002 (in thousands)—Continued

Year ^a	All services ^b	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services ^c	All other services
		Total	Surgical ^d	Medical ^d				
<i>Amount reimbursed ^h (dollars)</i>								
1994	7,458,953	3,547,187	959,659	2,587,528	2,887,030	242,791	46	781,899
1995	8,408,282	3,791,215	1,088,310	2,702,905	3,331,655	275,955	52	1,009,405
1996	9,099,676	3,908,937	1,095,977	2,812,960	3,652,723	278,816	142	1,259,058
1997	9,592,425	4,093,502	1,103,074	2,990,428	3,839,608	276,057	454	1,382,804
1998	10,440,004	4,405,354	1,095,140	3,310,214	3,777,451	246,335	496,832	1,514,032
1999	10,973,643	4,756,445	1,135,375	3,621,070	3,839,608	239,162	594,438	1,544,304
2000	11,907,520	5,396,707	1,192,908	4,203,799	4,003,490	286,553	527,188	1,693,582
2001	13,592,627	6,101,360	1,278,008	4,823,352	4,711,742	332,261	484,440	1,962,824
2002	15,152,250	6,805,803	f	f	5,255,021	376,979	515,790	2,198,657

a. Period for which the claim was incurred.

b. Included in total, but not shown separately, are some bills and charges for which type of service is unknown.

c. Due to Balanced Budget Act provisions, beginning in 1998 Part A now has a 100-visit limit and additional home health services will be billed under Part B.

d. Where both medical and surgical charges are included on a single bill, the highest-priced service is the determining factor in classifying the bill.

e. Data not available due to programmatic problems. Total for all services excluded independent laboratory services and all other services.

f. Data are no longer available.

g. Includes physician or supplier allowed charges as determined by the carrier and amounts actually billed by providers for outpatient hospital and home health services.

h. Amount reimbursed to or on behalf of the beneficiary—generally 80 percent of the allowed charges, once the beneficiary has satisfied the deductible in the current year. Some radiology and pathology services are reimbursed at a 100 percent rate, regardless of the beneficiary's deductible status.

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Includes only bills for which reimbursements were made by carriers or intermediaries and recorded in Centers for Medicare & Medicaid Services records before March 28, 2003.

. . . = less than 1,000.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B10—Supplementary Medical Insurance: Claims received by carriers and assignment rates, 1969–2002

Year	Total number of claims (thousands)	Net assignment rate ^a (percent)
1969	37,542	61.5
1970	42,148	60.8
1971	46,572	58.5
1972	51,041	54.9
1973	57,007	52.7
1974	68,307	51.9
1975	79,980	51.8
1976	91,624	50.5
1977	105,339	50.5
1978	117,886	50.6
1979	132,098	51.3
1980	150,048	51.5
1981	167,154	52.3
1982	182,440	53.0
1983	204,122	53.9
1984	238,362	59.0
1985	279,559	68.5
1986	306,714	68.0
1987	346,551	73.1
1988	386,763	77.3
1989	421,305	79.7
1990	474,226	81.1
1991	517,123	83.1
1992	554,619	86.2
1993	583,863	90.1
1994	622,514	92.8
1995	647,855	94.7
1996	678,030	95.9
1997	688,891	96.7
1998	697,523	97.3
1999	703,227	97.6
2000	720,493	97.9
2001	766,758	98.1
2002	821,992	98.4

a. Represents the number of assigned claims as a percentage of claims received.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2002

Year	Claims approved		Charges before reduction	
	Number (thousands)	Percentage reduced	Amount (millions of dollars)	Percentage reduced
<i>Assigned claims</i>				
1971	25,919	44.5	1,571	11.1
1972	26,798	47.5	1,630	10.9
1973	28,376	55.6	1,751	11.9
1974	33,295	64.5	2,194	14.3
1975	39,218	70.8	2,716	17.8
1976	44,065	74.3	3,261	19.9
1977	50,260	72.8	3,936	19.4
1978	56,493	73.6	4,678	19.9
1979	64,051	77.0	5,746	21.2
1980	73,068	80.8	7,303	22.7
1981 ^a	80,127	82.8	8,868	24.0
1982	91,615	83.3	11,315	24.3
1983	103,139	81.0	13,657	23.6
1984	128,559	80.8	16,571	25.4
1985	176,956	81.7	22,008	27.4
1986	191,139	82.8	24,662	28.4
1987	234,488	83.4	31,179	28.0
1988	271,225	85.6	37,275	29.8
1989	304,649	86.9	44,567	31.0
1990	341,220	87.5	51,012	32.9
1991	384,168	87.4	60,057	36.2
1992	412,924	86.2	67,667	39.7
1993	460,761	88.8	76,186	42.8
1994	508,981	87.7	85,170	42.5
1995	539,630	86.4	93,300	42.3
1996	550,587	87.1	97,744	44.9
1997	566,591	87.4	103,389	45.9
1998	575,799	87.9	106,947	46.9
1999	590,463	88.9	114,981	47.8
2000	615,862	87.9	126,391	47.7
2001	665,196	87.5	145,641	48.0
2002	722,826	87.7	152,373	56.3
<i>Unassigned claims</i>				
1971	17,955	57.6	1,348	12.5
1972	21,286	59.3	1,608	12.0
1973	24,691	66.4	1,886	12.6
1974	30,492	72.7	2,401	14.7
1975	36,182	77.4	2,973	17.7
1976	42,100	78.9	3,591	19.8
1977	48,619	77.1	4,233	19.0
1978	53,700	77.5	4,749	19.2
1979	59,961	80.9	5,596	20.7
1980	68,113	84.3	6,836	22.5
1981 ^a	72,765	85.8	7,870	23.8
1982	80,253	85.4	9,545	23.9
1983	87,436	82.7	10,885	22.9
1984	88,594	83.7	11,216	24.2
1985	77,965	84.6	10,059	25.9
1986	87,121	85.0	10,757	26.9
1987	83,116	82.4	10,258	24.7
1988	76,503	86.4	9,005	25.0
1989	74,947	90.1	8,971	25.0
1990	77,746	90.4	8,789	25.3
1991	77,520	91.3	7,884	23.1
1992	66,403	82.9	6,215	18.5
1993	51,080	86.5	4,267	16.5
1994	39,364	86.4	3,255	16.3
1995	29,975	83.4	2,543	15.4
1996	22,819	84.4	1,952	15.8
1997	18,615	84.4	1,650	16.4
1998	15,172	82.3	1,382	17.1
1999	13,834	81.3	1,316	17.7
2000	12,755	78.6	1,287	18.1
2001	12,085	76.7	1,252	18.2
2002	11,352	79.8	1,107	17.2

a. Excludes Texas Blue-Shield plan for July–December 1981.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B12—Supplementary Medical Insurance: State buy-ins, by state or other area, selected years 1991–2003

State or area	1991	1995	1996	1997	1998	1999	2000	2001	2002	2003
All areas	3,640,121	4,705,625	4,914,789	5,008,860	5,109,228	5,273,573	5,425,048	5,615,326	5,810,613	6,145,589
Alabama	97,601	116,916	120,399	122,720	121,990	128,875	136,860	141,436	144,603	162,912
Alaska	4,539	6,193	6,659	6,835	7,093	7,799	8,486	8,832	9,324	10,008
Arizona	28,650	44,236	47,393	49,213	51,141	53,450	57,712	61,989	74,678	91,782
Arkansas	64,996	77,660	79,549	79,176	78,514	79,508	79,606	80,231	82,040	86,597
California	646,108	747,814	768,907	769,335	776,832	793,510	818,846	848,361	892,260	950,503
Colorado	36,470	46,660	49,561	50,749	52,175	53,964	55,325	56,934	57,987	59,114
Connecticut	23,535	48,047	50,226	50,668	51,335	52,134	53,141	55,933	60,083	65,223
Delaware	4,499	6,645	7,735	8,446	8,900	8,231	10,737	12,094	13,252	15,224
District of Columbia	12,791	14,152	14,195	14,482	14,582	13,181	14,233	14,621	15,065	15,079
Florida	196,992	271,430	290,838	304,791	313,744	324,172	342,109	358,642	369,092	389,599
Georgia	128,976	160,380	165,210	168,267	171,047	171,638	176,596	181,312	186,466	193,807
Hawaii	11,529	16,695	17,905	18,751	19,226	19,962	20,326	21,090	21,748	22,904
Idaho	9,127	12,931	13,835	14,296	14,909	15,868	17,081	18,550	19,725	21,255
Illinois	94,434	137,571	144,330	144,684	145,976	149,850	155,743	161,141	163,368	175,822
Indiana	60,297	76,460	75,930	76,846	81,184	82,901	87,543	91,311	95,553	102,654
Iowa	41,170	48,517	50,031	49,344	49,844	50,954	51,976	52,891	54,536	56,920
Kansas	26,960	34,708	37,064	37,486	39,008	40,365	41,217	42,126	43,123	44,602
Kentucky	76,456	97,978	103,705	105,188	106,537	111,789	117,697	118,641	122,096	126,690
Louisiana	87,570	112,090	114,917	114,482	115,031	116,602	117,179	117,867	120,478	127,340
Maine	22,176	29,453	31,063	32,168	33,006	35,211	36,946	38,161	39,575	42,269
Maryland	48,028	58,865	59,882	59,745	61,669	64,086	65,372	68,010	70,224	73,994
Massachusetts	89,163	125,859	132,575	132,874	138,796	143,779	152,587	160,198	164,510	167,681
Michigan	91,340	123,948	131,263	130,682	135,769	139,411	145,172	148,760	152,758	158,998
Minnesota	39,366	52,192	55,989	56,486	57,559	59,926	63,607	66,874	70,873	75,080
Mississippi	90,530	108,577	104,036	106,461	106,336	107,176	107,495	116,503	125,832	131,706
Missouri	55,116	72,659	76,883	79,847	81,841	85,329	88,343	91,244	93,512	99,127
Montana	10,058	11,031	11,638	11,825	11,882	12,274	12,828	13,120	13,359	13,889
Nebraska	11,358	16,146	16,986	17,321	18,029	19,064	20,520	21,121	22,120	22,922
Nevada	8,657	14,227	15,711	16,435	17,191	18,322	19,155	20,709	22,207	24,587
New Hampshire	3,807	5,405	5,878	6,119	6,295	6,875	7,434	8,866	9,231	10,120
New Jersey	95,795	122,923	131,292	135,109	137,598	143,024	146,705	149,303	151,644	155,377
New Mexico	22,246	29,855	32,346	33,472	34,411	36,023	37,330	39,275	41,263	44,534
New York	255,952	325,882	342,539	352,129	363,331	372,824	369,479	395,830	409,388	432,681
North Carolina	117,656	186,328	197,039	204,551	210,388	216,563	223,402	228,997	233,229	240,422
North Dakota	4,639	5,560	5,751	5,684	5,612	5,758	5,908	6,275	6,317	6,541
Ohio	112,598	164,044	172,316	178,365	180,172	181,407	171,139	176,602	182,821	191,295
Oklahoma	51,457	60,080	61,723	62,965	63,142	66,115	67,413	67,787	68,905	70,761
Oregon	28,537	43,642	47,600	49,553	51,392	55,896	59,169	62,910	66,255	68,421
Pennsylvania	127,519	162,788	170,790	173,142	179,295	198,492	206,468	215,351	218,691	229,814
Rhode Island	10,585	15,517	16,780	17,321	17,729	18,513	19,787	21,620	22,928	25,146
South Carolina	78,701	95,970	98,817	101,455	104,111	110,032	112,232	116,288	118,635	117,997
South Dakota	9,399	12,346	12,661	12,778	12,791	13,112	13,146	13,237	13,542	14,231
Tennessee	116,861	148,391	157,602	164,010	171,653	178,707	182,342	184,570	187,438	203,567
Texas	234,169	314,991	327,827	336,801	339,648	350,959	360,191	370,598	380,954	410,248
Utah	10,263	13,506	14,387	14,589	14,900	15,569	16,231	16,712	17,497	18,548
Vermont	8,223	12,428	12,863	13,048	13,197	13,598	13,754	14,296	14,650	15,016
Virginia	77,898	102,964	107,457	108,365	108,427	111,404	113,259	113,898	116,496	120,711
Washington	54,774	71,531	76,885	83,128	89,419	91,976	97,390	94,852	99,552	105,516
West Virginia	28,086	39,720	42,377	43,572	43,019	45,406	46,305	47,774	47,547	50,008
Wisconsin	67,516	75,247	78,661	76,109	74,429	74,681	74,101	73,875	75,179	78,124
Wyoming	3,505	5,265	5,548	5,781	5,963	6,183	6,444	6,746	7,087	7,422
Outlying areas										
Guam	443	669	710	682	650	583	417	385	339	339
Northern Mariana Islands	273	314	318	322	311	335	342	367	372	358
Virgin Islands	727	219	205	207	199	207	204	210	206	194

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data are as of July except for 1995 data, which are as of June.

CONTACT: medicarestats@cms.hhs.gov.

Table 8.C1—Hospital Insurance and/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2002, selected years

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/ independent laboratories
	All hospitals	General ^a	Psychiatric			
<i>Facilities</i>						
1967	6,829	6,501	328	4,405	1,890	2,355
1970	6,779	6,444	335	4,494	2,333	2,750
1975	6,770	6,383	387	3,932	2,290	3,174
1976	6,774	6,368	406	3,992	2,353	3,156
1977	6,755	6,353	402	4,461	2,496	3,249
1978	6,848	6,432	416	4,982	2,715	3,384
1979	6,780	6,372	408	5,055	2,858	3,448
1980	6,736	6,325	411	5,155	3,012	3,374
1981	6,749	6,335	414	5,295	3,169	3,511
1982	6,737	6,321	416	5,510	3,627	3,643
1983	6,687	6,257	430	5,760	4,235	3,708
1984	6,676	6,228	448	6,183	5,237	3,890
1985	6,710	6,209	501	6,725	5,932	4,029
1986	6,731	6,189	542	7,148	5,953	4,298
1987	6,715	6,130	585	7,379	5,769	4,487
1988	6,658	6,044	614	7,683	5,673	4,676
1989	6,547	5,891	656	8,688	5,661	4,828
1990	6,522	5,848	674	9,008	5,730	4,881
1991	6,471	5,759	712	10,061	5,963	4,898
1992	6,433	5,722	711	10,910	6,461	4,942
1993	6,473	5,738	735	11,472	7,000	^b 156,117
1994	6,414	5,705	709	12,584	7,827	^b 151,422
1995	6,376	5,694	682	13,452	8,447	^b 156,511
1996	6,273	5,627	646	14,177	9,850	^b 157,876
1997	6,293	5,639	654	14,860	10,807	^b 164,054
1998	6,116	5,514	602	15,032	9,330	^b 166,817
1999	5,985	5,415	570	14,913	7,857	^b 171,018
2000	6,031	5,512	519	14,841	7,099	^b 168,333
2001	6,002	5,508	494	14,755	6,813	^b 173,807
2002	6,024	5,537	487	14,838	6,928	^b 176,947

(Continued)

8.C Medicare: Participating Facilities

Table 8.C1—Hospital Insurance and/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2002, selected years—Continued

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/ independent laboratories
	All hospitals	General ^a	Psychiatric			
	Beds					
1967	1,141,155	837,211	303,944	308,843	...	...
1970	1,190,309	878,509	311,800	325,415	...	...
1975	1,136,908	939,717	197,191	287,468	...	...
1976	1,169,433	980,805	188,628	332,515	...	...
1977	1,130,519	976,465	154,054	381,715	...	...
1978	1,154,250	1,015,645	138,605	414,188	...	...
1979	1,152,088	1,016,525	135,563	433,715	...	...
1980	1,145,245	1,017,794	127,451	448,007	...	...
1981	1,152,877	1,032,042	120,835	463,715	...	...
1982	1,146,480	1,044,427	102,053	497,056	...	...
1983	1,143,544	1,046,674	96,870	519,551	...	...
1984	1,146,093	1,050,832	95,261	548,201	...	...
1985	1,144,589	1,046,889	97,700	...	...	...
1986	1,137,853	1,043,430	94,423	444,326	...	...
1987	1,124,928	1,030,556	94,372	449,867	...	...
1988	1,115,809	1,022,116	93,693	476,447	...	...
1989	1,106,295	1,008,845	97,450	507,475	...	...
1990	1,104,703	1,005,480	99,223	512,107	...	...
1991	1,102,286	1,003,147	99,139	583,116	...	...
1992	1,093,895	997,695	96,200	606,218	...	...
1993	1,094,422	994,847	99,575	622,534	...	...
1994	1,074,371	985,809	88,562	649,054	...	...
1995	1,056,454	970,143	86,311	657,225	...	...
1996	1,038,105	955,604	82,501	671,839	...	...
1997	1,037,356	954,372	82,984	684,977	...	...
1998	1,012,168	934,635	77,533	722,626	...	...
1999	993,901	920,326	73,575	836,720	...	...
2000	982,616	913,806	68,810	939,364	...	...
2001	968,761	901,688	67,073	1,104,978	...	...
2002	957,898	897,076	60,822	1,260,625	...	...

a. Includes short-stay and other long-stay hospitals.

b. Beginning in 1993, the data include all Clinical Laboratory Improvement Act facilities as of December of each year.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable.

CONTACT: Medicarestats@cms.hhs.gov.

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2002 (in thousands)

Census division and state or area	All hospitals		Short-stay			Long-stay	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^a	Hospitals	Beds
Total							
All areas	6,024	957,898	4,231	834,643	20.8	1,793	123,255
United States	5,960	946,765	4,173	824,658	21.1	1,787	122,107
New England	266	43,647	177	32,724	15.3	89	10,923
Connecticut	46	1,0372	32	8,295	16.0	14	2,077
Maine	42	4,154	30	3,580	16.1	12	574
Massachusetts	117	19,909	71	13,358	13.9	46	6,551
New Hampshire	30	3,366	22	2,800	16.0	8	566
Rhode Island	15	3,785	11	2,910	17.1	4	875
Vermont	16	2,061	11	1,781	19.6	5	280
Middle Atlantic	621	150,837	467	128,837	21.8	145	22,000
New Jersey	107	31,665	80	27,534	23.0	27	4,131
New York	257	76,427	207	66,452	25.3	50	9,975
Pennsylvania	248	42,745	180	34,851	16.6	68	7,894
East North Central	896	166,610	645	149,635	23.3	251	16,975
Illinois	216	47,671	167	44,204	27.2	49	3,467
Indiana	152	21,240	99	18,731	21.7	53	2,509
Michigan	175	30,809	131	27,232	19.1	44	3,577
Ohio	211	47,259	151	42,349	24.9	60	4,910
Wisconsin	142	19,631	97	17,119	21.6	45	2,512
West North Central	770	78,360	430	65,758	22.8	340	12,602
Iowa	121	11,994	72	10,536	22.0	49	1,458
Kansas	152	11,380	88	9,407	24.1	64	1,973
Minnesota	148	16,703	89	13,918	20.9	59	2,785
Missouri	138	24,661	101	22,345	25.7	37	2,316
Nebraska	95	7,054	27	4,561	17.9	68	2,493
North Dakota	50	3,244	17	2,331	22.7	33	913
South Dakota	66	3,324	36	2,660	22.1	30	664
South Atlantic	890	171,542	656	151,228	19.7	234	20,314
Delaware	11	2,321	5	1,892	16.3	6	429
District of Columbia	14	4,531	7	3,527	49.1	7	1,004
Florida	229	52,650	176	49,036	17.1	53	3,614
Georgia	176	25,291	122	21,797	23.1	54	3,494
Maryland	67	16,563	48	13,255	20.1	19	3,308
North Carolina	134	26,079	108	22,853	19.4	26	3,226
South Carolina	76	12,580	61	11,345	19.3	15	1,235
Virginia	117	21,995	86	19,047	20.7	31	2,948
West Virginia	66	9,532	43	8,476	24.7	23	1,056
East South Central	491	74,985	388	68,529	26.2	103	6,456
Alabama	121	19,917	102	18,448	26.3	19	1,469
Kentucky	116	17,340	82	15,047	23.8	34	2,293
Mississippi	106	12,905	90	12,289	28.7	16	616
Tennessee	148	24,823	114	22,745	26.7	34	2,078
West South Central	927	105,638	608	88,888	22.8	319	16,750
Arkansas	103	11,144	65	8,998	20.2	38	2,146
Louisiana	193	22,545	111	18,424	30.4	82	4,121
Oklahoma	146	14,807	100	13,045	25.4	46	1,762
Texas	485	57,142	332	48,421	20.8	153	8,721
Mountain	448	45,907	283	39,206	17.2	165	6,701
Arizona	83	12,131	61	11,075	15.8	22	1,056
Colorado	83	11,158	48	9,098	19.1	35	2,060
Idaho	45	2,874	21	2,354	13.6	24	520
Montana	65	2,938	31	2,351	16.8	34	587
Nevada	42	5,197	24	4,394	16.9	18	803
New Mexico	53	4,972	38	4,340	18.0	15	632
Utah	49	5,146	39	4,252	19.9	10	894
Wyoming	28	1,491	21	1,342	19.9	7	149

(Continued)

8.C Medicare: Participating Facilities

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2002 (in thousands)—Continued

Census division and state or area	All hospitals		Short-stay			Long-stay	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^a	Hospitals	Beds
Pacific	660	109,239	519	99,853	18.7	141	9,386
Alaska	24	1,526	17	1,285	28.2	7	241
California	447	82,989	371	77,227	19.9	76	5,762
Hawaii	27	2,738	17	2,271	13.3	10	467
Oregon	62	7,952	48	7,451	14.9	14	501
Washington	100	14,034	66	11,619	15.4	34	2,415
Outlying areas	64	11,133	58	9,985	11.0	6	1,148
Puerto Rico	59	10,448	53	9,300	16.6	6	1,148
Virgin Islands	2	320	2	320	28.5	0	0
Other	3	365	3	365	1.1	0	0

a. Based on total number of persons enrolled in the Hospital Insurance program as of July 1, 2002.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

Table 8.C3—Hospital Insurance and/or Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by census division and state or other area, December 2002

Census division and state or area	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End stage renal disease facilities
	Number	Beds	Beds per 1,000 enrollees ^a			
Total						
All areas	14,838	1,260,625	31.9	6,928	176,947	4,309
United States	14,829	1,260,265	32.3	6,879	175,905	4,265
New England	1,056	100,775	40.3	305	9,050	139
Connecticut	244	30,119	58.5	81	2,530	29
Maine	121	7,248	12.1	33	959	13
Massachusetts	483	46,705	48.7	121	3,551	68
New Hampshire	68	5,580	32.4	34	852	10
Rhode Island	97	7,896	46.6	23	736	13
Vermont	43	3,227	36.0	13	422	6
Middle Atlantic	1,770	232,965	39.5	560	22,091	566
New Jersey	359	43,803	36.8	53	4,994	103
New York	672	121,907	46.7	207	9,774	222
Pennsylvania	739	67,255	32.2	300	7,323	241
East North Central	2,839	224,269	35.2	1,107	29,032	626
Illinois	676	44,530	27.5	280	7,524	150
Indiana	498	36,640	42.8	160	4,367	91
Michigan	388	33,844	24.0	204	5,964	121
Ohio	916	72,997	43.2	341	8,342	174
Wisconsin	361	36,258	46.1	122	2,835	90
West North Central	1,809	127,253	44.4	838	13,397	325
Iowa	336	22,644	47.5	183	2,329	50
Kansas	256	15,234	39.1	130	2,136	41
Minnesota	404	37,202	56.5	228	2,251	68
Missouri	464	27,751	32.2	159	4,232	109
Nebraska	175	11,552	45.5	63	1,346	25
North Dakota	84	6,618	64.5	29	482	13
South Dakota	90	6,252	52.2	46	621	19
South Atlantic	2,265	192,175	25.5	1,005	35,845	964
Delaware	37	3,324	29.2	13	620	15
District of Columbia	20	2,017	28.0	12	439	25
Florida	695	63,331	22.4	369	11,850	250
Georgia	332	30,096	32.6	94	5,888	206
Maryland	233	20,360	31.3	54	3,236	110
North Carolina	413	35,062	30.4	167	5,276	126
South Carolina	176	13,593	23.6	72	2,908	85
Virginia	240	16,121	17.9	154	4,058	123
West Virginia	119	8,271	24.4	70	1,570	24
East South Central	983	73,062	28.4	451	11,660	343
Alabama	224	20,501	29.7	141	3,078	99
Kentucky	303	21,385	34.3	110	2,797	53
Mississippi	154	13,013	30.8	62	1,860	67
Tennessee	302	18,163	21.6	138	3,925	124
West South Central	1,672	132,203	34.5	1,484	21,829	576
Arkansas	191	13,517	30.7	176	1,766	62
Louisiana	266	26,486	44.2	233	3,515	129
Oklahoma	238	16,972	33.3	191	2,630	62
Texas	977	75,228	32.9	884	13,918	323
Mountain	738	54,568	24.6	461	9,709	240
Arizona	133	9,971	14.6	63	2,697	91
Colorado	200	15,331	32.7	124	2,247	42
Idaho	79	5,824	34.6	48	711	7
Montana	101	7,078	51.4	48	626	15
Nevada	42	4,840	19.4	37	953	21
New Mexico	71	3,090	13.2	62	1,084	31
Utah	79	5,705	27.3	41	1,055	24
Wyoming	33	2,729	41.2	38	336	9

(Continued)

8.C Medicare: Participating Facilities

Table 8.C3—Hospital Insurance and/or Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by census division and state or other area, December 2002—Continued

Census division and state or area	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End stage renal disease facilities
	Number	Beds	Beds per 1,000 enrollees ^a			
Pacific	1,697	122,995	23.4	668	23,292	486
Alaska	15	519	11.9	15	436	2
California	1,263	92,582	24.2	517	17,348	371
Hawaii	41	3,447	20.6	14	756	18
Oregon	122	8,290	16.9	61	1,998	43
Washington	256	18,157	24.6	61	2,754	52
Outlying areas	9	360	0.4	49	1,042	44
Puerto Rico	7	290	0.5	45	953	37
Virgin Islands	1	40	3.7	1	29	2
Other	1	30	0.1	3	60	5

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of July 1, 2002.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Medicarestats@cms.hhs.gov.

Table 8.E1—Unduplicated number of recipients, total vendor payments, and average payment, by type of medical service, selected fiscal years 1985–2000

Year	Total	Inpatient services in—		Intermediate-care facility services for—		Nursing facility ^a	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other
		General hospital	Mental hospital	Mentally retarded	All other											
<i>Number of recipients (thousands)</i>																
1985	21,814	3,434	60	147	828	547	14,387	4,672	3,357	10,072	2,121	6,354	535	13,921	1,636	5,371
1986	22,515	3,544	53	145	828	571	14,894	5,161	3,451	10,702	2,027	7,123	593	14,704	1,732	5,573
1987	23,109	3,767	57	149	849	572	15,373	5,131	3,542	10,979	2,183	7,596	609	15,083	1,652	5,957
1988	22,907	3,832	60	145	866	579	15,265	5,072	3,480	10,533	2,256	7,579	569	15,323	1,525	6,601
1989	23,511	4,170	90	148	888	564	15,686	4,214	3,555	11,344	2,391	7,759	609	15,916	1,564	7,278
1990	25,255	4,593	92	147	860	601	17,078	4,552	3,873	12,370	2,804	8,959	719	17,294	1,752	8,302
1991	28,280	5,072	65	146	^a	1,500	19,321	5,209	4,282	14,137	3,511	10,505	813	19,602	2,185	10,319
1992	30,926	5,768	77	151	^a	1,573	21,627	5,700	4,711	15,120	4,115	11,804	925	22,030	2,550	12,427
1993	33,432	5,894	75	149	^a	1,610	23,746	6,174	5,229	16,436	4,839	12,970	1,067	23,901	2,538	15,035
1994	35,053	5,866	85	159	^a	1,639	24,267	6,352	5,409	16,567	5,258	13,412	1,293	24,471	2,566	17,321
1995	36,282	5,561	84	151	^a	1,667	23,789	6,383	5,528	16,712	5,322	13,064	1,639	23,723	2,501	19,277
1996	36,118	5,362	93	140	^a	1,594	22,861	6,208	5,343	15,905	5,070	12,607	1,727	22,585	2,366	21,104
1997	34,873	4,746	87	136	^a	1,603	21,170	5,935	5,142	13,632	4,713	11,074	1,861	20,954	2,091	20,284
1998	40,649	4,273	135	126	^a	1,646	18,555	4,965	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
1999 ^b	40,184	4,497	87	122	^a	1,617	18,373	5,622	3,986	12,417	6,746	10,194	814	19,855	...	37,359
2000 ^b	42,763	4,933	99	118	^a	1,703	19,104	5,892	4,735	13,226	7,667	11,396	995	20,517	...	40,544
<i>Total payments (millions of dollars)</i>																
1985	37,508	9,453	1,192	4,731	6,516	5,071	2,346	458	251	1,789	714	337	1,120	2,315	195	1,020
1986	41,005	10,364	1,113	5,072	6,773	5,660	2,547	531	252	1,980	807	424	1,352	2,692	226	1,212
1987	45,050	11,302	1,409	5,591	7,280	5,967	2,776	541	263	2,226	963	475	1,690	2,988	228	1,349
1988	48,710	12,076	1,375	6,022	7,923	6,354	2,953	577	284	2,413	1,105	543	2,015	3,294	206	1,569
1989	54,500	13,378	1,470	6,649	8,871	6,660	3,408	498	317	2,837	1,249	590	2,572	3,689	227	2,085
1990	64,859	16,674	1,714	7,354	9,667	8,026	4,018	593	372	3,324	1,688	721	3,404	4,420	265	2,618
1991	77,048	19,891	2,010	7,680	^a	20,709	4,952	710	437	4,283	2,211	897	4,101	5,424	359	3,384
1992	90,814	23,503	2,196	8,550	^a	23,544	6,102	851	538	5,279	2,818	1,035	4,886	6,765	500	4,243
1993	101,709	25,734	2,161	8,831	^a	25,431	6,952	961	937	6,215	3,457	1,137	5,601	7,970	538	5,784
1994	108,270	26,180	2,057	8,347	^a	27,095	7,189	969	1,040	6,342	3,747	1,176	7,042	8,875	516	7,695
1995	120,141	26,331	2,511	10,383	^a	29,052	7,360	1,019	986	6,627	4,280	1,180	9,406	9,791	514	10,700
1996	121,685	25,176	2,040	9,555	^a	29,630	7,238	1,028	1,094	6,504	4,222	1,208	10,868	10,697	474	11,948
1997	124,429	23,143	2,009	9,798	^a	30,504	7,041	1,036	979	6,169	4,252	1,033	12,237	11,972	418	12,958
1998	142,318	21,499	2,801	9,482	^a	31,892	6,070	901	587	5,759	3,921	939	2,702	13,522	449	38,747
1999 ^b	153,479	22,231	1,758	9,332	^a	33,251	6,556	1,204	470	6,094	5,801	1,158	2,906	16,612	...	45,637
2000 ^b	168,307	24,266	1,768	9,375	^a	34,432	1,204	1,404	658	7,053	6,174	1,288	3,119	20,014	...	50,953
<i>Average payment (dollars)</i>																
1985	1,719	2,753	20,021	32,238	7,868	9,278	163	98	75	178	337	53	2,092	166	119	190
1986	1,821	2,924	20,952	35,089	8,182	9,910	171	103	73	185	398	60	2,278	183	130	217
1987	1,949	3,000	24,714	37,490	8,571	10,432	181	105	74	203	441	63	2,777	198	138	227
1988	2,126	3,151	22,956	41,413	9,153	10,971	193	114	82	229	490	72	3,542	215	135	238
1989	2,318	3,208	16,397	44,999	9,994	11,809	217	118	89	250	523	76	4,225	232	145	286
1990	2,568	3,630	18,548	50,048	11,236	13,356	235	130	96	269	602	80	4,733	256	151	315
1991	2,725	3,922	30,948	52,750	^a	13,811	256	136	102	303	630	85	5,048	277	164	328
1992	2,936	4,075	28,364	56,502	^a	14,965	282	149	114	349	685	88	5,283	307	196	342
1993	3,042	4,366	28,948	59,156	^a	15,798	293	156	179	378	714	88	5,250	333	212	385
1994	3,089	4,463	24,120	52,571	^a	16,533	296	153	192	383	713	88	5,445	363	201	444
1995	3,311	4,735	29,847	68,613	^a	17,424	309	160	178	397	804	90	5,740	413	206	555
1996	3,369	4,696	21,873	68,232	^a	18,589	317	166	205	409	833	96	6,293	474	200	566
1997	3,568	4,877	22,990	72,033	^a	19,029	333	275	190	453	902	93	6,575	571	200	639
1998	3,501	5,031	20,701	74,960	^a	19,379	327	182	135	474	742	100	2,206	699	223	1,113
1999 ^b	3,819	4,943	18,094	76,443	^a	20,568	357	214	118	491	860	285	3,571	837	...	1,221
2000 ^b	3,936	4,919	17,800	79,330	^a	20,220	356	238	139	533	805	274	3,135	975	...	1,257

a. Beginning in fiscal year 1991, "Nursing facility services" category combines "Intermediate care facility, All other" and "Skilled nursing facility services," which were previously separate. Data under "Nursing facility services" prior to 1991 reflect "Skilled nursing facility services."
 b. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

SOURCE: Data before 1998 HCFA-Form 2082 and data onward from 1999 Medicaid Statistical Information Systems, MSIS, Centers for Medicare & Medicaid Services.

NOTES: Fiscal year 1977 began in October 1976 and was the first year of the new federal cycle. Before 1977, the fiscal year began in July.

Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year. Beginning in 1998, several new medical services were combined with "Other" (excludes unknowns).

... = not applicable.

CONTACT: Tony Parker (410) 786-0155.

8.E Medicaid: Recipients

Table 8.E2—Unduplicated number of recipients, total vendor payments, and average payment, by type of eligibility category, selected fiscal years 1972–2000

Year	Total	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
Number of recipients (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
1999 ^a	40,184	3,774	...	6,697	18,837	7,511	3,365
2000 ^a	42,763	3,731	...	6,889	19,723	8,750	3,671
Total payments (millions of dollars)							
1972	6,300	1,925	45	1,354	1,139	962	875
1975	12,242	4,358	93	3,052	2,186	2,062	492
1980	23,311	8,739	124	7,497	3,123	3,231	596
1985	37,508	14,096	249	13,203	4,414	4,746	798
1986	41,005	15,097	277	14,635	5,135	4,880	980
1987	45,050	16,037	309	16,507	5,508	5,592	1,078
1988	48,710	17,135	344	18,250	5,848	5,883	1,198
1989	54,500	18,558	409	20,476	6,892	6,897	1,268
1990	64,859	21,508	434	23,969	9,100	8,590	1,257
1991	77,048	25,453	475	27,798	11,690	10,439	1,193
1992	90,814	29,078	530	33,326	14,491	12,185	1,204
1993	101,709	31,554	589	38,065	16,504	13,605	1,391
1994	108,270	33,618	644	41,654	17,302	13,585	1,467
1995	120,141	36,527	848	48,570	17,976	13,511	2,708
1996	121,685	36,947	869	51,196	17,544	12,275	2,853
1997	124,430	37,721	...	54,130	17,544	12,307	2,727
1998	142,318	40,602	...	60,375	22,806	14,833	3,702
1999 ^a	153,479	42,522	...	65,850	24,151	15,801	5,156
2000 ^a	168,307	44,503	...	72,742	26,775	17,763	6,525
Average payment (dollars)							
1972	358	580	417	833	145	307	555
1975	556	1,205	850	1,296	228	455	273
1980	1,079	2,540	1,358	2,659	335	663	398
1985	1,719	4,605	3,104	4,496	452	860	658
1986	1,821	4,808	3,401	4,721	512	864	719
1987	1,949	4,975	3,644	5,008	542	999	761
1988	2,126	5,425	4,005	5,366	583	1,069	891
1989	2,318	5,926	4,317	5,858	668	1,206	1,079
1990	2,568	6,717	5,212	6,595	811	1,429	1,138
1991	2,725	7,577	5,572	6,979	871	1,540	1,813
1992	2,936	7,770	6,298	7,612	959	1,752	1,813
1993	3,042	8,168	7,036	7,717	1,013	1,813	1,824
1994	3,089	8,331	7,412	7,755	1,006	1,791	1,884
1995	3,311	8,868	9,256	8,422	1,047	1,777	1,762
1996	3,369	8,622	9,143	8,357	1,048	1,722	1,635
1997	3,568	9,538	...	8,832	1,111	1,809	3,597
1998	3,501	10,242	...	9,095	1,203	1,876	1,166
1999 ^a	3,819	11,268	...	9,832	1,282	2,104	1,532
2000 ^a	3,936	11,929	...	10,559	1,358	2,030	1,778

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

SOURCE: 1999 Medicaid Statistical Information System, MSIS, earlier years HCFA-Form 2082, Centers for Medicare & Medicaid Services.

NOTES: Fiscal year 1977 began in October 1976 and was the first year of the new federal fiscal cycle. Before 1977, the fiscal year began in July.

Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year. Beginning in 1997, Disability data includes Blindness. Children includes Foster Care, and Other are Unknowns.

... = not applicable.

CONTACT: Tony Parker (410) 786-0155.

Table 8.H1a—Number of recipients, total payments, and average payment, by state, fiscal year 1999

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States ^a	40,184,407	153,479	3,819
Alabama	537,480	1,695	3,154
Alaska	83,992	398	4,736
Arizona	639,015	1,878	2,938
Arkansas	466,417	1,365	2,927
California	6,854,016	15,754	2,299
Colorado	359,237	1,641	4,568
Connecticut	414,578	2,671	6,442
Delaware	107,133	462	4,316
District of Columbia	133,495	759	5,684
Florida	2,355,638	6,440	2,734
Georgia	1,267,798	3,232	2,549
Hawaii	203,763	535	2,626
Idaho	120,052	520	4,334
Illinois	1,475,330	6,339	4,297
Indiana	625,693	2,750	4,394
Iowa	309,204	1,364	4,413
Kansas	269,453	1,096	4,067
Kentucky	718,979	2,598	3,614
Louisiana	720,360	2,534	3,518
Maine	180,668	1,206	6,674
Maryland	616,243	3,044	4,940
Massachusetts	1,025,649	4,953	4,829
Michigan	1,299,136	4,701	3,618
Minnesota	561,823	3,038	5,408
Mississippi	513,114	1,600	3,119
Missouri	797,578	2,798	3,508
Montana	96,677	365	3,776
Nebraska	215,489	876	4,065
Nevada	134,234	459	3,418
New Hampshire	93,169	527	5,657
New Jersey	839,391	4,386	5,225
New Mexico	360,321	1,123	3,118
New York	3,062,791	25,357	8,279
North Carolina	1,141,774	4,266	3,736
North Dakota	61,913	346	5,593
Ohio	1,277,200	6,329	4,956
Oklahoma	465,844	1,434	3,078
Oregon	524,548	1,596	3,043
Pennsylvania	1,554,374	6,133	3,946
Rhode Island	161,083	881	5,472
South Carolina	644,580	2,459	3,815
South Dakota	85,820	369	4,305
Tennessee	1,550,955	3,285	2,118
Texas	2,518,222	8,126	3,227
Utah	217,997	797	3,657
Vermont	129,551	421	3,248
Virginia	614,515	2,207	3,592
Washington	862,778	2,575	2,985
West Virginia	342,885	1,344	3,920
Wisconsin	526,369	2,246	4,267
Wyoming	46,083	199	4,313

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Tony Parker (410) 786-0155.

8.H Medicaid: State Data

Table 8.H1b—Number of recipients, total payments, and average payment, by state, fiscal year 2000

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States ^a	42,763,233	168,307	3,936
Alabama	619,480	2,391	3,860
Alaska	96,432	470	4,876
Arizona	681,258	2,112	3,100
Arkansas	489,325	1,510	3,086
California	7,915,450	17,060	2,155
Colorado	380,964	1,809	4,747
Connecticut	419,890	2,839	6,762
Delaware	115,267	528	4,584
District of Columbia	138,677	793	5,715
Florida	2,360,417	7,350	3,114
Georgia	1,289,795	3,578	2,774
Hawaii	203,763	535	2,626
Idaho	131,077	594	4,530
Illinois	1,516,082	7,807	5,150
Indiana	704,624	2,976	4,224
Iowa	313,648	1,476	4,707
Kansas	262,557	1,226	4,670
Kentucky	770,536	2,913	3,780
Louisiana	761,248	2,631	3,456
Maine	191,624	1,307	6,820
Maryland	664,576	3,586	5,396
Massachusetts	1,047,440	5,397	5,153
Michigan	1,351,650	4,881	3,611
Minnesota	559,463	3,277	5,857
Mississippi	605,077	1,807	2,987
Missouri	890,318	3,270	3,673
Montana	103,821	433	4,173
Nebraska	229,038	958	4,185
Nevada	138,069	515	3,733
New Hampshire	96,935	651	6,712
New Jersey	822,369	4,707	5,724
New Mexico	375,585	1,249	3,325
New York	3,419,893	26,148	7,646
North Carolina	1,208,789	4,830	3,996
North Dakota	60,864	356	5,852
Ohio	1,304,886	7,090	5,434
Oklahoma	507,059	1,604	3,163
Oregon	542,392	1,700	3,135
Pennsylvania	1,492,352	6,366	4,266
Rhode Island	178,859	1,070	5,982
South Carolina	685,104	2,672	3,900
South Dakota	101,951	401	3,935
Tennessee	1,568,318	3,491	2,226
Texas	2,602,616	9,075	3,487
Utah	224,268	959	4,277
Vermont	138,862	479	3,451
Virginia	627,214	2,484	3,960
Washington	895,279	2,432	2,717
West Virginia	335,014	1,392	4,154
Wisconsin	526,369	2,246	4,267
Wyoming	46,422	214	4,609

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Tony Parker (410) 786-0155.

Table 9.A2—Summary data on state programs, by state or other area, 2002

State or area	Covered employment (excludes federal government)		Insured unemploy- ment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemploy- ment	Average actual duration (weeks)	Claimants exhausting benefits		Contribu- tions collected ^b (millions of dollars)	Benefits paid ^c (millions of dollars)	Average employer contri- bution rate ^d (percent)
	Average number of workers (thou- sands)	Total payroll ^e (millions of dollars)			Amount ^f (dollars)	Percent of average weekly wages ^g			Number	Percent of first pay- ments ^h			
Total	126,537	4,590,842	2.8	10,089,446	256.76	36.8	3,585,842	16.5	4,417,456	42.5	19,728.6	42,055.3	1.8
Alabama	1,780	54,348	2.3	145,445	167.44	28.5	41,330	13.1	47,535	31.1	185.4	308.8	1.4
Alaska	271	9,778	5.2	48,722	193.34	27.9	14,121	14.3	20,353	43.3	107.1	108.2	2.5
Arizona	2,192	73,885	2.0	124,941	176.21	27.2	44,678	17.2	54,006	42.2	135.4	384.6	0.8
Arkansas	1,099	30,467	3.3	104,865	223.04	41.9	36,578	14.3	42,145	38.3	167.3	306.4	1.9
California	14,595	601,444	3.7	1,401,507	217.24	27.4	534,683	18.0	670,842	47.8	2,580.6	6,041.6	2.5
Colorado	2,101	79,097	2.0	113,938	313.18	43.3	41,438	15.2	61,090	53.3	154.9	541.0	0.9
Connecticut	1,628	76,204	3.2	162,293	286.09	31.9	51,417	16.4	53,821	33.7	462.6	712.4	2.5
Delaware	397	15,696	2.2	32,334	228.08	30.0	8,634	15.1	9,045	28.3	52.0	118.3	1.6
District of Columbia	458	24,631	1.6	18,349	289.07	28.0	7,451	26.1	13,563	52.9	93.0	135.3	2.2
Florida	7,050	226,163	1.8	357,608	225.33	36.5	126,770	15.3	175,087	47.3	553.6	1,225.3	1.1
Georgia	3,722	131,549	2.0	260,128	238.73	35.1	73,305	12.9	119,533	44.7	127.5	780.2	0.5
Hawaii	528	16,689	2.3	29,626	297.23	48.9	12,101	19.2	12,201	29.6	104.9	160.6	1.2
Idaho	558	15,516	3.4	59,570	231.07	43.4	18,838	13.9	21,031	34.9	93.2	180.5	1.2
Illinois	5,680	224,335	3.3	466,345	280.06	36.9	187,079	19.0	207,721	43.3	1,047.9	2,446.5	2.3
Indiana	2,796	90,553	2.2	198,718	254.58	40.9	62,714	14.1	86,800	41.7	227.0	713.3	1.2
Iowa	1,393	41,028	2.3	111,411	254.72	45.0	31,350	13.4	32,038	27.4	211.0	362.6	1.2
Kansas	1,277	38,958	2.2	83,381	276.37	47.1	28,404	15.8	32,110	41.9	182.4	358.6	1.4
Kentucky	1,680	51,476	2.5	133,254	245.83	41.7	41,185	15.3	39,106	27.4	276.4	503.5	2.2
Louisiana	1,812	53,935	2.0	98,791	197.25	34.5	36,497	15.6	38,377	40.1	122.0	303.2	1.6
Maine	577	16,889	2.2	33,156	224.42	39.9	12,870	17.2	12,191	34.6	104.9	121.8	1.8
Maryland	2,299	87,455	2.1	130,496	240.94	32.9	48,321	16.1	47,272	35.8	245.7	499.9	1.3
Massachusetts	3,149	141,150	3.7	299,998	360.09	41.8	116,290	19.0	134,684	44.3	784.9	1,966.1	2.3
Michigan	4,339	164,799	3.5	471,730	276.49	37.9	150,816	14.8	180,235	34.9	944.4	1,882.4	2.7
Minnesota	2,551	95,182	2.4	170,607	317.61	44.3	61,646	16.9	68,451	39.0	333.5	860.9	0.9
Mississippi	1,078	28,248	2.6	76,970	168.49	33.4	27,848	15.3	29,437	37.0	109.6	193.0	1.6
Missouri	2,572	84,396	2.6	185,414	205.49	32.6	65,788	15.6	72,833	40.4	250.1	592.3	1.5
Montana	374	9,479	2.5	26,361	187.07	38.4	9,354	15.2	9,955	38.6	61.5	71.5	1.1
Nebraska	858	25,032	1.5	44,216	211.51	37.7	13,113	13.7	18,405	44.1	70.1	124.3	1.3
Nevada	1,029	34,745	3.1	85,757	232.13	35.8	31,470	16.5	39,522	39.8	221.0	343.0	1.3
New Hampshire	595	21,414	1.7	23,965	259.84	37.6	9,980	17.6	8,062	29.6	30.2	116.8	0.8
New Jersey	3,792	170,850	3.5	348,752	331.22	38.2	134,575	18.9	200,236	58.2	895.1	2,091.8	1.9
New Mexico	708	20,225	2.1	37,385	207.09	37.7	14,867	17.4	15,611	42.0	71.3	135.7	0.9
New York	8,136	374,836	3.1	618,022	275.47	31.1	251,006	19.0	382,783	57.9	2,057.9	3,340.5	3.6
North Carolina	3,691	119,805	2.9	372,683	258.98	41.5	108,644	13.2	135,370	34.6	412.7	1,096.4	0.9
North Dakota	302	7,894	1.5	16,251	219.27	43.6	4,584	12.0	5,536	33.4	41.8	47.3	1.3

(Continued)

9.A Unemployment Insurance

Table 9.A2—Summary data on state programs, by state or other area, 2002—Continued

State or area	Covered employment (excludes federal government)		Insured unemploy- ment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemploy- ment	Average actual duration (weeks)	Claimants exhausting benefits		Contribu- tions collected ^b (millions of dollars)	Benefits paid ^c (millions of dollars)	Average employer contri- bution rate ^d (percent)
	Average number of workers (thou- sands)	Total payroll ^e (millions of dollars)			Amount ^f (dollars)	Percent of average weekly wages ^g			Number	Percent of first pay- ments ^h			
Ohio	5,255	178,311	2.5	355,347	251.05	38.5	132,425	16.1	130,169	35.1	645.2	1,486.3	1.6
Oklahoma	1,393	38,980	1.8	71,149	233.87	43.5	25,418	15.7	29,202	42.3	96.0	253.1	0.8
Oregon	1,543	51,492	4.4	174,847	276.09	43.1	68,283	18.0	78,869	42.3	462.5	862.9	1.9
Pennsylvania	5,397	191,716	3.9	560,805	291.06	42.6	208,527	17.3	197,968	35.0	1,352.5	2,639.4	3.7
Rhode Island	458	15,715	3.2	43,957	304.31	46.1	14,499	15.8	18,166	40.7	126.9	204.3	2.9
South Carolina	1,737	51,641	2.9	145,555	208.11	36.4	49,860	14.4	60,595	37.9	180.0	424.1	1.6
South Dakota	352	9,101	1.0	11,595	198.03	39.9	3,474	12.3	1,911	16.7	13.7	31.0	0.6
Tennessee	2,550	81,990	2.4	219,541	209.57	33.9	61,213	13.9	86,369	34.4	327.2	608.4	1.9
Texas	9,083	326,751	2.2	544,396	258.68	37.4	201,001	16.8	336,999	62.2	1,009.0	2,241.4	1.3
Utah	1,006	30,236	2.0	63,729	275.41	47.7	20,518	14.8	27,512	41.0	68.6	252.2	0.5
Vermont	290	8,889	2.8	27,755	250.16	42.4	8,188	14.4	6,138	22.3	38.7	97.8	2.0
Virginia	3,259	118,138	1.6	173,432	311.27	44.7	52,614	14.4	67,354	39.2	151.9	753.6	0.6
Washington	2,575	97,595	4.4	280,946	328.63	45.1	112,913	19.5	111,233	38.0	948.6	1,561.7	2.1
West Virginia	661	18,480	2.7	56,791	214.92	40.0	18,064	14.0	12,923	24.1	127.3	165.3	2.8
Wisconsin	2,660	86,009	3.4	329,518	247.17	39.7	91,290	13.3	82,176	24.5	428.2	982.3	1.9
Wyoming	232	6,619	1.5	17,775	232.01	42.3	3,444	10.0	3,579	27.3	16.4	40.4	0.8
Outlying areas													
Puerto Rico	978	19,768	5.5	116,070	106.91	27.5	53,324	20.3	67,696	54.3	173.1	257.3	3.4
Virgin Islands	42	1,261	2.5	3,249	288.89	50.1	1,044	18.9	1,610	54.1	3.1	19.3	0.3

a. Based on average covered employment in 12-month period.

b. 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.

c. Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan. Excludes Extended Benefits and Emergency Unemployment Compensation.

d. Estimated data. As a percentage of taxable payroll. Standard contribution rate for most states, 2.7 percent. Excludes state and local jurisdictions covering state and local government employees on a reimbursable basis.

e. Total wages earned in covered employment during all pay periods ended within the year.

f. Includes dependents' allowances for states that provide such benefits.

g. Based on average total weekly wage in current year.

h. Percentages based on first payments for 12-month period.

SOURCES: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

NOTE: Except where noted excludes data for federal employees and for ex-servicemembers; includes data for state and local government employees where covered by state law after 1955.

CONTACT: Thomas Stengle (202) 693-2991.

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2001

Year	Estimated number of workers covered per month (millions)	Benefits paid during year (millions of dollars)						Cost of program as a percentage of covered payroll ^a	Benefits as a percentage of covered payroll ^b
		Total	Type of insurance			Type of benefits			
			Private carriers ^c	State and federal funds ^d	Employers' self-insurance ^d	Medical and hospitalization	Compensation payments		
1940	24.6	256	135	73	48	95	161	1.19	0.72
1946	32.7	434	270	96	68	140	294	0.91	0.54
1948	36.0	534	335	121	78	175	359	0.96	0.51
1949	35.3	566	353	132	81	185	381	0.98	0.55
1950	36.9	615	381	149	85	200	415	0.89	0.54
1951	38.7	709	444	170	94	233	476	0.90	0.54
1952	39.4	785	491	193	101	260	525	0.94	0.55
1953	40.7	841	524	210	107	280	561	0.97	0.55
1954	39.8	876	540	225	110	308	568	0.98	0.57
1955	41.4	916	563	238	115	325	591	0.91	0.55
1956	43.0	1,002	618	259	125	350	652	0.92	0.55
1957	43.3	1,062	661	271	130	360	702	0.91	0.56
1958	42.5	1,112	694	285	132	375	737	0.91	0.58
1959	44.0	1,210	753	316	141	410	800	0.89	0.58
1960	44.9	1,295	810	325	160	435	860	0.93	0.59
1961	45.0	1,374	851	347	176	460	914	0.95	0.61
1962	46.2	1,489	924	371	194	495	994	0.96	0.62
1963	47.3	1,582	988	388	207	525	1,057	0.99	0.62
1964	48.8	1,707	1,070	412	226	565	1,142	1.00	0.63
1965	50.8	1,814	1,124	445	244	600	1,214	1.00	0.61
1966	53.7	2,000	1,239	486	275	680	1,320	1.02	0.61
1967	55.0	2,189	1,363	524	303	750	1,439	1.07	0.63
1968	56.8	2,376	1,482	556	338	830	1,546	1.07	0.62
1969	59.0	2,634	1,641	607	386	920	1,714	1.08	0.62
1970	59.2	3,031	1,843	755	432	1,050	1,981	1.11	0.66
1971	59.4	3,563	2,005	1,098	460	1,130	2,433	1.11	0.67
1972	62.3	4,061	2,179	1,379	504	1,250	2,811	1.14	0.68
1973	66.3	5,103	2,514	1,998	592	1,480	3,623	1.17	0.70
1974	68.0	5,781	2,971	2,086	724	1,760	4,021	1.24	0.75
1975	67.2	6,598	3,422	2,324	852	2,030	4,568	1.32	0.83
1976	69.6	7,584	3,976	2,570	1,039	2,380	5,204	1.49	0.87
1977	72.1	8,630	4,629	2,750	1,250	2,680	5,950	1.71	0.92
1978	75.6	9,796	5,256	3,043	1,497	2,980	6,816	1.86	0.94
1979	78.6	12,027	6,157	4,022	1,848	3,520	8,507	1.95	1.01
1980	78.8	13,618	7,029	4,330	2,259	3,947	9,671	1.96	1.07
1981	78.3	15,054	7,876	4,595	2,583	4,431	10,623	1.85	1.08
1982	77.0	16,407	8,647	4,768	2,993	5,058	11,349	1.75	1.16
1983	78.0	17,575	9,265	5,061	3,249	5,681	11,894	1.67	1.17
1984	81.9	19,685	10,610	5,405	3,671	6,424	13,261	1.66	1.21
1985	84.3	22,217	12,341	5,744	4,132	7,498	14,719	1.82	1.30
1986	86.0	24,613	13,827	6,248	4,538	8,642	15,971	1.99	1.37
1987	88.4	27,318	15,453	6,782	5,082	9,912	17,406	2.07	1.43
1988	91.3	30,733	17,512	7,477	5,744	11,518	19,215	2.16	1.49
1989	93.7	34,316	19,918	7,965	6,433	13,424	20,892	2.04	1.46
1990	95.1	38,238	22,222	8,658	7,358	15,187	23,051	2.13	1.57
1991	93.6	42,169	24,515	9,711	7,944	16,832	25,337	2.16	1.65
1992	94.6	44,660	24,030	10,987	9,643	18,252	26,408	2.13	1.69
1993	96.1	42,925	21,773	11,294	9,857	17,521	25,403	2.17	1.62
1994	109.6	44,586	22,306	10,753	11,527	17,194	27,392	2.05	1.51
1995	112.4	43,373	21,145	10,996	11,232	16,733	26,640	1.82	1.38
1996	114.8	41,837	20,392	10,669	10,775	16,555	25,282	1.66	1.26
1997	118.1	42,313	21,645	10,046	10,623	17,306	25,007	1.48	1.18
1998	121.5	43,355	23,069	10,109	10,177	18,122	25,233	1.35	1.12
1999	124.3	45,197	24,635	10,126	10,436	19,164	26,033	1.33	1.09
2000	124.1	47,684	26,618	10,402	10,664	20,647	27,037	1.32	1.06
2001	127.0	49,354	27,060	11,004	11,290	21,956	27,398	1.39	1.07

a. Total costs to employers who purchase insurance from private carriers and state funds consist of premiums written in the calendar year plus the payments made under deductible provisions. For self-insured employers, the costs include benefit payments and administrative costs.

b. Cash and medical benefits paid by self-insurers.

c. Net cash and medical benefits paid during calendar year by private insurance companies under standard workers' compensation policies.

d. Net cash and medical benefits paid by competitive and exclusive state funds and federal benefits including: those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and by special funds under the LHWCA.

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTE: Beginning in 1959, includes Alaska and Hawaii.

CONTACT: Virginia Reno (202) 452-8097.

9.B Workers' Compensation

Table 9.B2—Benefits, by state and federal program, 1997–2001 (in thousands of dollars)

Program	1997	1998	1999	2000	2001
Total, state and federal	42,420,642	43,463,251	45,315,531	47,806,003	49,354,474
State programs					
Subtotal	39,532,961	40,487,217	42,335,025	44,726,705	46,285,207
Alabama	530,230	602,088	551,398	529,189	562,773
Alaska	128,043	127,368	130,334	145,917	171,248
Arizona	449,791	432,965	465,554	515,241	392,861
Arkansas	170,465	170,891	173,054	194,470	201,136
California	7,073,544	7,365,820	7,851,641	8,967,630	9,604,446
Colorado	820,169	810,985	738,527	835,054	581,266
Connecticut	731,830	714,822	736,857	667,056	661,471
Delaware	143,424	147,070	133,023	146,090	144,588
District of Columbia	88,449	90,386	90,232	88,661	92,463
Florida	2,442,989	2,538,353	2,768,045	2,544,777	2,639,132
Georgia	861,394	889,131	895,690	995,775	1,067,327
Hawaii	254,915	233,225	222,056	231,359	252,041
Idaho	153,209	164,327	168,642	179,370	197,151
Illinois	1,764,455	1,838,191	1,952,698	2,049,223	2,115,569
Indiana	445,840	481,073	510,992	545,863	528,005
Iowa	286,029	303,873	309,458	352,188	395,981
Kansas	313,511	318,976	326,196	341,547	340,343
Kentucky	451,246	421,386	477,867	479,338	524,566
Louisiana	439,594	442,025	464,883	493,653	501,662
Maine	282,152	253,946	265,862	266,997	263,852
Maryland	717,093	691,285	714,356	729,656	787,442
Massachusetts	746,851	728,771	733,191	828,159	763,795
Michigan	1,332,222	1,366,988	1,392,806	1,474,058	1,477,986
Minnesota	738,600	737,100	744,500	797,800	908,100
Mississippi	231,413	234,873	253,664	269,342	271,163
Missouri	979,857	979,596	1,021,046	1,084,687	1,108,464
Montana	142,957	136,975	145,996	169,763	172,725
Nebraska	216,949	164,382	198,276	211,285	237,045
Nevada	324,204	331,419	384,283	360,915	380,756
New Hampshire	173,562	169,663	190,073	181,900	214,755
New Jersey	1,079,724	1,096,758	1,152,102	1,198,172	1,198,095
New Mexico	135,684	128,290	135,903	146,374	162,022
New York	2,619,771	2,600,961	2,795,769	2,909,115	2,978,224
North Carolina	687,291	810,188	813,823	853,318	867,965
North Dakota	68,312	68,929	69,912	74,406	79,633
Ohio	2,035,906	2,076,545	2,038,742	2,098,528	2,249,200
Oklahoma	578,371	536,420	496,500	484,911	497,008
Oregon	417,222	430,521	384,110	412,471	455,625
Pennsylvania	2,492,347	2,418,072	2,467,114	2,402,614	2,440,407
Rhode Island	113,382	109,471	110,952	109,433	114,599
South Carolina	459,377	467,277	511,735	596,526	532,374
South Dakota	69,649	67,088	72,509	66,991	74,950
Tennessee	473,498	550,819	586,363	642,201	682,927
Texas	1,476,585	1,591,818	1,874,975	2,004,504	2,043,451
Utah	170,321	188,543	195,774	187,729	209,192
Vermont	86,097	91,436	106,389	112,349	105,017
Virginia	562,402	658,466	629,348	680,911	664,632
Washington	1,217,522	1,286,680	1,395,246	1,527,657	1,637,714
West Virginia ^a	614,061	644,294	687,002	690,377	712,495
Wisconsin	670,070	703,610	724,360	768,282	921,857
Wyoming	70,382	73,080	75,196	82,875	97,706
Federal programs ^b					
Subtotal	2,887,681	2,976,034	2,980,506	3,079,298	3,069,267
Civilian employee	1,900,779	2,009,862	1,999,915	2,118,859	2,223,088

a. Preliminary estimates under review by the state.

b. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

CONTACT: Virginia Reno (202) 452-8097.

Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2001
(in thousands of dollars)

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total	Private carriers ^a	State funds	Self-insurance ^b	Total	As a percentage of total benefits
Total, state and federal	49,354,474	...	...	...	21,955,890	44.5
State programs						
Subtotal	46,285,207	27,060,245	7,934,591	11,290,374	21,175,714	45.8
Alabama	562,773	304,347	...	258,425	329,138	58.5
Alaska	171,248	133,209	...	38,038	95,602	55.8
Arizona	392,861	171,438	141,660	79,762	241,217	^c 61.4
Arkansas	201,136	138,650	...	62,485	123,095	^c 61.2
California	9,604,446	5,309,044	1,471,260	2,824,142	4,467,765	46.5
Colorado	581,266	303,608	116,312	161,346	260,999	44.9
Connecticut	661,471	473,669	...	187,803	276,495	^c 41.8
Delaware	144,588	97,935	...	46,654	67,470	^d 46.7
District of Columbia	92,463	75,842	...	16,622	33,076	35.8
Florida	2,639,132	1,887,602	...	751,530	1,496,388	^c 56.7
Georgia	1,067,327	753,118	...	314,209	515,519	^c 48.3
Hawaii	252,041	164,739	12,688	74,614	103,304	41.0
Idaho	197,151	90,255	96,256	10,640	110,799	^c 56.2
Illinois	2,115,569	1,617,229	...	498,340	949,890	^c 44.9
Indiana	528,005	446,371	...	81,634	343,830	^c 65.1
Iowa	395,981	324,016	...	71,965	182,943	^c 46.2
Kansas	340,343	240,567	...	99,776	194,336	^c 57.1
Kentucky	524,566	338,591	34,799	151,176	288,952	55.1
Louisiana	501,662	248,848	108,171	144,643	265,379	^c 52.9
Maine	263,852	108,726	68,126	87,000	115,433	43.7
Maryland	787,442	391,391	211,926	184,125	311,194	39.5
Massachusetts	763,795	650,701	...	113,095	269,793	35.3
Michigan	1,477,986	809,463	...	668,523	482,602	32.7
Minnesota	908,100	613,300	91,600	203,200	432,300	47.6
Mississippi	271,163	169,687	...	101,477	148,208	54.7
Missouri	1,108,464	859,909	72,305	176,251	452,771	40.8
Montana	172,725	71,065	70,858	30,802	90,882	52.6
Nebraska	237,045	173,097	...	63,948	120,251	50.7
Nevada	380,756	235,531	...	145,226	148,169	38.9
New Hampshire	214,755	167,420	...	47,335	121,981	^c 56.8
New Jersey	1,198,095	1,082,604	...	115,492	577,487	^d 48.2
New Mexico	162,022	96,854	16,660	48,508	91,688	56.6
New York	2,978,224	1,440,904	797,109	740,211	913,244	30.7
North Carolina	867,965	678,689	...	189,276	388,848	^c 44.8
North Dakota	79,633	404	79,229	...	44,125	55.4

(Continued)

9.B Workers' Compensation

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2001
(in thousands of dollars)—Continued**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total	Private carriers ^a	State funds	Self-insurance ^b	Total	As a percentage of total benefits
State programs (cont.)						
Ohio	2,249,200	34,210	1,762,619	452,371	999,803	44.5
Oklahoma	497,008	286,686	118,987	91,334	237,073	^c 47.7
Oregon	455,625	223,980	191,825	39,820	216,747	47.6
Pennsylvania	2,440,407	1,724,421	146,715	569,271	953,435	39.1
Rhode Island	114,599	47,644	50,457	16,498	26,737	23.3
South Carolina	532,374	367,262	39,444	125,668	140,893	26.5
South Dakota	74,950	69,399	...	5,551	41,635	55.6
Tennessee	682,927	525,158	...	157,769	353,073	^c 51.7
Texas	2,043,451	1,611,537	245,144	186,770	1,232,201	^c 60.3
Utah	209,192	78,161	92,935	38,095	139,322	^c 66.6
Vermont	105,017	87,606	...	17,412	47,363	^c 45.1
Virginia	664,632	517,285	...	147,347	374,852	^c 56.4
Washington	1,637,714	27,538	1,187,235	422,941	563,451	34.4
West Virginia	712,495	...	615,581	96,916	192,387	27.0
Wisconsin	921,857	787,518	...	134,339	535,599	^c 58.1
Wyoming	97,706	3,017	94,689	...	65,967	67.5
Federal programs^e						
Subtotal	3,069,267	...	...	...	780,176	25.4
Civilian employee	2,223,088	...	...	...	623,057	28.0

- a. States with exclusive funds (Nevada, North Dakota, Ohio, Washington, West Virginia, and Wyoming) also have small amounts of benefits paid by private carriers. This results from two sources: companies with group policies that overlap states and the fact that some companies include excess workers' compensation coverage in their reports of workers' compensation benefits to A.M. Best Company.
- b. Self-insurance includes individual self-insurers and group self-insurance.
- c. Medical percentages based on data provided by the National Council on Compensation Insurance.
- d. Medical percentage based on the weighted average of states where medical data were available.
- e. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTE: ... = not applicable.

CONTACT: Virginia Reno (202) 452-8097.

Table 9.C1—Selected data on state and railroad programs, 2000

State and program ^a	Average annual covered employment (thousands)	Taxable payrolls (millions of dollars)	Average weekly number of beneficiaries (thousands)	Average weekly benefit (dollars)	Average duration per period paid (weeks)	Contributions collected (millions of dollars)	Net benefits paid (millions of dollars)	Administrative expenditures ^b (millions of dollars)
California ^c	12,693	359,670	d	d	d	d	2,305.5	162.0
State-operated fund	12,210	336,173	85.0	255.62	12.61	2,102.0	2,133.1	132.0
Private plans	482	23,497	d	399.17	12.34	182.0	172.4	30.0
Hawaii ^e (private plans)	344	7,313	26.6	351.00	3.24	50.8	30.2	d
New Jersey ^f	^g 3,503	d	d	d	d	d	470.3	30.3
State-operated fund	^g 2,806	^g 52,300	d	309.00	d	415.4	^h 375.2	27.5
Private plans	^g 697	d	d	d	d	d	122.2	2.8
New York	6,439	ⁱ 41,872	48.0	185.25	7.15	d	521.5	^f 8.7
Special state fund ^j	...	...	0.4	146.47	14.57	d	3.4	^d
Private plans ^k	6,439	41,872	47.5	184.61	7.11	d	^l 518.1	d
Puerto Rico	644	13,086	d	d	d	d	14.9	3.9
State-operated fund	124	9,229	1.2	87.65	8.70	12.9	5.6	3.5
Private plans	520	3,857	1.8	97.17	8.01	1.0	9.3	0.4
Rhode Island (state-operated fund)	409	9,860	8.3	288.93	9.90	135.0	125.4	6.6
Railroad (publicly operated fund)	246	3,091	^m 6.0	ⁿ 228.25	ⁿ 14.00	^o 48.5	^p 44.7	^o 15.7

a. Statutory programs providing short-term cash benefits to employees unable to work because of nonoccupational illness or injury.

b. State cost of administering state program and of supervising private plans.

c. Benefits and beneficiary data are for periods paid or terminated in 2000.

d. Data not available.

e. Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 2000, the fund paid \$47,386 in benefits.

f. State fiscal year data.

g. Estimated data.

h. Data are for calendar year (January 1–December 31).

i. First \$7,000 of earnings of each employee, which was paid by the employer during the calendar year.

j. For workers whose disability begins during unemployment.

k. Includes State Insurance Fund of \$11.4 million.

l. Includes medical, surgical, and hospital benefits amounting to \$61.9 million paid under approved plans.

m. For 14-day registration period.

n. For benefit year 1999–2000 (July 1, 1999–June 30, 2000).

o. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$48.5 million and administrative expenses to \$15.7 million for the system in 2000.

p. Of this amount, \$40.7 million was for regular benefits and \$4 million for extended benefits.

SOURCES: State agencies and Railroad Retirement Board.

NOTE: ... = not applicable.

CONTACT: Rita L. DiSimone (202) 358-6221.

9.D Black Lung Benefits

Table 9.D1—Benefits currently payable to miners, widows, and dependents, December 1970–2002

Year	Number				Benefits (thousands of dollars)	
	Total	Miners	Widows	Dependents ^a	Monthly amount	Annual amount
1970	111,976	43,921	24,889	43,166	12,500	111,000
1971	231,729	77,213	67,358	87,158	27,200	378,900
1972	298,963	101,802	88,067	109,094	37,800	554,400
1973	461,491	159,837	124,154	177,500	63,700	1,045,200
1974	487,216	169,097	134,700	183,419	71,500	951,300
1975	482,311	165,405	139,407	177,499	75,500	947,700
1976	469,655	158,087	142,495	169,073	77,400	963,300
1977	457,399	148,720	144,543	164,136	80,500	942,200
1978	439,970	138,648	145,829	155,493	82,300	965,100
1979	418,948	129,558	146,527	142,863	86,500	983,100
1980	399,477	120,235	146,603	132,639	91,400	1,032,000
1981	376,505	111,249	146,173	119,083	91,700	1,081,300
1982	354,569	102,234	144,863	107,472	90,800	1,076,000
1983	333,358	93,694	142,967	96,697	86,300	1,055,800
1984	313,822	85,658	140,995	87,169	85,300	1,038,000
1985	294,846	77,836	138,328	78,682	83,700	1,025,000
1986	275,783	70,253	135,033	70,497	78,900	971,000
1987	258,988	63,573	131,561	63,854	76,800	940,000
1988	241,626	56,977	127,322	57,327	73,500	904,000
1989	225,764	51,048	123,220	51,496	72,000	882,000
1990	210,678	45,643	118,705	46,330	70,000	863,400
1991	196,419	40,703	114,046	41,670	68,400	844,400
1992	182,396	35,971	109,091	37,334	66,500	822,500
1993	168,365	31,664	103,334	33,367	64,100	794,300
1994	155,172	27,828	97,414	29,930	60,600	751,900
1995	143,011	24,573	91,517	26,921	56,100	696,700
1996	131,143	21,477	85,559	24,107	52,600	654,600
1997	119,233	18,488	79,238	21,507	49,255	614,888
1998	109,271	15,964	73,420	19,887	46,204	576,389
1999	98,977	13,635	67,359	17,983	43,225	541,200
2000	89,355	11,587	61,542	16,226	40,625	509,290
2001	79,518	9,779	55,412	14,327	37,324	470,362
2002	71,584	8,394	50,404	12,786	35,017	439,337

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

CONTACT: Wayne Tacy (301) 306-6699 or Joseph Bondar (410) 965-0162.

Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2002

State or area	Number				Monthly amount (thousands of dollars)		
	Total	Miners	Widows	Dependents ^a	Total	Miners ^b	Widows ^c
All areas	71,584	8,394	50,404	12,786	35,017	5,818	29,199
Alabama	2,860	200 ^d	2,162	498 ^d	1,409	139 ^d	1,270
Alaska	11	^d	10	^d	6	^d	6
Arizona	224	19	180	25	113	13	100
Arkansas	415	44	323	48	206	30	175
California	483	39	388	56	244	25	218
Colorado	504	43	403	58	253	30	223
Connecticut	143	6	124	13	72	4	69
Delaware	94	8	77	9	47	5	42
District of Columbia	21	2	17	2	10	2	9
Florida	1,679	198	1,206	275	823	141	681
Georgia	322	29 ^d	244 ^d	49 ^d	157	19 ^d	139 ^d
Hawaii	4	^d	^d	^d	2	^d	^d
Idaho	28	3	20	5	14	2	11
Illinois	2,511	186	2,031	294	1,264	125	1,139
Indiana	1,355	124	1,016	215	681	85	597
Iowa	298	27	229	42	150	18	132
Kansas	123	3	110	10	63	2	61
Kentucky	10,359	1,680	6,198	2,481	4,900	1,200	3,700
Louisiana	37	4 ^d	27 ^d	6 ^d	18	3 ^d	16 ^d
Maine	4	^d	^d	^d	2	^d	^d
Maryland	659	59 ^d	495	105 ^d	330	39 ^d	291
Massachusetts	37	^d	31	^d	19	^d	18
Michigan	805	55 ^d	638	112 ^d	409	37 ^d	371
Minnesota	23	^d	19	^d	12	^d	11
Mississippi	47	4	35	8	23	3	20
Missouri	233	12	194	27	118	8	110
Montana	81	7 ^d	65	9 ^d	41	5 ^d	37
Nebraska	8	^d	7	^d	4	^d	4
Nevada	65	3 ^d	56 ^d	6 ^d	33	2 ^d	31 ^d
New Hampshire	3	^d	^d	^d	2	^d	^d
New Jersey	523	28	443	52	265	19	245
New Mexico	164	10	126	28	80	8	73
New York	453	20	373	60	230	14	215
North Carolina	652	61 ^d	480 ^d	111 ^d	321	43 ^d	278 ^d
North Dakota	4	^d	^d	^d	2	^d	^d
Ohio	4,371	361	3,296	714	2,183	251	1,933
Oklahoma	319	40	236	43	157	27	131
Oregon	54	6	38	10	27	4	23
Pennsylvania	17,377	1,790 ^d	13,259 ^d	2,328 ^d	8,674	1,185 ^d	7,488 ^d
Rhode Island	7	^d	^d	^d	4	^d	^d
South Carolina	227	17 ^d	166 ^d	44 ^d	112	13 ^d	99 ^d
South Dakota	2	^d	^d	^d	1	^d	^d
Tennessee	2,869	309	2,032	528	1,401	215	1,186
Texas	206	15	155	36	103	9	94
Utah	345	44 ^d	254 ^d	47 ^d	170	30 ^d	140 ^d
Vermont	6	^d	^d	^d	3	^d	^d
Virginia	5,758	868	3,671	1,219	2,763	617	2,146
Washington	132	12	107	13	66	8	58
West Virginia	14,413	2,040	9,215	3,158	6,896	1,428	5,469
Wisconsin	38	3	33	2	19	2	18
Wyoming	121	7	101	13	61	5	56
Outlying areas ^e	107	6	86	15	55	5	50

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

b. Includes benefits for wives and children.

c. Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.

d. Not shown to avoid disclosure of information regarding particular individuals.

e. Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, Virgin Islands, and foreign countries.

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

CONTACT: Wayne Tacy (301) 306-6699 or Joseph Bondar (410) 965-0162.

9.F Veterans' Benefits

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years, 1940–2002 (in thousands)

Year	Total ^a	Service-connected							Not service-connected		
		All ages	Under age 65			Aged 65 or older					
			Subtotal	Disability rating ^b		Subtotal	Disability rating ^b				
				Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent	All ages	Under age 65	Aged 65 or older
As of June 30											
1940	610	385	...	...	...	...	...	...	189	...	...
1945	1,144	912	...	...	...	...	...	...	159	...	...
1950	2,368	1,990	...	...	...	...	...	...	290	...	...
1955	2,669	2,076	...	...	...	...	...	...	531	...	...
1956	2,739	2,083	2,026	1,841	185	57	43	14	597	319	278
As of June 20											
1957	2,797	2,074	2,004	1,825	179	70	53	17	670	304	366
1958	2,850	2,064	1,980	1,807	173	84	65	19	741	279	462
1959	2,934	2,053	1,952	1,781	171	101	78	23	841	257	584
1960	3,009	2,027	1,908	1,746	162	119	93	26	947	219	728
1961	3,107	2,000	1,868	1,711	158	131	104	27	1,077	182	895
1962	3,150	1,987	1,849	1,693	156	138	109	29	1,138	166	972
1963	3,181	1,989	1,844	1,686	158	145	115	30	1,170	165	1,005
1964	3,197	1,993	1,846	1,684	162	147	117	30	1,186	176	1,010
1965	3,217	1,992	1,846	1,679	167	146	117	29	1,210	197	1,013
1966	3,201	1,993	1,850	1,677	173	143	115	28	1,196	221	975
1967	3,182	1,999	1,858	1,683	175	141	114	27	1,173	243	930
1968	3,164	2,011	1,873	1,696	177	138	112	26	1,145	265	880
1969	3,160	2,039	1,904	1,712	192	135	110	25	1,114	286	828
1970	3,181	2,091	1,950	1,754	196	141	116	25	1,086	310	776
1971	3,222	2,146	1,995	1,780	215	151	128	23	1,073	335	738
1972	3,269	2,183	2,022	1,804	218	161	135	26	1,086	381	705
1973	3,257	2,204	2,028	1,806	222	176	150	26	1,053	402	651
1974	3,241	2,211	2,018	1,796	222	193	165	28	1,030	410	620
1975	3,227	2,220	2,006	1,784	222	214	185	29	1,006	430	576
1976	3,236	2,232	1,996	1,767	229	236	209	27	1,003	456	547
As of September 30											
1977	3,280	2,248	1,989	1,759	230	258	226	32	1,032	505	527
1978	3,284	2,259	1,971	1,741	230	288	254	34	1,025	516	509
1979	3,241	2,267	1,944	1,717	227	323	285	38	974	500	474
1980	3,196	2,274	1,912	1,689	223	362	320	42	922	467	455
1981	3,154	2,279	1,873	1,656	217	406	359	47	875	438	437
1982	3,096	2,274	1,818	1,606	210	456	404	52	824	406	418
1983	3,044	2,263	1,744	1,544	200	519	461	58	781	373	408
1984	2,980	2,251	1,666	1,476	190	585	520	65	729	339	390
1985	2,931	2,240	1,589	1,408	181	651	579	72	690	306	384
1986	2,883	2,225	1,505	1,335	169	720	641	79	658	274	384
1987	2,844	2,212	1,428	1,268	160	784	698	86	631	244	387
1988	2,804	2,199	1,361	1,209	153	838	746	92	606	219	387
1989	2,776	2,192	1,302	1,156	146	890	792	98	584	196	388
1990	2,746	2,184	1,253	1,113	140	931	828	102	562	175	387
1991	2,709	2,179	1,238	1,098	140	941	838	103	530	156	375
1992	2,674	2,181	1,245	1,104	141	936	833	103	493	138	354
1993	2,660	2,198	1,265	1,122	143	932	828	104	462	128	335
1994	2,659	2,218	1,290	1,144	146	928	824	104	441	122	319
1995	2,669	2,236	1,310	1,158	152	926	819	107	433	120	313
1996	2,671	2,253	1,330	1,171	158	923	814	109	418	116	302
1997	2,667	2,263	1,346	1,178	168	917	805	112	404	112	292
1998	2,668	2,277	1,372	1,191	180	905	790	115	391	110	281
1999	2,673	2,294	1,404	1,209	195	890	771	119	379	113	266
2000	2,672	2,308	1,435	1,224	211	874	751	123	364	115	249
2001	2,669	2,321	1,464	1,238	226	857	731	126	348	116	232
2002	2,745	2,398	1,546	1,288	258	852	716	136	347	125	222

a. Persons receiving payments under special acts and as retired emergency and reserve officers are included in the total but not in the distribution.

b. Disability rated by the Department of Veterans Affairs according to average impairment of earning capacity, graduated in intervals from 10 percent to 100 percent.

SOURCE: Department of Veterans Affairs, published and unpublished data.

NOTE: ... = not applicable.

CONTACT: Mike Wells (202) 273-5106.

Table 9.G1—Average monthly number of families and recipients, total amount of cash assistance, and average monthly payment, selected years 1936–2002

Year	Temporary Assistance for Needy Families/ Aid to Families with Dependent Children ^a						Emergency Assistance ^b		
	Average monthly number (thousands)			Amount of assistance ^c			Average monthly number of families (thousands)	Total assistance payments during year (thousands of dollars)	Average monthly payment per family (dollars)
	Families	Recipients		Total (thousands of dollars)	Monthly average (dollars)				
		Total	Children		Family	Recipient			
1936	147	534	361	49,678	28.15	7.75	...	...	...
1940	349	1,182	840	133,770	31.98	9.43	...	...	...
1945	259	907	656	149,667	48.18	13.75	...	...	...
1950	644	2,205	1,637	551,653	71.33	17.64	...	...	...
1955	612	2,214	1,673	617,841	84.17	23.26	...	...	...
1960	787	3,005	2,314	1,000,784	105.75	27.75	...	...	...
1961	869	3,354	2,587	1,156,769	110.97	28.74	...	...	...
1962	931	3,676	2,818	1,298,774	116.30	29.44	...	...	...
1963	947	3,876	2,909	1,365,851	120.19	29.36	...	...	...
1964	992	4,118	3,091	1,510,352	126.88	30.57	...	...	...
1965	1,039	4,329	3,256	1,660,186	133.20	31.96	...	...	...
1966	1,088	4,513	3,411	1,863,925	142.83	34.42	...	...	...
1967	1,217	5,014	3,771	2,266,400	155.19	37.67	...	...	...
1968	1,410	5,705	4,275	2,849,298	168.41	41.62	...	...	...
1969	1,698	6,706	4,985	3,563,427	174.89	44.28	7.5	6,699	117.23
1970	2,208	8,466	6,214	4,852,964	183.13	47.77	7.5	11,396	126.14
1971	2,762	10,241	7,434	6,203,528	187.16	50.48	11.1	19,843	148.54
1972	3,049	10,947	7,905	6,909,260	188.87	52.60	19.9	44,180	184.91
1973	3,148	10,949	7,902	7,212,035	190.91	54.89	18.8	39,265	174.05
1974	3,230	10,864	7,822	7,916,563	204.27	60.72	31.3	64,031	170.38
1975	3,498	11,346	8,095	9,210,995	219.44	67.65	38.3	77,516	168.85
1976	3,579	11,304	8,001	10,140,543	236.10	74.75	27.5	55,673	168.43
1977	3,588	11,050	7,773	10,603,820	246.27	79.97	32.8	66,132	168.05
1978	3,522	10,570	7,402	10,730,415	253.89	84.60	34.5	80,919	195.24
1979	3,509	10,312	7,179	11,068,864	262.86	89.45	35.7	84,043	195.92
1980	3,712	10,774	7,419	12,475,245	280.03	96.49	48.6	113,238	194.29
1981	3,835	11,079	7,527	12,981,115	282.04	97.64	49.1	123,467	209.51
1982	3,542	10,258	6,903	12,877,906	303.02	103.60	27.5	102,344	^d 278.54
1983	3,686	10,761	7,098	13,837,228	312.82	107.16	30.0	125,246	^d 283.15
1984	3,714	10,831	7,144	14,503,710	325.44	111.60	32.1	141,137	^d 276.97
1985	3,701	10,855	7,198	15,195,835	342.15	116.65	32.6	157,304	^d 312.98
1986	3,763	11,038	7,334	16,033,074	355.04	121.05	34.8	178,284	^d 362.45
1987	3,776	11,027	7,366	16,372,535	361.37	123.73	42.4	213,903	^d 358.29
1988	3,749	10,915	7,329	16,826,794	374.07	128.47	48.8	278,906	^d 420.89
1989	3,799	10,993	7,420	17,465,943	383.14	132.40	48.7	296,841	^d 461.45
1990	4,057	11,695	7,917	19,066,541	391.67	135.86	56.0	348,986	^d 476.50
1991	4,467	12,930	8,715	20,930,600	390.44	134.89	59.7	302,894	^d 422.07
1992	4,829	13,773	9,303	21,655,881	373.71	131.03	52.7	272,853	^d 431.41
1993	5,012	14,205	9,574	22,688,016	377.24	133.10	56.8	387,113	^d 568.17
1994	5,035	14,154	9,570	22,827,399	377.78	134.30	60.5	802,258	^d 1,105.95
1995	4,791	13,418	9,135	21,608,686	375.31	134.21	84.1	3,447,361	^d 3,415.93
1996	4,434	12,321	8,469	20,614,437	386.68	139.44	69.8	2,708,401	^d 3,235.10
1997	3,740	10,376	7,042	22,031,399	490.01	176.95	81.8	403,138	^d 410.74
1998 ^e	3,050	8,347	6,034	12,925,846	353.13	129.04	...	...	...
1999	2,554	6,824	4,863	10,925,434	356.48	133.42	...	...	...
2000	2,213	5,768	4,260	10,472,620	394.36	151.30	...	...	...
2001	2,102	5,352	3,981	10,007,329	396.74	155.82	...	...	...
2002	2,045	5,059	3,790	10,105,222	411.69	166.45	...	...	...

a. Thirty-four states had converted to TANF as of January 1, 1997; eight phased in over the next 5 months; the remaining 12 waited until July 1, 1997.
 b. Reporting initiated July 1969. Number of states with program: 1969–1970, 23; 1971, 24; 1972, 27; 1973–1975, 29; 1976–1978, 26; 1979, 24; 1980–1984, 27; 1985–1986, 28; 1987, 29; 1988, 30; 1989, 31; 1990, 33; 1991, 34; 1992, 34; 1993, 35; 1994, 49; 1995, 50; 1996, 51; and 1997, 34. Program ended June 30, 1997.
 c. TANF expenditures include cash payments and services.
 d. Excludes family count and expenditures for states providing only partial data.
 e. 1998 was the first full year under the TANF data reporting system for all states.

SOURCE: Department of Health and Human Services.

NOTES: Includes nonmedical vendor payments. Includes Alaska and Hawaii, beginning in 1943; Puerto Rico and the Virgin Islands, beginning in October 1950; and Guam, beginning in July 1959.

... = not applicable.

CONTACT: Evelyn Mills (202) 401-4055.

9.G TANF/AFDC and Emergency Assistance

Table 9.G2—Average monthly number of families and recipients of Temporary Assistance for Needy Families and total amount of assistance, by state or other area, 2002

State or area	TANF effective date ^a	Average monthly number			Amount of assistance ^b		
		Families	Recipients		Total (thousands of dollars)	Monthly average (dollars)	
			Total	Children		Family	Recipient
All areas	...	2,045,477	5,059,227	3,789,975	10,105,222	411.69	166.45
Alabama	11/15/96	17,959	42,451	33,757	37,785	175.33	74.17
Alaska	7/1/97	5,926	17,219	11,666	49,824	700.70	241.13
Arizona	10/1/96	42,089	98,953	73,511	137,117	271.48	115.47
Arkansas	7/1/97	11,875	27,313	20,265	32,662	229.21	99.65
California	11/26/96	458,701	1,145,965	902,674	3,609,291	655.71	262.46
Colorado	7/1/97	12,409	32,434	23,925	52,316	351.32	134.42
Connecticut	10/1/96	23,060	51,192	36,399	121,240	438.14	197.36
Delaware	3/10/97	5,504	12,487	9,514	16,374	247.91	109.27
District of Columbia	3/1/97	16,357	42,147	31,533	65,754	335.00	130.01
Florida	10/1/96	58,795	122,272	98,645	176,176	249.70	120.07
Georgia	1/1/97	54,475	130,347	100,932	146,835	224.62	93.87
Hawaii	7/1/97	10,657	28,853	20,207	68,203	533.32	196.99
Idaho	7/1/97	1,420	2,494	2,035	4,983	292.46	166.51
Illinois	7/1/97	45,070	123,120	98,945	79,216	146.47	53.62
Indiana	10/1/96	50,766	141,500	102,088	163,780	268.85	96.45
Iowa	1/1/97	20,011	52,792	35,466	79,094	329.38	124.85
Kansas	10/1/96	14,245	36,651	25,807	51,259	299.87	116.55
Kentucky	10/18/96	34,805	77,119	57,068	99,600	238.47	107.63
Louisiana	1/1/97	23,349	59,550	47,670	66,703	238.06	93.34
Maine	11/1/96	9,632	25,092	17,104	34,554	298.94	114.76
Maryland	12/9/96	26,820	63,874	47,432	111,310	345.85	145.22
Massachusetts	9/30/96	47,961	109,254	77,305	308,346	535.76	235.19
Michigan	9/30/96	73,374	197,791	146,197	338,767	384.75	142.73
Minnesota	7/1/97	36,174	94,948	68,319	166,042	382.51	145.73
Mississippi	10/1/96	18,318	42,221	31,552	32,018	145.66	63.20
Missouri	12/1/96	44,371	116,427	82,609	131,153	246.32	93.87
Montana	12/16/96	5,967	16,810	11,036	31,442	439.10	155.87
Nebraska	12/1/96	10,544	25,944	18,790	43,067	340.39	138.33
Nevada	12/3/96	11,504	28,283	21,021	43,959	318.44	129.52
New Hampshire	10/1/96	6,124	14,659	10,017	36,329	494.36	206.53
New Jersey	2/1/97	41,714	101,856	76,790	182,629	364.85	149.42
New Mexico	7/1/97	16,830	46,079	32,772	61,714	305.57	111.61
New York	12/2/96	157,723	368,707	264,324	1,027,086	542.66	232.14
North Carolina	1/1/97	42,133	88,904	68,715	109,462	216.50	102.60
North Dakota	7/1/97	3,267	8,403	5,991	16,071	409.89	159.39
Ohio	10/1/96	83,958	189,466	140,776	306,909	304.62	134.99
Oklahoma	10/1/96	14,946	37,168	28,390	35,878	200.04	80.44
Oregon	10/1/96	18,202	41,573	30,573	115,886	530.54	232.29
Pennsylvania	3/3/97	80,037	208,557	153,497	718,108	747.68	286.94
Rhode Island	5/1/97	14,113	38,048	26,516	72,806	429.89	159.46
South Carolina	10/12/96	21,370	52,657	38,131	40,622	158.41	64.29
South Dakota	12/1/96	2,859	6,587	5,379	11,032	321.58	139.56
Tennessee	10/1/96	64,047	167,525	120,681	131,274	170.80	65.30
Texas	11/5/96	131,128	333,394	255,514	284,922	181.07	71.22
Utah	10/1/96	7,897	20,236	14,558	37,954	400.54	156.30
Vermont	9/20/96	5,069	13,250	8,502	32,218	529.67	202.64
Virginia	2/1/97	30,302	67,959	49,464	92,715	254.97	113.69
Washington	1/10/97	53,833	135,943	94,757	283,702	439.17	173.91
West Virginia	1/11/97	15,669	40,900	27,747	67,903	361.13	138.35
Wisconsin	9/30/96	19,323	46,329	37,352	103,977	448.42	187.03
Wyoming	1/1/97	438	800	673	1,016	193.46	105.87
Outlying areas							
Guam	7/1/97	^c	^c	^c	^c	^c	^c
Puerto Rico	7/1/97	21,792	62,614	43,820	34,560	132.16	46.00
Virgin Islands	7/1/97	566	2,112	1,568	1,577	232.02	62.22

a. Transition from Aid to Families with Dependent Children (AFDC) to Temporary Assistance for Needy Families (TANF) reporting systems occurred July 1, 1997, or 6 months after TANF effective date, whichever was later.

b. TANF expenditures include cash payments and services.

c. Not available.

SOURCE: Department of Health and Human Services.

NOTE: ... = not applicable.

CONTACT: Evelyn Mills (202) 401-4055.

Table 9.H1—Number of participants, total annual benefits, and average benefit, fiscal years 1962–2002

Year	Average number of participants (thousands)	Total annual benefits (thousands of dollars)	Average monthly benefit ^a (dollars)
1962	143	13,153	7.66
1963	226	18,639	6.87
1964	367	28,643	6.50
1965	424	32,494	6.39
1966	864	64,781	6.25
1967	1,447	105,455	6.07
1968	2,211	172,982	6.52
1969	2,878	228,587	6.62
1970	4,340	550,806	10.58
1971	9,368	1,522,904	13.55
1972	11,103	1,794,875	13.47
1973	12,190	2,102,133	14.37
1974	12,896	2,725,988	17.62
1975	17,063	4,386,144	21.42
1976	18,557	5,310,133	23.85
1977	17,058	5,057,700	24.71
1978	16,044	5,165,209	26.83
1979	17,710	6,484,538	30.51
1980	21,077	8,685,521	34.34
1981	22,430	10,615,964	39.44
1982 ^b	21,716	10,205,799	39.18
1983	21,630	11,153,867	42.98
1984	20,858	10,696,100	42.74
1985	19,910	10,744,200	44.99
1986	19,428	10,604,950	45.49
1987	19,113	10,500,344	45.78
1988	18,644	11,149,051	50.00
1989	18,766	10,676,436	51.85
1990	20,038	14,184,028	59.01
1991	22,629	17,307,235	63.89
1992	25,403	20,899,531	68.57
1993 ^c	26,982	22,006,031	67.96
1994 ^c	27,468	22,748,559	69.01
1995 ^c	26,619	22,765,478	71.27
1996	25,533	22,440,298	73.23
1997	22,851	19,555,263	71.31
1998	19,787	16,879,929	71.09
1999	18,123	15,761,615	72.23
2000	17,155	14,985,093	72.79
2001	17,313	15,546,941	74.83
2002	19,094	18,257,136	79.68

a. That portion of the food stamp allotment, before the elimination of the purchase requirement, represented the government's share of total food stamps received. Since January 1979, only the bonus portion of the total food stamp allotment is received by participants.

b. Excludes participants and benefits under the Puerto Rico Nutrition Assistance Program after July 1, 1982.

c. Revised data.

SOURCE: Department of Agriculture, Food and Nutrition Service.

NOTE: Between 1974 and 1979, Supplemental Security Income (SSI) recipients were made ineligible for food stamps in California, Massachusetts, Wisconsin, and selected counties in New York and Virginia because those areas supplemented SSI payments in amounts that included the value of food stamps. As of 1983 and 1992, SSI recipients were returned to the Food Stamp program in Massachusetts and Wisconsin, respectively, when those states chose to stop including a value for food stamps in the SSI supplement.

CONTACT: Jenny Genser (703) 305-2152.

9.J Low-Income Home Energy Assistance Program

Table 9.J1—Number of households receiving home energy assistance, by state and type of assistance, fiscal year 2001

State	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization and energy-related home repair
			Winter	Summer	
United States ^a	^b 4,380,375	^c 249,848	1,355,560	86,795	97,447
Alabama	53,209	20,375	16,577	18,776	611
Alaska	7,549	...	417	...	617
Arizona	^b 17,222	...	4,750	...	556
Arkansas	53,288	...	24,302	...	647
California	^b 134,236	^c ...	57,727	...	18,781
Colorado	76,470	...	2,119	...	1,826
Connecticut	78,976	...	21,465	...	...
Delaware	10,985	4,266	3,080	...	343
District of Columbia	18,879	...	5,798	...	298
Florida	20,215	38,755	44,614	23,212	1,041
Georgia	130,120	12,568	...	...	924
Hawaii	^b 5,937	^c ...	...	704	...
Idaho	30,997	...	2,688	...	1,370
Illinois	181,201	...	10,067	...	1,368
Indiana	128,608	24,799	29,000	...	1,406
Iowa	83,728	...	1,949	...	1,391
Kansas	28,027	...	6,823	...	785
Kentucky	154,147	...	70,642	...	822
Louisiana	1,738	26,649	20,769	...	319
Maine	52,421	...	3,587	...	1,822
Maryland	76,424	...	^d 1,695	...	...
Massachusetts	133,355	...	12,743	...	10,530
Michigan	302,582	...	60,867	...	2,808
Minnesota	110,341	...	33,504	...	564
Mississippi	57,617	22,186	2,712	1,717	...
Missouri	110,133	...	67,959	...	...
Montana	16,769	...	1,137	...	409
Nebraska	29,646	5,482	36,358	...	1,038
Nevada	9,025	4,884	...	...	402
New Hampshire	27,276	...	^d 3,841	...	653
New Jersey	121,419	27,447	10,915	...	1,792
New Mexico	44,502	...	2,454	...	1,123
New York	697,465	...	159,390	...	5,363
North Carolina	150,445	...	115,338	...	316
North Dakota	15,442	337	1,766	...	2,438
Ohio	245,305	...	122,491	42,380	5,363
Oklahoma	60,383	14,025	33,928	...	316
Oregon	73,043	...	7,222	...	2,438
Pennsylvania	300,462	...	124,991	...	6,251
Rhode Island	24,606	...	22,585	...	624
South Carolina	50,589	...	13,194	...	736
South Dakota	15,159	...	487	...	569
Tennessee	60,206	6,107	20,867	...	2,179
Texas	8,734	14,443	98,941	...	3,460
Utah	31,233	...	1,378	...	502
Vermont	18,483	...	5,225	...	1,078
Virginia	84,237	15,763	9,920	...	2,376
Washington	66,741	...	27,627	...	3,094
West Virginia	45,332	11,762	14,102	...	1,069
Wisconsin	115,881	...	24,737	...	3,074
Wyoming	9,587	...	1,812	...	207

- a. An unduplicated total of households assisted cannot be derived from these data because the same household may be included under more than one type of assistance.
b. Includes households that received combined heating and cooling assistance in Arizona and California and households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
c. Excludes households that received combined heating and cooling assistance in Arizona and California and households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
d. Households in winter crisis situation received expedited heating assistance.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: ... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J1.1—Number of households receiving home energy assistance, by state and type of assistance, fiscal years 1982–2001

Year	Heating ^a	Cooling ^a	Energy crisis intervention		Low-cost residential weatherization and energy-related home repair
			Winter	Summer	
1982	5,990,176	1,075,061	707,123	...	430,830
1983	6,414,448	529,036	972,894	25,342	482,620
1984	6,443,637	537,598	963,743	28,841	180,748
1985	6,545,616	511,333	857,809	27,196	217,864
1986	6,359,924	535,553	951,945	114,194	191,316
1987	6,495,409	366,721	1,060,425	60,797	172,372
1988	5,827,481	309,044	981,775	57,750	156,770
1989	5,595,268	126,977	890,616	20,384	142,584
1990	5,459,631	358,823	1,058,067	37,340	148,104
1991	5,769,346	374,483	1,004,634	39,399	127,587
1992	5,906,292	384,468	950,275	25,570	106,066
1993	5,282,993	143,279	956,435	47,169	111,295
1994	5,663,040	145,684	1,127,832	24,532	126,086
1995	5,147,619	341,041	932,263	77,915	102,817
1996	4,069,409	129,184	769,154	29,121	82,931
1997	4,069,409	129,184	769,154	19,121	82,931
1998	3,641,836	316,764	704,640	154,708	85,708
1999	3,338,720	532,619	757,410	315,470	84,106
2000	3,604,295	318,438	925,311	88,339	90,985
2001	4,380,375	249,848	1,355,560	86,795	97,447

a. Several states either provide combined heating and cooling assistance or do not differentiate between heating and cooling assistance. The data for those states are included only in the Heating category.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTES: An unduplicated total of households assisted cannot be derived from these data because the same households may be included under more than one type of assistance.

... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J2—Low-income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, by state, fiscal year 2001 (in dollars)

State	Regular federal allocation	Supplemental federal allocation	Carry-over to following fiscal year
United States ^a	1,357,793,477	451,391,311	70,117,647
Alabama	11,721,903	3,669,705	1,428,321
Alaska	6,208,712	1,990,343	606,376
Arizona	5,234,186	1,461,035	0
Arkansas	8,992,936	2,835,706	375,787
California	62,775,912	20,788,908	0
Colorado	22,019,960	7,489,006	1,624,727
Connecticut	28,758,429	9,979,036	3,835,733
Delaware	3,817,128	1,281,353	509,986
District of Columbia	4,466,231	1,468,937	315,000
Florida	18,641,042	4,191,306	0
Georgia	14,744,314	4,749,326	1,105,568
Hawaii	1,484,834	270,037	17,698
Idaho	8,457,980	2,150,441	895,627
Illinois	79,598,364	28,160,418	2,302,752
Indiana	36,033,239	12,176,687	0
Iowa	25,541,963	8,920,716	168,661
Kansas	11,718,165	4,144,494	0
Kentucky	18,755,044	5,404,852	0
Louisiana	12,048,921	3,744,827	0
Maine	17,949,919	5,863,098	469,771
Maryland	22,019,965	7,242,333	0
Massachusetts	57,503,370	19,823,314	650,000
Michigan	75,232,288	27,296,506	9,168,638
Minnesota	54,445,113	18,522,713	3,379,437
Mississippi	10,087,400	3,203,639	124,055
Missouri	31,794,695	10,457,227	0
Montana	8,558,981	2,640,787	515,407
Nebraska	12,627,881	4,438,589	875,689
Nevada	2,676,949	741,169	0
New Hampshire	10,888,570	3,655,127	120,529
New Jersey	53,270,779	19,207,718	6,523,000
New Mexico	6,600,853	2,245,669	374,997
New York	174,069,784	62,370,122	12,520,545
North Carolina	25,608,810	7,407,182	3,301,599
North Dakota	8,758,658	2,761,834	1,750,683
Ohio	70,416,650	24,115,661	6,539,841
Oklahoma	9,966,138	3,320,900	0
Oregon	16,976,776	3,963,588	826,899
Pennsylvania	93,664,086	32,500,983	6,610,234
Rhode Island	9,442,339	3,404,602	0
South Carolina	9,360,132	2,739,762	0
South Dakota	7,316,453	2,389,821	38,635
Tennessee	18,998,458	4,787,381	0
Texas	31,024,494	9,572,292	0
Utah	10,022,234	3,487,636	787,973
Vermont	8,161,371	2,647,338	0
Virginia	26,822,780	7,669,144	751,119
Washington	26,986,621	6,067,753	145,926
West Virginia	12,411,637	3,717,179	1,380,900
Wisconsin	49,008,419	16,894,822	0
Wyoming	4,101,611	1,358,289	75,535

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J2.1—Low-income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, fiscal years 1982–2001 (in dollars)

Year	Regular federal allocation	Supplemental federal allocation	Carry-over to following fiscal year
1982	1,855,265,713	123,000,000	167,622,219
1983	1,954,327,406	0	126,734,742
1984	2,052,395,279	2,200,000	160,512,007
1985	2,078,044,805	0	103,191,230
1986	1,988,842,779	0	100,034,095
1987	1,804,751,604	0	128,664,885
1988	1,516,388,203	0	76,987,683
1989	1,369,642,868	0	68,307,592
1990	1,379,023,013	49,700,470	53,923,488
1991	1,400,498,244	193,443,923	73,292,715
1992	1,460,448,621	24,431,796	78,189,483
1993	1,307,182,655	23,663,576	36,828,086
1994	1,397,090,175	322,170,703	91,639,371
1995	1,855,265,713	123,000,000	167,622,219
1996	867,303,740	178,061,574	81,479,264
1997	964,896,037	211,876,438	59,564,206
1998	964,167,635	150,896,688	55,654,317
1999	1,060,819,242	174,599,382	42,151,190
2000	1,059,828,175	731,648,623	58,888,497
2001 ^a	1,357,793,477	451,391,311	70,117,647

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J3—Estimated home energy assistance obligations, by state and type of assistance, fiscal year 2001 (in dollars)

State	Heating	Cooling	Energy crisis intervention	Weatherization
United States	^a 1,302,453,006	^b 54,735,350	474,281,110	234,197,220
Alabama	6,952,037	2,380,428	5,983,626	930,649
Alaska	8,704,243	...	284,208	^c 4,030,139
Arizona	^a 4,982,615	^b ...	1,405,352	1,514,440
Arkansas	6,164,464	...	3,999,583	2,147,702
California	^a 31,063,739	^b ...	22,205,019	19,684,960
Colorado	43,836,549	...	920,826	3,346,308
Connecticut	37,545,257	...	6,814,489	...
Delaware	3,194,550	1,050,000	616,000	630,000
District of Columbia	6,918,699	...	1,000,000	873,469
Florida	2,117,897	3,960,450	15,997,444	3,337,938
Georgia	17,313,858	2,515,840	...	2,000,737
Hawaii	^a 1,509,047	^b ...	66,046	...
Idaho	6,394,427	...	1,039,661	2,642,951
Illinois	119,427,603	...	9,103,020	16,089,906
Indiana	37,812,921	954,013	3,406,949	8,215,392
Iowa	43,775,132	...	1,232,826	2,693,869
Kansas	10,140,405	...	2,535,101	1,851,953
Kentucky	14,489,026	...	7,583,593	4,023,650
Louisiana	2,351,796	7,055,390	3,044,242	1,920,157
Maine	20,580,155	...	1,249,816	4,710,451
Maryland	34,559,038	...	...	...
Massachusetts	78,755,827	...	^d 8,557,446	4,000,000
Michigan	75,869,231	...	22,431,839	12,152,377
Minnesota	58,851,989	...	17,238,371	2,373,319
Mississippi	8,523,334	2,272,889	568,221	...
Missouri	26,390,001	...	22,931,225	...
Montana	7,994,730	...	269,277	3,239,773
Nebraska	5,421,890	592,096	10,654,121	2,276,657
Nevada	2,797,917	1,106,759	^d 987	...
New Hampshire	15,047,793	...	...	850,000
New Jersey	64,413,570	2,747,000	11,831,000	3,246,000
New Mexico	10,219,960	...	1,545,320	^d ...
New York	107,401,024	...	113,242,106	42,582,158
North Carolina	11,843,457	...	14,840,753	3,936,704
North Dakota	8,121,985	^e ...	1,598,719	2,090,888
Ohio	46,510,148	...	50,173,880	9,453,229
Oklahoma	19,189,305	2,088,735	5,942,372	896,953
Oregon	16,135,232	...	1,473,758	4,244,195
Pennsylvania	76,639,340	...	62,900,000	16,851,279
Rhode Island	9,353,098	...	2,825,114	1,927,041
South Carolina	4,997,258	...	6,990,066	1,674,599
South Dakota	9,030,294	...	600,000	1,770,630
Tennessee	13,760,997	1,189,292	5,033,750	1,903,012
Texas	5,069,161	21,767,574	2,981,859	10,463,872
Utah	12,329,322	...	603,850	2,489,028
Vermont	13,189,281	...	1,540,167	...
Virginia	25,624,956	3,244,192	2,708,018	5,644,346
Washington	26,997,172	...	1,206,754	5,717,502
West Virginia	9,061,501	1,810,692	3,458,788	2,618,526
Wisconsin	68,479,467	...	11,203,318	9,785,486
Wyoming	4,600,308	...	442,230	1,364,975

- a. Includes funds for households that received combined heating and cooling assistance in Arizona and California and households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- b. Excludes funds for households that received combined heating and cooling assistance in Arizona and California and households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- c. Includes \$1.9 million in state funds for weatherization assistance.
- d. State provided weatherization assistance with funds obligated in fiscal year 2000.
- e. State provided cooling assistance with funds obligated in fiscal year 2000.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTES: Includes federal LIHEAP appropriated funds and nonfederal funds operated through the LIHEAP program.

... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J3.1—Estimated home energy assistance obligations, by type of assistance, fiscal years 1982–2001 (in dollars)

Year	Heating ^a	Cooling ^a	Energy intervention crisis	Weatherization
1982	1,124,476,630	51,498,572	138,941,133	136,195,046
1983	1,343,267,155	33,020,830	191,771,756	195,463,612
1984	1,372,772,591	32,374,067	225,795,893	186,662,906
1985	1,466,721,924	29,135,118	191,407,205	227,096,051
1986	1,351,903,078	35,620,945	199,178,003	193,420,839
1987	1,280,302,113	29,581,262	197,719,071	220,419,633
1988	1,145,560,993	21,151,405	190,046,023	170,292,505
1989	1,017,024,757	12,341,113	187,442,779	147,952,928
1990	1,030,150,903	25,007,676	188,844,316	133,479,484
1991	1,098,583,280	27,416,776	220,795,517	129,279,737
1992	990,903,081	22,645,002	197,218,623	134,816,010
1993	948,596,196	22,274,975	183,189,522	146,444,590
1994	1,062,552,111	24,862,635	225,583,805	214,342,289
1995	884,846,144	43,883,481	212,713,182	159,076,150
1996	696,801,144	17,597,204	167,622,219	135,835,358
1997	749,704,757	18,755,118	176,095,176	153,589,045
1998	633,618,243	62,178,981	212,043,081	138,217,577
1999	684,600,568	72,294,009	210,175,301	145,039,987
2000	818,811,085	72,445,852	249,906,169	158,628,023
2001	1,302,453,006	54,735,350	474,281,110	234,197,220

a. Several states either provide combined heating and cooling assistance or do not differentiate between heating and cooling assistance. The data for those states are included only in the Heating category.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: Includes federal LIHEAP appropriated funds and nonfederal funds operated through the LIHEAP program.

CONTACT: Leon Litow (202) 401-5304.

Appendixes

A. Sampling Variability	A.1
B. OASDI Benefit Award Data	B.1
C. Poverty Data	C.1
D. Computing a Retired-Worker Benefit	D.1

Appendix A: Sampling Variability

A substantial number of tables in sections 5 and 6 present OASDI award and current-pay benefit data based on 1 percent and 10 percent sample files drawn from the Social Security Administration's administrative records. In addition, Tables 4.B1–4.B12 on the taxable earnings of OASDI workers are based on 1 percent administrative record samples, and Tables 7.A8, 7.B9, and 7.E2 on SSI awards are based on 10 percent administrative record samples.

Because of sampling variability, estimates based on sample data may differ from the figures that would have been obtained had all, rather than specified samples, of the records been used. The standard error is a measure of the sampling variability. About 68 percent of all possible probability samples selected with the same specifications will give estimates within one standard error of the figure obtained from a compilation of all records. Similarly, approximately 90 percent will give estimates within 1.645 standard errors, about 95 percent will give estimates within two standard errors, and about 99 percent will give estimates within two and one-half standard errors. The standard error of an estimate depends on the design elements such as the method of sampling, sample size, and the estimation process.

Because of the large number of data cells tabulated from the sample files, it is not practical to calculate the standard error for every possible cell. However, standard errors for a large number of cells were estimated. These estimates were used to fit regression curves to provide estimates of approximate standard errors associated with tabulated counts and proportions.

The tables showing the sampling variability provide a general order of magnitude for similar estimates from the various sample files. Table A-1 presents approximate standard errors for the estimated number of persons from the 1 percent and the 10 percent files. The reliability of an estimated percentage depends on both the size of the percentage and on the size of the total on which the percentage is based. Data in Table A-2 provide approximations of the standard errors of the estimated percentage of persons in the 1 percent and 10 percent files. The standard errors are expressed in percentage points and the bases shown are in terms of inflated data.

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Table A-1.
Approximations of standard errors of estimated number of persons

Size of estimate (inflated)	Standard error
<i>1 percent file</i>	
500	250
1,000	300
2,500	500
5,000	800
7,500	900
10,000	1,100
25,000	1,700
50,000	2,400
75,000	3,000
100,000	3,400
250,000	5,400
500,000	7,800
750,000	9,600
1,000,000	11,100
5,000,000	25,800
10,000,000	36,900
25,000,000	57,700
50,000,000	76,100
75,000,000	82,900
<i>10 percent file</i>	
100	30
500	70
1,000	100
5,000	225
10,000	300
50,000	700
100,000	1,000
500,000	2,200
1,000,000	3,200
2,000,000	4,300
3,000,000	5,300
5,000,000	6,500
10,000,000	8,500
20,000,000	9,300

Table A-2.
Approximations of standard errors of estimated
percentage of persons

Size of base (inflated)	2 or 98	5 or 95	10 or 90	25 or 75	50
<i>1 percent file</i>					
1,000	4.7	7.3	10.1	14.5	16.8
10,000	1.5	2.3	3.2	4.6	5.3
50,000	0.7	1.0	1.4	2.1	2.4
100,000	0.5	0.7	1.0	1.5	1.7
500,000	0.2	0.3	0.4	0.7	0.8
1,000,000	0.1	0.2	0.3	0.5	0.5
5,000,000	0.1	0.1	0.1	0.2	0.2
10,000,000	a	0.1	0.1	0.2	0.2
50,000,000	a	a	a	0.1	0.1
100,000,000	a	a	a	a	a
<i>10 percent file</i>					
500	1.9	3.0	4.1	5.9	6.8
1,000	1.3	2.1	2.9	4.1	4.8
2,500	0.8	1.3	1.8	2.6	3.0
10,000	0.4	0.6	0.9	1.3	1.5
50,000	0.2	0.3	0.4	0.6	0.7
100,000	0.1	0.2	0.3	0.4	0.5
500,000	a	0.1	0.1	0.2	0.2
1,000,000	a	0.1	0.1	0.1	0.2
5,000,000	a	a	a	a	0.1
10,000,000	a	a	a	a	a
50,000,000	a	a	a	a	a

a. Less than 0.05 percent.

Appendix B: OASDI Benefit Award Data

OASDI benefit award data in the *Annual Statistical Supplement* are derived mainly from two sources:

- **100 percent award data:** The Master Beneficiary Record (MBR) is the major administrative data base for the Social Security program. It is used for the calculation of benefits and the maintenance of information about beneficiaries. Each month, when the MBR is updated, a record of award actions is created. This record is used to prepare award data on a 100 percent basis. Data available each month include types of benefits awarded, sex of beneficiary, and the monthly benefit amounts payable. These data are used to update the time-series tables.
- **Award data from the OASDI 1 percent sample:** This source provides monthly award data based on a 1 percent sample derived from the MBR. The 12 monthly files are combined to produce an annual file. The 1 percent sample is used to prepare award tables, which show detailed data by age, sex, and type of benefit, and distributions by benefit amount. Award data from the 1 percent sample are similar to the data described above. An important difference, however, is the treatment of dual entitlement.

When a retired-worker beneficiary subsequently becomes dually entitled to a secondary benefit as a wife, husband, or widow or widower, the secondary benefit is counted as an award in the 100 percent data. In contrast, award data based on the OASDI 1 percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

CONTACT: Joseph Bondar (410) 965-0162.

Appendix C: Poverty Data

Table 3.E1 presents weighted average poverty thresholds for families in the United States for 1959–2001. Table 3.E2 presents data on the number and percentage of people in poverty in the United States for 1959–2000. Tables 3.E3, 3.E4, and 3.E6 present more detailed data on people and families in poverty in the United States during 2000. (Both poverty thresholds and poverty population data are issued by the U.S. Census Bureau.) Table 3.E8 presents poverty guidelines by family size for the contiguous United States, Alaska, and Hawaii for 1965–2002. (Poverty guidelines are issued by the U.S. Department of Health and Human Services.)

Poverty thresholds are used primarily for statistical purposes—producing statistics on the number of Americans in poverty. Poverty guidelines are used for administrative purposes—for example, to determine whether a person or family is financially eligible for assistance or services under certain federal government programs (not including cash public assistance). Both thresholds and guidelines are sets of dollar figures that vary by family size and (in the case of the thresholds) family composition.

The poverty thresholds were developed in 1963–1964 by Mollie Orshansky of the Social Security Administration as a measure of income inadequacy. The poverty definition was modified in 1969 and 1981 by federal interagency committees. The thresholds were based on food expenditure/income patterns (from the Department of Agriculture's 1955 Household Food Consumption Survey) and the costs of the Department of Agriculture's economy food plan for families of different sizes and compositions. (See Joseph Dalaker, U.S. Census Bureau, "Poverty in the United States: 1998," *Current Population Reports: Consumer Income*, Series P60-207, September 1999, Appendix A, for an explanation of the poverty definition.) While the poverty thresholds in some sense represent families' needs, the official poverty measure should be interpreted as a statistical yardstick rather than as a complete description of what people and families need to live.

The poverty thresholds have become the basis for the official statistics on the extent of poverty in the United States, which are issued annually by the Census Bureau in the Current Population Reports series. The thresholds are adjusted annually for price changes using the annual average consumer price index (CPI-U). (See U.S. Bureau of the Census, "Revision in Poverty Statistics, 1959 to 1968," *Current Population Reports: Special Studies*, Series P-23, No. 28, August 1969; and Directive No. 14, "Definition of Poverty for Statistical Purposes," *Statistical Policy Handbook*, U.S. Department of Commerce, Office of Federal Statistical Policy and Standards, 1978.)

The poverty guidelines are a simplified version of the poverty thresholds; there are separate sets of guidelines for the two noncontiguous states (Hawaii and Alaska). The

guidelines are used for determining whether a person or family is financially eligible for assistance or services under certain federal programs. Authorizing legislation or regulations for specific programs indicate whether a program uses the poverty guidelines as one of several eligibility criteria, uses a modification of the guidelines (for example, 125 percent or 185 percent of the guidelines), or uses them for the purpose of setting priorities in providing assistance or services.

Since 1973, the guidelines have been computed from the poverty thresholds by increasing the most recently published weighted average poverty thresholds by the percentage change in the CPI-U over the past year (more precisely, from the next most recent calendar year to the most recent calendar year) and rounding the figure for a family of four up to the next highest multiple of \$50. Figures for all family sizes over and under four persons are computed by adding or subtracting equal dollar amounts derived from the average difference between poverty lines (rounded to the nearest multiple of \$20).

The poverty thresholds were calculated using data (the 1955 Household Food Consumption Survey) that defined income as after-tax money income; accordingly, the thresholds were intended to be applied to data on money income. The National Research Council's Panel on Poverty and Family Assistance put great emphasis on the principle of consistency in poverty measurement—that the definition of family resources (income) used should be consistent with the concept underlying the poverty thresholds. (For a discussion of this principle, see *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael (eds.), Washington, D.C., National Academy Press, 1995, pp. 4, 9-10, 37-40, 65-66, 98, 203-206, and 227-231. This important report proposed a new approach for developing an official poverty measure for the United States.) According to the Panel's principle of consistency, it would be inappropriate to apply the current poverty thresholds (calculated using an income definition of after-tax money income) to an income distribution that used an income definition of money income plus selected noncash benefits.

As noted above, the poverty thresholds were developed in 1963–1964 by Mollie Orshansky of the Social Security Administration. In May 1965—just over a year after the Johnson Administration had initiated the War on Poverty—the Office of Economic Opportunity adopted Orshansky's thresholds as a working or quasi-official definition of poverty. At that time, the thresholds comprised a matrix of 124 detailed poverty thresholds based on the total number of family members, the number of family members who were related children under age 18, the sex of the family householder, the age of the individual or family householder (for one- and two-person units only), and whether the family lived on a farm.

In 1969, a federal interagency committee made two changes in the poverty definition: the thresholds would be annually updated by the consumer price index instead of by the per capita cost of the economy food plan, and farm poverty thresholds would be set at 85 percent rather than 70 percent of corresponding nonfarm thresholds. (Poverty threshold and poverty population figures for prior years were retabulated retrospectively on this basis.) In August 1969, the Bureau of the Budget designated the poverty thresholds with these revisions as the federal government's official statistical definition of poverty.

In 1981, several other changes recommended by another interagency committee were made in the poverty definition: (1) elimination of separate thresholds for farm families, (2) elimination (through appropriate averaging) of separate thresholds for female-householder and "all other" families, and (3) extension of the poverty matrix to make the largest family size category "nine persons or more" rather than "seven or more persons." (See U.S. Bureau of the Census, "Characteristics of the Population Below the Poverty Level: 1980," *Current Population Reports: Consumer Income*, Series P-60, No. 133, July 1982, pp. 2-5, 9, and 186.) As a result of these changes, the current matrix of poverty thresholds used by the Census Bureau to determine the poverty status of families and unrelated individuals consists of a set of 48 detailed thresholds arranged in a two-dimensional matrix by family size (number of family members, ranging from one person, that is, an unrelated individual, to nine or more persons) cross-classified by the presence and number of family members who are related children under age 18 (from no children to eight or more children present). Unrelated individuals and two-person families are further differentiated by the age of the individual or family householder (under age 65 and aged 65 or older).

The current official definition of poverty is over 30 years old. In 1990, Congress requested a study of the official U.S. poverty measure by the National Research Council (NRC) to provide a basis for a possible revision of the poverty measure. In 1992, the NRC's Committee on National Statistics appointed a Panel on Poverty and Family Assistance to conduct this study. In 1995, the Panel published its report of the study, *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael (eds.), Washington, D.C., National Academy Press, 1995. In the report, the Panel proposed a new approach for developing an official poverty measure for the United States—although it did not propose a specific set of dollar figures. The Panel's proposed approach focused on three major areas: new poverty thresholds, a new and consistent definition of family resources (income), and data sources.

In July 1999, the Census Bureau, in collaboration with the Bureau of Labor Statistics, released a report, *Experimental Poverty Measures: 1990 to 1997 (P60-205)* that examined the effects of different resource definitions and

thresholds on poverty and which estimated several experimental poverty rates based on the NRC panel's recommendations. That report and subsequent updates are available on the Census Bureau poverty measurement Web page at <http://www.census.gov/hhes/www/povmeas.html>.

Data on the poverty population and on family and personal income are collected in the Current Population Survey Annual Social and Economic Supplement (CPS ASEC), formerly known as the March Supplement. Following the standard Census Bureau definition, the family is defined as two or more persons related by birth, marriage, or adoption and residing together. "Income" refers to money income before federal, state, or local personal income taxes and excludes capital gains and lump-sum payments; however, public income transfers are included. Money income does not reflect that many families receive noncash benefits such as employee use of business transportation and facilities, employer-paid health insurance and other employer-supported fringe benefits, Medicare, Medicaid, food stamps, and housing assistance. Many farm families receive benefits in the form of rent-free housing or goods produced and consumed by the family.

Every year between February and April, the sample of U.S. households interviewed in the monthly CPS is asked to provide information on household members' incomes during the preceding calendar year. Survey experience indicates that respondents tend to underreport their income in household surveys. Underreporting is most pronounced for dividends, interest, and workers' compensation; less pronounced for veterans' payments, public assistance, and private pensions; and modest for Social Security and other federal retirement programs. The proportion of nonresponses to CPS income questions is greater among middle income and higher income families than among lower income families.

Because the CPS sample size, content, and procedures changed several times, some differences in the data over time may in part reflect these methodological changes, not just changes in the population. Important changes to the CPS methodology took place for data years 1976, 1979, 1980, 1987, 1988, 1992, 1994, 1995, and 2000. A summary of these changes and references for more information about them appear below. The report numbers, "P60-#" refer to the Current Population Reports, Consumer Income series.

For details about how questionnaire changes and file processing changes affected the data, see 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 63RV, available at <http://www.bls.census.gov/cps/tp/tp63.htm>.

If you need to find additional poverty data, you may browse the U.S. Census Bureau poverty Web site at <http://www.census.gov/hhes/www/poverty.html>, or contact the U.S. Census Bureau's Housing and Household Economic Statistics Division Information Staff at (301) 763-3242 or e-mail hhes-info@census.gov.

For further information about technical changes to the poverty measure, contact Joe Dalaker at (301) 763-3213 or e-mail joseph.dalaker@census.gov.

For further information about the statistical reliability of the CPS estimates, contact dsmd_s&a@census.gov.

Year	Methodological change	Reference
1959	First year for which poverty data are available. The poverty measure was developed in 1963–1964.	P60-210, Appendixes.
1969	Modification of poverty measure. Bureau of the Budget prescribed the new measure as the official poverty measure for statistical use in federal agencies.	P60-68, pp. 11–12.
1976–1987	For wide income intervals, Pareto interpolation was used to compute median income. Before 1976 and after 1987, linear interpolation was used.	P60-166, p. 93.
1979	"Householder" concept first implemented, replacing "head" concept—the husband is no longer automatically the family reference person. Secondary families (people who are related to each other but not the householder) are tallied separately from "families." Change in universe—income questions no longer asked of 14-year-olds. Poverty universe changed—people under age 15 not living with any family members are excluded. (Previously, unrelated individuals under age 14 were excluded.)	P60-130, pp. 6–10.
1980	Modification of poverty measure (final approval in 1981). Estimates weighted using 1980 Census results.	P60-133, pp. 2–7.
1987	New CPS processing system.	P60-166, pp. 1, 14–17; Welniak, 1990 ASA proceedings.
1988	Linear interpolation used to compute median incomes.	P60-166, p. 93.
1992	Estimates first weighted using 1990 Census results.	P60-188, p. vii.
1994	Computer-assisted interviewing replaced pencil-and-paper interviewing.	P60-189, p. vii.
1994–1995	New CPS sample design.	P60-189, p. vii and Table D-3; P60-194, pp. v and xiii and Table D-3.
1995	Revised edit and allocation procedures for race groups.	P60-194, pp. v and xiii.
2000	Expansion of CPS sample interviewed from about 50,000 households to about 78,000 households nationwide. Poverty data for 2000 and 2001 from sample expansion first published in P60-219, Poverty in the United States: 2001. In the same report, data were weighted using Census 2000 results.	P60-219, Appendix B.
2002	For the first time, the 2003 CPS ASEC recorded multiple categories for respondents who identified themselves with more than one race. We do not know how people who reported more than one race in 2002 previously reported their race. Therefore, there is no single way to compare changes to poverty by race between 2001 and 2002. The "Asian or Pacific Islander" race category was divided into two groups: "Asians" and "Native Hawaiians and Other Pacific Islanders."	P60-222, pp. 2–3, 5.

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Appendix D: Computing a Retired-Worker Benefit

Overview

This section provides instructions and a worksheet for computing a retired-worker benefit. The worksheet can be used for persons born in 1928 through 1941—that is, those who attained age 62 in 2003 or earlier and were under age 75 at the end of 2003. 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 2003, actual earnings in 1984 of \$20,000 are indexed to \$40,807.90, based on 2001 wage levels. Earnings after age 60 are included at their actual (nominal) value.
- *To replace a portion of the indexed earnings.* Indexed earnings are averaged over the number of computation years to calculate the average indexed monthly earnings (AIME). A benefit formula is applied to the AIME to produce the primary insurance amount (PIA), the amount payable to a worker who retires at the full retirement age (FRA). The benefit formula is weighted to provide a higher replacement of earnings for lower wage workers. The formula for persons age 62 in 2003 is 90 percent of the first \$606 of AIME; plus 32 percent of the next \$3,047; plus 15 percent of the AIME over \$3,653.
- *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 8 months in the year 2003 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 2003, the maximum reduction is 23 1/3 percent if the individual is entitled to benefits for all 44 months between 62 and 65 and 8 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 2002 benefit increase was 1.4 percent. These cost-of-living adjustments are applied to the benefit for each year after the person attained age 62—even if the person was not actually receiving benefits.
- *To give credit for earnings after age 61.* Earnings after age 61 (which are not indexed) can be substituted for earnings in earlier years if they result in a higher benefit. In addition, persons who do not receive benefits between the FRA and age 69 may receive increased benefits as a result of the delayed retirement credit (DRC) provision. The benefit is increased by a specified percentage for each month a benefit was not received (See Table 2.A20 for percentage increases).

Clarifying the Worksheet Procedure

Step 1 - Determining the Number of Computation Years

For persons who attain age 62 prior to 1991, the number of years used in the benefit computation equals the number of years after 1950 up to the year of attainment of age 62, minus 5 years. For workers who attain age 62 in 1991 or later, the number of computation years is 35.

Step 2 - Wage Indexing of Earnings

The following description and examples are provided for persons who wish to compute the index factors and indexed earnings. The indexing year is the second year prior to attainment of age 62. However, beneficiaries born on January 1 are deemed to have attained age 62 in the prior year, and consequently, the applicable indexing year, factors, and bend points are those for that year.

The average wage for the indexing year is divided by the average wage in each prior year to obtain the factor for each prior year. For example, a person attains age 62 in 2003. The indexing year is 2001. The average annual wage for 2001 was \$32,921.92. The average annual wage for 1990 was \$21,027.98. The amount, \$32,921.92 divided by \$21,027.98, yields a factor of 1.5656245.

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 1.5656245, result in indexed earnings of \$15,656.25; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$80,316.54.

Step 3 - Computing the Average Indexed Monthly Earnings (AIME)

After the earnings in each year have been indexed, they are used in computing average indexed monthly earnings. The years of highest indexed earnings corresponding to the number of computation years are selected and totaled. This total is then divided by the number of months in the computation years. The result, rounded to the nearest lower dollar, is the average indexed monthly earnings.

For example, for a person attaining age 62 in 2003, 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 2003, the bend points are \$606 and \$3,653. Thus the formula is 90 percent of the first \$606 of AIME; plus 32 percent of next \$3,047 of AIME; plus 15 percent of AIME above \$3,653. 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 \$656.12 rounded to \$656.10

Based on: 90 percent of \$606 (\$545.40); plus
32 percent of \$346 (\$110.72)

Example 3 - AIME of \$3,700

PIA is \$1,527.49 rounded to \$1,527.40

Based on: 90 percent of \$606 (\$545.40); plus
32 percent of \$3,047 (\$975.04); plus
15 percent of \$47 (\$7.05)

The above calculations are applicable to workers who attain age 62 in 2003. 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 2003. Worksheet 2 shows cost-of-living increase factors for 1979 through 2002. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2002. The result is the current 2003 PIA.

For example, a worker who attained age 62 in 2000 would receive cost-of-living adjustments for the years 2000–2002. 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:

2000: \$500 multiplied by 1.035 = \$517.50

2001: \$517.50 multiplied by 1.026 = \$530.90

2002: \$530.90 multiplied by 1.014 = \$538.30

\$538.30 would be the PIA effective December 2002.

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 2003 have their benefits computed based on the full retirement age of 65 and 8 months. See Table 2.A17.1 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 2003, the maximum reduction is 23 1/3 percent.

For example, in 2003 a worker with a PIA of \$500 would receive \$383.33 at age 62. The PIA is reduced by \$116.67, 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 8 months for a total reduction of 23 1/3 percent. After reduction of the PIA by \$116.67, 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 1990–2003)

STEP 1.—Determining the Number of Computation Years		
1	Year of birth. (If your birthday is January 1, enter prior year.)	
2	Age "62" has been entered.	62
3	Add lines 1 and 2 to obtain year of attainment of age 62 (year of eligibility).	
4	Year of attainment of age 22. If 1951 or earlier, enter 1951 (If your birthday is January 1, enter prior year.)	
5	Subtract line 4 from line 3 (elapsed years).	
6	"5" (drop-out years) has been entered.	5
7	Subtract line 6 from line 5 (computation years—maximum 35).	
STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.)		
8	Enter in column 2 your earnings in each year 1951 through 2002. 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 1990-2003.)	
12	Multiply column 4 by column 5 and enter results in column 6 in dollars and cents. These are your indexed earnings.	
STEP 3.—Computing the Average Indexed Monthly Earnings (AIME)		
13	Enter the number of computation years from line 7.	
14	Place an "X" in column 7 next to the highest indexed earnings corresponding with the number of computation years from line 13.	
15	Add all individual indexed earnings marked with an "X."	
16	Multiply line 13 (computation years) by 12 to obtain the number of months in the computation period.	
17	Divide line 15 by line 16.	
18	Round the result in line 17 to next lower dollar. This is your average indexed monthly earnings (AIME).	
STEP 4.—Computing the Primary Insurance Amount (PIA) (Use Worksheet 2 for Step 4.)		
19	Enter first bend point from Worksheet 2 based on year of attainment of age 62, or prior year if birthday is January 1.	
20	Enter second bend point from Worksheet 2.	
21	If your AIME (obtained in line 18) is equal to or less than line 19, complete lines 22–24; If greater than line 19 but less than or equal to line 20, complete lines 25–30; If greater than line 20, complete lines 31–37.	
22	Enter your AIME from line 18.	
23	"0.9" has been entered. If you receive a pension based on noncovered employment see Table 2.A11.1.	0.9
24	Multiply line 22 by line 23 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
25	Enter your AIME from line 18.	
26	Multiply line 19 by 0.9. If you receive a pension based on noncovered employment see Table 2.A11.1.	
27	Subtract line 19 from line 25.	
28	"0.32" has been entered.	0.32
29	Multiply line 27 by line 28.	
30	Add lines 26 and 29 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
31	Enter your AIME from line 18.	
32	Multiply line 19 by 0.9. If you receive a pension based on noncovered employment see Table 2.A11.1.	
33	Subtract line 19 from line 20 and multiply by 0.32.	
34	Subtract line 20 from line 31.	
35	"0.15" has been entered.	0.15
36	Multiply line 34 by line 35.	
37	Add lines 32, 33, and 36 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	

(Continued)

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1990–2003)—Continued

38	If you attained age 62 in 2003, 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 2002 by using lines 39–43 and Worksheet 2.	
39	Enter year of attainment of age 62 from line 3.	
40	Place an "X" corresponding to the year you attained age 62 in column 5, Worksheet 2.	
41	Place an "X" in column 5 (Worksheet 2) next to each subsequent year through 2002.	
42	Enter your age 62 PIA from either line 24, 30, or 37—here and in the first row of column 6, Worksheet 2.	
43	Beginning with first year marked, multiply your age 62 PIA by the corresponding factor (column 4), round to lower dime, and enter in column 6. The resulting PIA is then multiplied by the next factor and is again rounded to lower dime. Continue this process through 2002. Enter this last figure, which is your current PIA.	
STEP 5.—Computing the Monthly Benefit		
44	Enter your current PIA from either line 24, 30, 37, or 43.	
45	Using Table 2.A17.1, determine your full retirement age and enter here.	
46	If you retired at your full retirement age round PIA from line 44 to next lower dollar to obtain your monthly benefit.	
47	If you retired before the full retirement age enter your age at retirement including year and months.	
48	Subtract line 47 from line 45 and convert the result to months to determine the total number of reduction months.	
49	If line 48 is greater than 36 subtract 36 and enter the number here.	
50	"0.0055556" (the decimal equivalent of 5/9 of 1 percent—the monthly reduction factor for the first 36 months) has been entered.	0.0055556
51	"0.0041667" (the decimal equivalent of 5/12 of 1 percent—the monthly reduction factor for months above 36) has been entered.	0.0041667
52	Multiply line 48 (but not more than 36) by line 50 to obtain the percentage reduction for the first 36 months.	
53	Multiply line 49 by line 51 to obtain the percentage reduction for months in excess of 36.	
54	Add lines 52 and 53 to obtain the total percentage reduction.	
55	Multiply line 44 by line 54 to obtain the amount of benefit reduction.	
56	Subtract line 55 from line 44 and round to next lower dollar to obtain your monthly benefit.	

Worksheet 1: Indexing of earnings

Year	Your earnings	Maximum taxable earnings (dollars)	Lower of columns 2 or 3	Indexing factor	Column 4 times column 5	Highest indexed earnings
1	2	3	4	5	6	7
1951		3,600				
1952		3,600				
1953		3,600				
1954		3,600				
1955		4,200				
1956		4,200				
1957		4,200				
1958		4,200				
1959		4,800				
1960		4,800				
1961		4,800				
1962		4,800				
1963		4,800				
1964		4,800				
1965		4,800				
1966		6,600				
1967		6,600				
1968		7,800				
1969		7,800				
1970		7,800				
1971		7,800				
1972		9,000				
1973		10,800				
1974		13,200				
1975		14,100				
1976		15,300				
1977		16,500				
1978		17,700				
1979		22,900				
1980		25,900				
1981		29,700				
1982		32,400				
1983		35,700				
1984		37,800				
1985		39,600				
1986		42,000				
1987		43,800				
1988		45,000				
1989		48,000				
1990		51,300				
1991		53,400				
1992		55,500				
1993		57,600				
1994		60,600				
1995		61,200				
1996		62,700				
1997		65,400				
1998		68,400				
1999		72,600				
2000		76,200				
2001		80,400				
2002		84,900				

Worksheet 2: Computing the primary insurance amount (PIA) for workers retiring after age 62

Year	1st bend point (dollars)	2nd bend point (dollars)	Cost-of-living increase (percent)	Cost-of-living factor	Years aged 62 or older	PIA (dollars)
	1	2	3	4	5	6
Age 62 PIA						
1979	180	1,085	9.9	1.099		
1980	194	1,171	14.3	1.143		
1981	211	1,274	11.2	1.112		
1982	230	1,388	7.4	1.074		
1983	254	1,528	3.5	1.035		
1984	267	1,612	3.5	1.035		
1985	280	1,691	3.1	1.031		
1986	297	1,790	1.3	1.013		
1987	310	1,866	4.2	1.042		
1988	319	1,922	4.0	1.040		
1989	339	2,044	4.7	1.047		
1990	356	2,145	5.4	1.054		
1991	370	2,230	3.7	1.037		
1992	387	2,333	3.0	1.030		
1993	401	2,420	2.6	1.026		
1994	422	2,545	2.8	1.028		
1995	426	2,567	2.6	1.026		
1996	437	2,635	2.9	1.029		
1997	455	2,741	2.1	1.021		
1998	477	2,875	1.3	1.013		
1999	505	3,043	^a 2.5	1.025		
2000	531	3,202	3.5	1.035		
2001	561	3,381	2.6	1.026		
2002	592	3,567	1.4	1.014		
2003	606	3,653	...	...

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

NOTE: ... = not applicable.

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Glossary

actuarial reduction (OASDI). Reduction in monthly benefit amount payable on—

1. Entitlement prior to full retirement age if the beneficiary is a retired worker, a wife or husband of a retired or disabled worker (with entitlement not based on caring for a child beneficiary), divorced spouse, a widow(er), or a surviving divorced spouse; or
2. Entitlement, in case of disability, at ages 50–59 if the beneficiary is a widow(er), or surviving divorced spouse. (For formulas used to compute the reduction, see "Benefit Types and Levels" in the section Social Security (Old-Age, Survivors, and Disability Insurance).)

administrative law judge—ALJ. An official of the Social Security

Administration's (SSA's) Office of Hearings and Appeals who is specially qualified by education and experience to hold hearings and make independent decisions regarding eligibility for SSA programs based on all the evidence and testimony. ALJs conduct impartial hearings and issue decisions to individuals who have appealed previous determinations by SSA. See also **administrative review process**.

administrative review process (OASDI and SSI). The procedures followed by the Social Security Administration (SSA) in determining one's right under Title II and Title XVI of the Social Security Act. The administrative review process consists of several steps, which must usually be requested within certain time periods, in the following order: initial determination, reconsideration, decision of the administrative law judge, and a review by SSA's Appeals Council.

1. *Initial determination.* A determination SSA makes about an individual's entitlement to benefits or about any other matter that gives that person a right to further administrative and/or judicial review.
2. *Reconsideration.* The first step in the administrative review process. When an individual disagrees with the initial determination, the individual may, within 60 days of receiving notice of the initial determination, ask SSA to reconsider the decision.
3. *Hearing before an administrative law judge (ALJ).* When an individual disagrees with the reconsidered determination, he or she may, within 60 days of receiving notice of the determination, request a hearing before an ALJ.
4. *Appeals Council review.* When an individual disagrees with the decision or dismissal 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 grant the request and either issue a decision or remand (return) the case to an ALJ. The Appeals Council may also review any ALJ action on its own motion within 60 days after the ALJ's action. The Appeals Council's decision or the hearing decision if the Council denies the request for review, represents SSA's final decision in the administrative review process. See **expedited appeals process** and **federal court review**.

adult (SSI). A person older than age 21, aged 18–21 who is not regularly attending school, or a person under 21 who is married or the head of a household.

age (OASDI). In tables showing beneficiaries in current-payment status, the age classification is based on the age of the person at his or her last birthday. In tables showing awards data, age is the beneficiary's age in the month of award or age in year of the award, as specified.

aged beneficiary (OASDI). A person who qualifies for benefits on the basis of age rather than on the basis of caring for a child or disability.

aged enrollee (Medicare). An individual, aged 65 or older, who is enrolled in the Medicare program.

aged person (SSI). A person aged 65 or older.

allowance (DI). A determination that a worker is entitled to a cash disability benefit award or to the establishment of a period of disability because of an inability to work by reason of any physical or mental impairment.

allowed charge (Medicare). An individual charge determined (approved amount) by a carrier for a covered medical service or supply.

annual maximum taxable limit (OASDI and HI). The dollar amount above which earnings in Social Security covered employment is neither taxable nor creditable for benefit computation purposes. (Also referred to as "contribution and benefit base," "annual creditable maximum," "maximum contribution and benefit base," "taxable maximum," and "maximum taxable.") Under the Hospital Insurance program, there is no upper limit on earnings subject to taxes. See Table 2.A3.

assigned claim (Medicare). A claim for which the physician or supplier agrees to accept the amount approved by Medicare as the total payment. The physician or supplier is paid 80 percent of the approved fee schedule (less any unmet deductible). The beneficiary can be charged only for the coinsurance, the remaining 20 percent of the approved amount. A participating physician or supplier agrees to accept assignment on all claims.

auxiliary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.

average. See **mean**.

average indexed monthly earnings—AIME (OASDI). The resulting average monthly earnings of a worker after indexing of actual earnings to reflect the value of the individual's previous earnings relative to national average earnings in the indexing year. A formula is then applied to this figure to compute the primary insurance amount (PIA) for most workers who attain age 62, become disabled, or die after 1978. The indexing year is the second year before the year in which the worker attains age 62, becomes disabled, or dies. Taxable earnings after the indexing year are included at their actual value. For widow(er)'s first eligible after December 1984, the indexing year applicable to the deceased worker's earnings may alternatively be the second year before the widow(er)'s date of eligibility for survivors benefits if it results in a higher benefit.

Earnings are indexed by multiplying the worker's taxable earnings for each year after 1950 through the indexing year by the average wages of all workers for the indexing year, and dividing by the average wages of all workers for the year being indexed. Once the earnings have been indexed, the AIME is computed by—

1. Determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62, becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
2. Selecting the actual computation years, based on highest indexed earnings from any years after 1950; and
3. Dividing the sum of indexed earnings in the computation years by the total number of months in the computation years.

For workers entitled to disability benefits after June 1980, the number of dropout years varies by the age attained in year of disability onset. The number is 0, 1, 2, 3, 4, and 5 for workers aged 26 or younger, 27–31, 32–36, 37–41, 42–46, and 47 or older, respectively. Effective for months after June 1981, however, disabled workers under age 37 may obtain up to 3 additional dropout years (3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for which the worker had no earnings and was living with a child (of the worker or his or her spouse) under age 3.

average monthly wage—AMW (OASDI). The amount of earnings used as the basis for determining the primary insurance amount (PIA) for workers who attained age 62, became disabled, or died before 1979, and also under a transitional guarantee computation for workers who attained age 62 in 1979–1983 or survivors of such workers, if the resulting PIA is higher than under the AIME method. The AMW is computed by—

1. Determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62 (age 65 for men born before January 2, 1911, and the later of age 62 or the year 1975 for men born after January 1, 1911), becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
2. Selecting the actual computation years, based on highest earnings (up to the amount of the annual maximum taxable earnings in each year), from any years after 1950; and
3. Dividing the sum of earnings in the computation years by the total number of months in the computation years.

See the last paragraph under AIME for special dropout rules for disabled workers.

An alternative computation method takes into account the worker's earnings after 1936, if it yields a higher PIA.

award (OASDI). A determination that an individual is entitled to a specified type of benefit. An award action is processed adding the individual to the Social Security benefit rolls maintained for that type of benefit and is counted as an award in a particular month. Award actions are processed not only for new

beneficiaries but also for persons already on the rolls whose benefits in one category are terminated but who become entitled to another type of benefit. These actions are called conversions. When a disabled worker attains the full retirement age, the worker benefit and the benefits of spouses and children are converted to the retirement category. Upon the death of a disabled worker, benefits for children are converted to the survivor child category and benefits for spouses caring for these children are converted to widowed mothers and fathers benefits. Benefits for spouses of retired and disabled workers entitled because of age are converted to nondisabled widows and widowers benefits upon the death of the worker. The above conversions are counted in the award data. The benefits for children of retired workers that are converted to benefits for children of deceased workers upon the death of the worker are not counted in the award data.

base years (OASDI). For computing Social Security benefits, the years after 1950 up to the year a person is entitled to retirement or disability benefits. For a survivor's claim, the base years include the year of the worker's death.

bend points (OASDI). The dollar amounts defining the AIME (average indexed monthly earnings) or PIA (primary insurance amount) brackets in the benefit formulas. See Tables 2.A11 and 2.A13.

beneficiary (OASDI). A person who has been awarded benefits on the basis of his or her own or another's earnings record. The benefits may be either in current-payment status or withheld.

benefit period (Medicare). An alternate name for "spell of illness."

benefit reduction (OASDI). See **actuarial reduction**.

benefit termination (OASDI). See **termination**.

benefits in force (OASDI). The sum of the number of persons with benefits in current-payment status and persons with benefits withheld.

benefits withheld (OASDI). See **withholding**.

blind (OASDI and SSI). "Blindness" for Social Security purposes means either central visual acuity of 20/200 or less in the better eye with the use of a correcting lens, or a limitation in the fields of vision so that the widest diameter of the visual field subtends an angle of 20 degrees or less (tunnel vision).

Black Lung Benefits Program. Provides for monthly payments and medical treatment to coal miners totally disabled from pneumoconiosis (black lung disease) arising from employment in or around the nation's coal mines, augmented payments based on the number of miner's dependents, and payments to certain survivors of miners who died due to or while totally disabled from pneumoconiosis.

buy-in (Medicare). A Medicare beneficiary who is also eligible for Medicaid and for whom Part B (Supplementary Medical Insurance) premiums are paid by a state Medicaid program.

capitation (Medicare). A prospective payment method that pays the provider of service a uniform amount for each person served usually on a monthly basis. Capitation is used in managed care alternatives such as Health Maintenance Organizations.

carrier (Medicare). An entity that the Centers for Medicare & Medicaid Services contracts to process physician/other supplier claims and make payments for Part B (Supplementary Medical Insurance) services.

child (SSI). An unmarried blind or disabled person who is not the head of a household and who is either under age 18 or aged 18–21 and regularly attending school.

childhood disability benefit (OASDI). See **disabled child's benefit**.

child's benefit (OASDI). Monthly benefits payable to children of a retired or disabled worker or of a deceased worker who died either fully or currently insured. Benefits are payable to unmarried children under age 18 (up to age 19 if a full-time student attending elementary or secondary school) and to disabled children aged 18 or older who became disabled before age 22. Under certain circumstances, benefits can be paid to stepchildren, grandchildren, or adopted children. Benefits for disabled children may continue if they marry certain other Social Security beneficiaries.

claimant (OASDI and SSI). The person on whose behalf an application for benefits is filed.

coinsurance (Medicare). See **cost sharing**.

computation starting date (OASDI). December 31 of either 1936 or 1950. Taxable earnings after the applicable starting date are counted in computing average monthly earnings (only starting date of December 31, 1950 is applicable in computing average indexed monthly earnings).

consumer price index—CPI. A relative measure of inflation computed by the U.S. Department of Labor. The CPI charts the rise in costs for selected goods and services and is used to compute cost-of-living increases. In this report, all references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W).

continuing disability review (DI and SSI). A periodic review to determine if a disabled individual is still medically eligible to receive benefits.

contributions (OASDI and Medicare). The amount based on a percentage of earnings, up to an annual maximum, that must be paid by—

1. Employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),
2. The self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and

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3. States on the wages of state and local government employees covered under the Social Security Act through voluntary agreements under section 218 of the Act.

Generally, employers withhold contributions from wages, add an equal amount of contributions, and pay both on a current basis. Also referred to as "taxes." See Table 2.A3.

conversion of benefits (OASDI). See **awards (OASDI)**.

cost-of-living adjustment—COLA. Social Security benefits and Supplemental Security Income payments are increased each year to keep pace with increases in the cost of living (inflation). The consumer price index is used to compute COLA increases.

cost sharing (Medicare). The generic term that includes copayments, coinsurance, and deductibles.

Copayments—Flat fees, typically modest, that insured persons must pay for a particular unit of services, such as an office visit, emergency room visit, or the 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.

couple (SSI). See **eligible couple**.

covered earnings (OASDI). Earnings in employment covered by the OASDI programs.

covered employment (OASDI). All employment and self-employment creditable for Social Security purposes.

covered worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from self-employment.

current-payment status (OASDI). Status of a beneficiary who is paid a benefit for a given month, with or without deductions, provided the deductions add to less than a full month's benefit. The amount shown is prior to deduction for the Medicare Part B (Supplementary Medical Insurance) premium. A benefit in current-payment status at the end of a month is usually payable in the following month.

deductible (Medicare). The amount paid by enrollees for covered services before Medicare makes reimbursements.

Hospital Insurance—Deductible applies to each new benefit period. It is determined each year by a formula specified by law, and approximates the current cost of a 1-day inpatient hospital stay.

Supplementary Medical Insurance—Deductible is the first \$100 of covered charges per calendar year.

deeming (SSI). Takes into account the income and resources of certain persons who live with an SSI recipient when determining the amount of the payment. These persons include the ineligible spouses of adult recipients, the ineligible parents of child recipients under age 18, and the immigration sponsor for certain noncitizens.

delayed retirement credit (OASDI). A credit that increases the benefit amount for certain individuals who did not receive benefits for months after attainment of the full retirement age but before age 70. Delayed retirement credit increases apply for benefits beginning January of the year following the year the individual attains full retirement age.

Each monthly credit serves as a basis for increasing the monthly benefit (unless the benefit is based on a special minimum primary insurance amount) by specified percentages that depend on the year the worker attains age 62. The monthly credit was 1/12 of 1 percent for workers who attained age 62 before 1979 and 1/4 of 1 percent for workers who attained age 62 from 1979 through 1986. The corresponding monthly credits for workers who attain age 62 after 1986 are shown in Table 2.A20. The increase is applicable to the worker's monthly benefit amount but not to his or her PIA, therefore, auxiliary benefits are generally not affected. However, a widow(er)'s benefit may be increased based on the credit that had been applied to the benefit of the deceased worker or for which the worker was eligible at the time of death.

dependents benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker.

diagnosis-related groups (Medicare). A classification system that groups patients according to diagnosis, type of treatment, age, and other relevant criteria. Under the prospective payment system, hospitals are paid a set fee for treatment of patients in a single diagnosis-related groups (DRG) category, regardless of the actual cost of care for the individual.

diagnostic group (OASDI and SSI). Classification of medical conditions, by body system, and identifies the medical condition(s) on which disability-related benefits are based. Prior to 1985, the coding of the primary and secondary diagnoses for OASDI and SSI claimants was in accordance with the *International Classification of Diseases, 9th Revision, Clinical Modification (ICD-9-CM)*, using 4-digit ICD-9 codes. In 1985, the Social Security Administration implemented a revised method to determine and enter impairment codes on administrative records. This revised approach provides for a modified impairment coding system, using three digits (followed by zero), loosely based on ICD-9. For research purposes, ICD-9 codes and SSA impairment codes are, typically, not identical. However, the diagnostic groupings shown in the statistical tables closely parallel the major ICD-9 disease classifications.

direct deposit (OASDI and SSI). A method of payment whereby beneficiaries have their monthly benefits sent electronically to financial institutions they designate. Also referred to as electronic funds transfer (EFT).

disability (DI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. Special rules apply for workers aged 55 or older whose disability is based on blindness.

The law generally requires that a person be disabled continuously for 5 full months before he or she can qualify for a disabled-worker benefit.

disability (SSI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. This 12-month requirement does not apply to the blind.

The SGA criterion does not apply to children under age 18. The standard for them is a medically determinable physical or mental impairment which results in marked and severe functional limitations.

disabled child's benefit (OASDI). A monthly benefit payable to a disabled person aged 18 or older—a son, daughter, or eligible grandchild of retired, deceased, or disabled worker—whose disability began before age 22. (Also referred to as "disabled adult child.")

disabled enrollee (Medicare). A person under age 65 who has been entitled to disability benefits under Title II of the Social Security Act or Railroad Retirement system for at least 2 years.

disabled surviving divorced husband's benefit (OASDI). See **widow(er)'s benefit**.

disabled surviving divorced wife's benefit (OASDI). See **widow(er)'s benefit**.

disabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

disabled-worker benefit (DI). A monthly benefit payable to a disabled worker under full retirement age insured for disability. Before November 1960, disability benefits were limited to disabled workers aged 50–64.

divorced husband's benefit (OASDI). See **husband's benefit**.

divorced wife's benefit (OASDI). See **wife's benefit**.

drug addiction and alcoholism (OASDI and SSI). Legislation enacted in 1996 eliminated drug addiction and alcoholism (DA&A) as a basis for entitlement to Social Security and SSI disability benefits, effective January 1, 1997. Individuals for whom drugs and/or alcohol is deemed a contributing factor material to the determination of disability cannot be entitled to disability benefits.

dual entitlement (OASDI). Entitlement to a worker (primary) benefit and a higher secondary, usually a spouses or widow(er)'s benefit. The primary benefit is paid in full but the secondary benefit is paid only in the amount by which it exceeds the primary benefit. If the two benefits are financed from the same

trust fund, the beneficiary is usually represented only once in the statistics, as a retired-worker or a disabled-worker beneficiary, and the benefit amount recorded is the larger amount associated with the auxiliary benefit. If the benefits are paid from different trust funds the beneficiary is represented twice, and the respective benefit amounts are recorded for each type of benefit.

durable medical equipment (Medicare). Includes certain medical supplies and such items as hospital beds and wheel chairs used in a patient's home.

early retirement (OASDI). Retirement prior to the full retirement age.

earnings (OASDI and Medicare). All wages from employment and net earnings from self-employment, whether or not taxable or covered.

earnings test (OASDI). The provision requiring the withholding of benefits if nondisabled beneficiaries under full retirement age have earnings in excess of certain exempt amounts. See Table 2.A29.

eligible couple (SSI). Two persons living together as married, both of whom are eligible for SSI.

eligible individual (SSI). An aged, blind, or disabled person eligible for SSI.

eligible worker (OASDI). For retirement benefits, an individual who meets the insured status and age requirements for benefits whether or not he or she has filed an application; for Disability Insurance benefits, an individual who meets the insured status requirements and has established a period of disability.

emergency advance payments (SSI). Payments available at initial application for individuals who need cash assistance before their first Supplemental Security Income payment arrives. This advance is withheld from the first check.

end stage renal disease (Medicare). Permanent kidney failure.

entitlement (OASDI). The state of meeting the applicable requirements for receipt of benefits, including the filing of an application. Entitlement can be retroactive and thus precede the date of award. The retroactive period can be 12 months for disabled workers, their spouses and children, and disabled widow(er)s. The maximum retroactive period for other types of benefits is 6 months. Retroactive benefits for months before full retirement age are not payable to a retired worker, a spouse or a widow(er) if a permanent reduction of the monthly benefit amount would result. However, persons filing for a widow(er)'s benefit in the month immediately following the month of the worker's death may elect a 1-month retroactivity, even if reduced benefits would result. A person can be entitled to more than one benefit simultaneously. See **dual entitlement**.

expedited appeals process (OASDI and SSI). This permits an individual to go directly to a federal district court after review of the initial determination without first completing the administrative review process, if the only dispute is

whether an applicable provision of the Social Security Act is constitutional. See **administrative review process**.

family benefit (OASDI). The sum of the individual monthly benefits payable to all the beneficiaries entitled on the basis of a single earnings record. See **maximum family benefit**.

family classification (OASDI). As used in statistical tables, the number and types of beneficiaries entitled to benefits on a single earnings record. Since the family classification is determined by the types of beneficiaries entitled, it can differ from actual family status. For example, a married couple is classified as a worker-and-spouse family if both persons are entitled on the earnings record of one of them. If both persons were entitled on their own earnings record they would be designated as two worker-only families.

father's benefit (OASDI). A monthly benefit payable to a widower or surviving divorced father if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of death and (2) an entitled child of the worker in his care is under age 16 or is disabled.

federal benefit rates (SSI). The basic benefit standards used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. The federal benefit is reduced by one-third, if an individual or couple is living in another person's household and receiving support and maintenance there. The federal benefit rates are increased annually to reflect increases in the cost of living.

federal court review (OASDI and SSI). When an individual disagrees with SSA's final decision he or she may request judicial review by filing a civil action in a federal district court. See **administrative review process**.

federally administered payments (SSI). Federal SSI payments and state supplementation payments issued by the Social Security Administration on behalf of the states.

federally administered state supplementation (SSI). Cash payments provided by a state and issued by the Social Security Administration, which is also responsible for the maintenance of payment records. See **state supplementation**.

Food Stamp Program. The program issues monthly allotments of coupons that are redeemable at retail food stores, or provides benefits through electronic benefit transfer to help individuals and families with little or no income to buy food.

full retirement age—FRA (OASI). The age at which a person may first become entitled to unreduced retirement benefits. For persons attaining age 62 before 2000, the full retirement age is 65. Beginning with an increase to 65 years and 2 months for persons reaching age 65 in 2003, FRA is increasing gradually to 67 for persons reaching that age in 2027 or later. The higher full retirement

age affects the benefit amount if a person chooses to receive reduced benefits. See Table 2.A17.1.

government pension offset (OASDI). A law that affects spouse's or widow(er)'s benefits. Benefits are subject to reduction by any government pensions payable to the spouse on the basis of his or her own earnings in noncovered employment. The offset reduces the Social Security benefit amount by two-thirds of the amount of the government pension.

gross domestic product—GDP. The total dollar value of all goods and services produced by labor and property located in the United States, regardless who supplies the labor or property.

health maintenance organization—HMO (Medicare). Competitive medical plans, including Medicare+Choice, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.

home health agency (Medicare and Medicaid). A public or private organization that provides skilled nursing services and other therapeutic services in the patient's home and that meets certain conditions to ensure the health and safety of the individual.

home health services (Medicare and Medicaid). Items furnished in a patient's home under the care of physicians. These services are furnished under a plan established and periodically reviewed by a physician. They include part-time or intermittent skilled nursing care; physical, occupational, or speech therapy; medical social services; medical supplies and appliances (other than drugs and biologicals); home health aid services; and services of interns and residents.

hospice (Medicare and Medicaid). A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services to patients that are certified to be terminally ill. Medicare beneficiaries may elect to receive hospice care instead of standard Medicare benefits for terminal illnesses.

household (LIHEAP). Any individual or group of individuals who are living together as one economic unit and for whom residential energy is customarily purchased in common, or who make designated payments for energy in the form of rent.

husband's benefit (OASDI). Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See **spouse's benefit**.

independent laboratory services (Medicare). Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.

inpatient hospital services (Medicare). Items and services furnished to an inpatient of a hospital by the hospital, including room and board, nursing and

related services, diagnostic and therapeutic services, and medical or surgical services.

institutionalization (Medicaid and SSI). Living arrangements for persons in public or private institutions when more than 50 percent of the cost of their care is met by the Medicaid program.

insured status (OASDI). The state of having sufficient quarters of coverage to meet the eligibility requirements for retired-worker or disabled-worker benefits or to permit the worker's spouse and children or survivors to establish eligibility for benefits in the event of his or her disability, retirement, or death. (For qualifications for insured status, see "Insured Status" in the section Social Security (Old-Age, Survivors, and Disability Insurance.))

interim assistance (SSI). Payments made by a state or local government to Supplemental Security Income applicants while their claims are being adjudicated. Repayment is made from the first SSI payment.

intermediary (Medicare). An organization, selected by providers of health care, that has an agreement with the Centers for Medicare & Medicaid Services to process and pay institutional claims and perform other functions under the program.

life expectancy. The average number of years of life remaining at each tabulated birthday. See **life table (period)**.

life table (period). A period life table represents the mortality experience of an entire population during a relatively short period of time, usually 1–3 years. Such tables are useful for analyzing changes in the mortality experienced by a population through time. The table refers to a cohort of 100,000 people with the same birthday who experience the rate of mortality, or probability of death within 1 year, shown in the table, throughout their lives.

lifetime reserve (Medicare). Nonrenewable 60 days of inpatient hospital care to draw on if the 90 covered days per benefit period are exhausted. Patients are required to pay a daily coinsurance amount equal to one-half of the inpatient hospital deductible for each lifetime reserve day.

limitation of widow(er)'s benefit (OASDI). The reduction of the widow(er)'s benefit due to the early retirement of the deceased spouse. The benefit for a nondisabled widow(er) is limited to the larger of 82 1/2 percent of the deceased spouse's primary insurance amount, or the amount to which the deceased spouse would have been entitled if he or she were still alive. Thus, receipt of benefits by a worker before the full retirement age will result in a reduction of benefits for a widow(er), even if the widow(er) became entitled after his or her own full retirement age. Tables showing data on reduction for early retirement for nondisabled widow(er)s do not include those with limited benefits unless they became entitled before their own full retirement age. See **widow(er)'s benefit**.

Low-Income Home Energy Assistance Program—LIHEAP. Federal program to assist low-income households with heating and cooling costs.

low-income households (LIHEAP). Households with income under the greater of 150 percent of the poverty guideline for their state or 60 percent of the state median income, or households with members receiving Temporary Assistance for Needy Families, Supplemental Security Income, Food Stamps, or certain needs-tested veterans' benefits.

lump-sum death benefit (OASDI). A one-time payment, generally \$255, payable on the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances, or if there is no spouse, to the worker's entitled children.

managed care (Medicare). Includes health maintenance organizations (HMOs), competitive medical plans (CMPs), and other plans that provide health services on a prepayment basis which is either based on cost or risk depending on the type of contract they have with Medicare. See also **Medicare+Choice**.

mandatory minimum state supplementation (SSI). Required by federal law for individuals converted to the Supplemental Security Income program from state assistance programs for the aged, blind, or disabled. This provision insures that monthly income will not be less than the amount received under the former state programs.

maximum family benefit (OASDI). The maximum monthly amount that can be paid on a worker's earnings record. Whenever the total of the individual monthly benefits payable to all the beneficiaries entitled on one earnings record exceeds the maximum, each dependents or survivors benefit is proportionately reduced to bring the total within the maximum. Benefits payable to divorced spouses or surviving divorced spouses are not reduced under the family maximum provision. Tables 2.A13, 2.A14, and 2.A17 give the formulas for computing the maximum family benefit.

maximum taxable (OASDI and Medicare). See **annual maximum taxable limit**.

mean. The arithmetic mean is calculated by dividing the sum of all of the values of a variable by the number of cases. The term "average" used in this publication refers to the arithmetic mean. See also **median**.

median. The median is a measure of central value which identifies that value that divides a distribution in half such that an equal number of cases fall below it as there are above it. See also **mean**.

Medicaid. A federal-state program that provides medical assistance for certain individuals and families with low incomes and limited resources.

medical savings account (Medicare). A plan that provides benefits after a single high deductible is met. Medicare makes an annual deposit to the medical savings account (MSA) and the beneficiary is expected to use that

money to pay for medical expenses below the annual deductible. MSAs are currently a test program.

medically needy (Medicaid). Persons who would be eligible for Medicaid under one of the program's mandatory or optional groups, except that their income or resources are above the eligibility level set by their state. The states may extend eligibility to these otherwise qualified persons by allowing them to "spend down" to Medicaid eligibility by incurring medical or remedial care expenses to offset their excess income, thereby reducing it to a level below the maximum allowed by that state's Medicaid plan.

Medicare. A federally administered health insurance program that covers the cost of hospitalization, medical care, and some related services for most persons aged 65 or older. Also covers persons receiving Social Security Disability Insurance payments for 2 years, and persons with end stage renal disease. Medicare consists of two separate but coordinated programs—Part A (Hospital Insurance) and Part B (Supplementary Medical Insurance).

Medicare+Choice. An expanded set of options for the delivery of health care under Medicare established by the Balanced Budget Act of 1997. Most Medicare beneficiaries can choose to receive benefits through the original fee-for-service program or through one of the following Medicare+Choice plans: (1) coordinated care plans (such as health maintenance organizations, provider sponsored organizations, and preferred provider organizations); (2) medical savings account/deductible plans (through a demonstration available to up to 390,000 beneficiaries); or (3) private fee-for-service plans.

Medicare economic index. An index that is often used in the calculation of the increases in the prevailing charge levels that help to determine allowed charges for physician services. In 1991 and later, this index is considered in connection with the update factor for the physician fee schedule.

Medigap (Medicare). A term used for private health insurance that pays, within limits, most of the health care service charges not covered by Part A (Hospital Insurance) or Part B (Supplementary Medical Insurance).

military wage credits (OASDI and Medicare). Credits recognizing that military personnel receive wages in kind (such as food and shelter) in addition to their basic pay and other cash payments. Noncontributory wage credits of \$160 are provided for each month of active military service from September 16, 1940, through December 31, 1956. For years after 1956, the basic pay of military personnel is covered under the Social Security program on a contributory basis. See Table 2.A2 for amounts of noncontributory wage credits for 1957–2001. Noncontributory wage credits were eliminated for all years after 2001.

minimum benefit (OASDI). The lowest benefit (before actuarial reduction) payable to a retired worker, a disabled worker, or a sole survivor of a deceased worker. The minimum benefit was eliminated for most workers who attain age 62, become disabled, or die after 1981.

monthly benefit (OASDI). The amount payable after reduction, if necessary, for age, family maximum, and other reasons but before any deduction for

supplementary medical insurance (SMI) premiums. Effective June 1982, the final benefit payment is rounded to the next lowest \$1 (if not already a multiple of \$1) after reduction for age, family maximum, and other reasons and after any deduction for SMI premiums. The tables in this publication reflect the monthly benefit credited (MBC) which is calculated as follows:

1. Subtract the SMI premium from the monthly benefit amount;
2. Round the above result down to the nearest whole dollar; and
3. Add back the SMI premium to the rounded result from 2 above.

For example, if a monthly benefit amount is \$895.00, and an SMI premium of \$58.70 is deducted, the MBC is \$894.70 (calculated as follows: $\$895.00 - \$58.70 = \$836.30$ rounded down to $\$836.00 + \$58.70 = \$894.70$).

mother's benefit (OASDI). A monthly benefit payable to a widow or surviving divorced mother if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of his death and (2) the entitled child of the worker is in her care and is under age 16 or disabled.

nondisabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

nonpayment status (OASDI). See **withholding**.

normal retirement age (OASI). See **full retirement age**.

old-age benefit (OASI). See **retired-worker benefit**.

Old-Age, Survivors, and Disability Insurance—OASDI. The Social Security programs that pay monthly cash benefits to:

1. Retired worker (old-age) beneficiaries and their spouses and children and to survivors of deceased insured workers (OASI), and
2. Disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled (DI).

optional state supplementation (SSI). May be provided by states to bring the combined Supplemental Security Income and state payment to an amount more nearly commensurate with their costs of living than is the SSI payment alone.

outpatient services (Medicare). Services furnished to outpatients by a participating hospital for diagnosis or treatment of an illness or injury.

own household (SSI). A definition used to determine the federal benefit rates. Applies to adults who own their living quarters, are liable for the rent, pay their pro rata shares of household expenses, are living in households composed only of recipients of public income-maintenance payments, are placed by agencies in private households, and children living in their parent's household. See **federal benefit rates**.

parent's benefit (OASDI). Monthly benefit payable to a dependent parent aged 62 or older of a deceased fully insured worker.

payment status (OASDI). The state or condition of a benefit with respect to actual receipt by the beneficiary—that is, whether the benefit is in current-payment status or withheld.

peer review organization (Medicare). A group of practicing physicians and other health care professionals, paid by the federal government, to review the care given to Medicare patients.

physician services (Medicare). Services provided by an individual licensed under state law to practice medicine or osteopathy. Services provided by hospitals are not covered by this provision.

preferred provider organization (Medicare). An arrangement between a provider network and a health insurance or a self-insured employer. Providers generally accept payments less than traditional fee for service payments in return for a potentially greater share of the patient market. Preferred provider organization enrollees are not required to use the preferred providers, but are given financial incentives to do so, such as reduced coinsurance and deductibles. Providers do not accept financial risk for the management of care.

presumptive disability or blindness (SSI). For certain diagnoses, where there is high probability of a favorable medical determination of disability or blindness, payments may be made for up to 6 months before the formal determination if the applicant meets the other eligibility qualifications.

primary insurance amount—PIA (OASDI). The primary insurance amount is related to a worker's average monthly wage or average indexed monthly earnings. The PIA is used to compute all types of benefits payable on the basis of an individual's earnings record. Retired workers electing benefits at the full retirement age and disabled workers who did not receive a retirement benefit reduced for age receive a benefit equal to the PIA. Dependents and survivors of workers receive specified percentages of the PIA subject to the family maximum and entitlement before the full retirement age.

primary insurance amount formula (OASDI). The mathematical formula relating the primary insurance amount (PIA) to the AIME (average indexed monthly earnings) for workers who attain age 62, become disabled, or die after 1978. The PIA is equal to the sum of 90 percent of AIME up to the first bend point, plus 32 percent of AIME above the first bend point up to the second bend point, plus 15 percent of AIME in excess of the second bend point. Automatic benefit increases are applied beginning with the year of eligibility.

prospective payment system (Medicare). A method of reimbursement for hospitals that was implemented effective with hospital cost reporting periods beginning on or after October 1, 1983. Under this system, Medicare payment is made at a predetermined, specific rate for each discharge. All discharges are classified according to a list of diagnosis-related groups.

Prouty benefit (OASI). See **special age-72 benefit**.

provider (Medicare and Medicaid). *Medicare*—A provider is a facility, supplier, or physician who furnishes medical services. *Medicaid*—A provider is a person, group, or agency who provides covered services to enrollees.

Qualified Medicare Beneficiaries (Medicare and Medicaid). Qualified Medicare Beneficiaries are persons with incomes at or below 100 percent of the federal poverty level and resources at or below 200 percent of the Supplemental Security Income limit. Medicaid pays the Medicare (Parts A and B) premiums and the coinsurance and deductibles, subject to limits that states may impose on payment rates.

quarters of coverage (OASDI and Medicare). The crediting of coverage needed for insured status. A worker receives 1 quarter of coverage (up to a total of 4) for a designated amount of annual earnings reported from employment or self-employment. This dollar amount is subject to annual automatic increases in proportion to increases in average earnings. For amounts in years 1939 to present, see Table 2.A7. No more than 4 quarters of coverage may be credited for any calendar year, and no quarter of coverage is credited after the quarter in which death occurred or for a quarter entirely included in a period of disability.

Railroad Retirement. A federal insurance program designed for workers in the railroad industry. The provisions of the Railroad Retirement Act provide for a system of coordination and financial interchange between the Railroad Retirement program and the Social Security program.

reasonable cost (Medicare). Intermediaries and carriers use the Centers for Medicare & Medicaid Services guidelines to determine reasonable costs incurred by providers in furnishing covered services to enrollees. Reasonable cost is based on the actual cost of providing such services, including direct and indirect costs of providers and excluding any costs that are unnecessary in the efficient delivery of services covered by the Hospital Insurance program.

redetermination (SSI). The periodic review of eligibility for each Supplemental Security Income recipient to ensure that eligibility continues and that payments are in the proper amount.

reduction for early retirement (OASDI). See **actuarial reduction**.

representative payee (OASDI and SSI). A person designated by the Social Security Administration to receive monthly benefits on behalf of a beneficiary when such action appears to be in the beneficiary's best interest. A representative payee is appointed for an adult beneficiary when the beneficiary is physically or mentally incapable of managing his or her own funds. In addition, a payee is usually appointed to receive benefits on behalf of a child under age 18.

retired-worker (old-age) benefit (OASI). Monthly benefit payable to a fully insured retired worker aged 62 or older, or to a person entitled under the transitionally insured status provision in the law. Retired-worker benefit data do not include special age-72 benefits, unless indicated.

retirement age (OASI). The age at which an individual establishes entitlement to retirement benefits. See **full retirement age**.

retirement earnings test (OASDI). See **earnings test**.

secondary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.

Section 1619(a) (SSI). See **special cash payments**.

Section 1619(b) (SSI). See **special recipient status**.

self-employed (OASDI and HI). One who derives income from the operation of a partnership or nonincorporated trade or business.

skilled nursing facility (Medicare). An institution that has a transfer agreement with one or more participating hospitals, is primarily engaged in providing skilled nursing care and rehabilitative services to inpatients, and meets specific regulatory certification requirements.

Social Security number (OASDI and HI). A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security and Medicare.

Social Security Act. Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 20 titles, of which four have been repealed.

special age-72 benefit (OASI). Monthly benefit payable to men who attained age 72 before 1972 and to women who attained age 72 before 1970 and who do not have sufficient quarters of coverage to qualify for a retired-worker benefit under either the fully or the transitionally insured status provisions. (Also known as Prouty benefits.)

special cash payments (SSI). Continuing cash benefits for disabled individuals whose gross earned income is at the amount designated as the substantial gainful activity level. The person must continue to be disabled and meet all other eligibility rules.

special minimum PIA (OASDI). An alternative primary insurance amount (PIA) based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See Table 2.A12 for computation of the special minimum PIA.

special recipient status (SSI). For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.

Specified Low-Income Medicare Beneficiaries (Medicare and Medicaid). Persons who meet all Qualified Medicare Beneficiary requirements except that their incomes are slightly higher, though less than 120 percent of the

federal poverty level. Medicaid pays their Part B (Supplementary Medical Insurance) premium.

spell of illness (Medicare). A period of consecutive days beginning with the first day on which a beneficiary is furnished inpatient hospital or extended care services and ending with the close of the first period of 60 consecutive days thereafter in which the beneficiary is in neither a hospital or skilled nursing facility.

spouse's benefit (OASDI). Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions:

1. The spouse is aged 62 or older or has an entitled child of the worker in his or her care who is under age 16 or is disabled; or
2. The divorced spouse is aged 62 or older and was married to the worker for 10 years before the divorce became final. Effective with benefits payable after December 1984, a divorced spouse of an eligible worker can be entitled to benefits if he or she meets the requirements for entitlement and has been divorced for at least 2 years, regardless of whether the worker has filed for benefits or has benefits withheld due to the earnings test. Effective with benefits payable beginning January 1991, the 2-year period is waived if the worker was entitled to benefits before the divorce. The earnings test will continue to apply to the divorced spouse's own earnings; or
3. Effective with benefits payable beginning January 1991, a deemed spouse (including a divorced deemed) spouse), regardless of whether the legal spouse is entitled to benefits on the same earnings record. A deemed spouse is a person who entered into an invalid ceremonial marriage in good faith.

state-administered supplementation (SSI). See **state supplementation**.

state supplementation (SSI). Payments to eligible persons made under state provisions. These payments may vary by the recipient's living situation and by geographic area within the state. The payments are federally and state administered.

student benefit (OASDI). Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student benefits end at age 19 or at the end of the current semester or quarter, whichever is later.

substantial gainful activity—SGA (DI and SSI). Remunerative work that is substantial, as determined from considering the amount of money earned, and or the number of hours worked, and the nature of the work. See Table 2.A30 for money amounts.

Supplemental Security Income—SSI. Program for the needy aged, blind, and disabled. Replaced the former federal-state programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled.

surviving divorced father's benefit (OASI). See **father's benefit**.

surviving divorced mother's benefit (OASI). See **mother's benefit**.

surviving divorced spouse's benefit (OASI). See **widow(er)'s benefit**.

survivors benefit (OASI). Benefit payable to a survivor of a deceased insured worker.

suspended benefit (OASDI). A benefit not in current-payment status.

taxable earnings (OASDI and HI). Wages and/or self-employment income that is under the applicable annual maximum taxable limit.

taxable maximum (OASDI and HI). See **annual maximum taxable limit**.

taxable self-employment income (OASDI and HI). The maximum amount of net earnings from self-employment by an earner which, when added to any taxable wages, does not exceed the contribution and benefit base. For Hospital Insurance beginning in 1994, all net earnings from self-employment.

taxable wages (OASDI and HI). See **taxable earnings**.

taxes (OASDI and HI). See **contributions**.

technical entitlement. A technical entitlement occurs when a beneficiary is entitled to benefits on more than one earnings record but is eligible to receive benefits on only one earnings record. There are two types of technical entitlement: (1) Simultaneous technical entitlement: beneficiary is entitled to the same type of benefit on more than one earnings record; (2) Potential dual entitlement: the secondary benefit amount potentially exceeds the primary benefit, but reduction for age or family maximum causes the primary benefit to exceed the secondary benefit amount.

Temporary Assistance for Needy Families—TANF. Created by the Personal Responsibility and Work Opportunities Reconciliation Act of 1996, TANF provides assistance and work opportunities to needy families. Replaced Aid to Families with Dependent Children (AFDC), Emergency Assistance, and Job Opportunities and Basic Skills Training (JOBS) programs.

Temporary Disability Insurance—TDI. Sometimes called cash sickness benefits, TDI provides workers with partial compensation for loss of wages caused by temporary nonoccupational disability. Only five states, Puerto Rico, and the railroad industry have TDI laws.

termination (OASDI). Cessation of payment of a specific type of benefit because the beneficiary is no longer entitled to receive it. For example, benefits might terminate as a result of the death of the beneficiary, the recovery of a disabled beneficiary, or the attainment of age 18 by a child beneficiary. In some cases, the individual may become immediately entitled to another type of benefit (such as the conversion of a disabled-worker beneficiary at full retirement age to a retired-worker beneficiary).

totalization (OASDI). International agreements that coordinate the U.S. Social Security programs with the Social Security programs of other countries are called "totalization agreements."

Thrifty Food Plan (Food Stamp Program). A low-cost model diet plan based on the National Academy of Sciences' Recommended Dietary Allowances. Households are issued a monthly allotment of food stamps based on the Thrifty Food Plan.

trust fund (OASDI and Medicare). Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage of state and local government employees, any sums received under the financial interchange with the railroad retirement account, voluntary hospital and medical insurance premiums, and transfers of federal general revenues. Funds not withdrawn for current monthly or service benefits, the financial interchange, and administrative expenses are invested in interest-bearing federal securities, as required by law.

The interest earned is also deposited in the trust funds.

1. Old-Age and Survivors Insurance (OASI). The trust fund used for paying monthly benefits to retired-worker (old-age) beneficiaries and their spouses and children and to survivors of insured workers.
2. Disability Insurance (DI). The trust fund used for paying monthly benefits to disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled.
3. Hospital Insurance (HI). The trust fund used for paying part of the costs of inpatient hospital services and related post-hospital care for aged and disabled individuals who meet the eligibility requirements.
4. Supplementary Medical Insurance (SMI). The trust fund used for paying part of the costs of physicians' services, outpatient hospital services, and other related medical and health services for voluntarily insured aged and disabled individuals.

Unemployment Insurance. A federal-state coordinated program that provides partial income replacement to regularly employed members of the labor force who become involuntarily unemployed. All 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands have unemployment insurance programs.

veterans' benefits. A variety of benefits and services to veterans and their dependents and survivors that include, but are not limited to disability compensation, benefits for survivors, health care benefits, and educational assistance and training.

widowed father's benefit (OASI). See **father's benefit**.

widowed mother's benefit (OASI). See **mother's benefit**.

widow(er)'s benefit (OASDI). Monthly benefit payable to a widow(er) or surviving divorced widow(er) of a worker fully insured at the time of death, if he

or she is (1) aged 60 or older or (2) aged 50–59 and has been disabled throughout a waiting period of 5 consecutive calendar months that began no later than 7 years after the month in which the worker died or after the end of his or her entitlement to benefits as a widowed mother or father.

A surviving divorced widow(er)'s marriage to a worker must have lasted 10 years before the divorce became final. Effective for benefits payable after December 1983, benefits are continued for disabled widow(er)s and surviving divorced widow(er)'s who remarry after the age of first eligibility for benefits.

Effective January 1991, benefits may be payable to a deemed widow(er), including a divorced deemed widow(er). A deemed widow(er) is a person who entered into an invalid ceremonial marriage in good faith.

wife's benefit (OASDI). A monthly benefit payable to a wife or divorced wife of a retired or disabled worker. See **spouse's benefit**.

windfall elimination provision—WEP (OASI and DI). A modified benefit formula for determining the primary insurance amount, which eliminates the windfall in benefits for individuals who have only minimal Social Security coverage and will receive a pension based on years of work in noncovered employment. This formula prevents a windfall to persons who unfairly benefit from provisions aimed at low-income workers. The change was phased in for workers eligible for retirement or Disability Insurance benefits and for a pension from noncovered employment beginning in 1986; became fully effective in 1990. See Table 2.A11.1

withholding (OASDI). Suspension of benefit payments until the condition(s) causing deductions are known to have ended. The suspension does not affect eligibility for Hospital Insurance benefits.

worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from covered self-employment. Data on covered self-employment exclude self-employed persons who had no self-employment income taxable or creditable under Social Security because they had wages or salaries reaching the annual taxable maximum reported for the same year.

workers' compensation and public disability benefit offset (DI). A requirement that reduces the benefits to a disabled worker and dependents if the worker also receives workers' compensation (WC) or other public disability benefits (PDB). The reduction continues until the month the worker reaches age 65 or the month the WC/PDB payments stop, whichever comes first.

Abbreviations

AB	Aid to the Blind
ACF	Administration for Children and Families
AET	Annual earnings test
AFDC	Aid to Families with Dependent Children
AFDC-UP	Aid to Families with Dependent Children-Unemployed Parents
AIDS	Acquired immune deficiency syndrome
AIME	Average indexed monthly earnings
AMW	Average monthly wage
APTD	Aid to the Permanently and Totally Disabled
BBA	Balanced Budget Act of 1997
BC/BS	Blue Cross/Blue Shield
CDR	Continuing disability review
CHAMPVA	Civilian Health and Medical Program of the Department of Veterans Affairs
CLIA	Clinical Laboratory Improvement Act
CMP	Competitive medical plans
CMS	Centers for Medicare & Medicaid Services
COBRA	Consolidated Omnibus Budget Reconciliation Act
COLA	Cost-of-living adjustment
CPI-U	Consumer price index for all urban consumers
CPI-W	Consumer price index for urban wage earners and clerical workers
CPS	Current Population Survey
DA&A	Drug addiction and alcoholism
DI	Disability Insurance
DME	Durable medical equipment
DOE	Department of Energy
DOL	Department of Labor
DRG	Diagnosis-related group
EA	Emergency Assistance
EBT	Electronic benefit transfer
EPSDT	Early and Periodic Screening, Diagnostic, and Treatment program
ESRD	End stage renal disease
FERS	Federal Employees Retirement System

FFS	Fee for service
FICA	Federal Insurance Contributions Act
FMAP	Federal medical assistance percentage
FPL	Federal poverty level
FQHC	Federally qualified health center
FRA	Full retirement age
FUTA	Federal Unemployment Tax Act
FY	Fiscal year
GDP	Gross domestic product
HCBS	Home and community based services
HCFA	Health Care Financing Administration
HHA	Home health agency
HHS	Department of Health and Human Services
HI	Hospital Insurance
HIV	Human immunodeficiency virus
HMO	Health maintenance organization
ICF	Intermediate care facility
ICFs/MR	Intermediate care facilities for the mentally retarded
JOBS	Job Opportunities and Basic Skills Training
LIHEAP	Low-Income Home Energy Assistance Program
LTC	Long-term care
MBC	Monthly benefit credited
MBR	Master Beneficiary Record
MCCA	Medicare Catastrophic Coverage Act
MCCRA	Medicare Catastrophic Coverage Repeal Act
MN	Medically needy
MOE	Maintenance of effort
MSA	Medical savings account
NEW	Native Employment Works
NRC	National Research Council
OAA	Old-Age Assistance
OASDI	Old-Age, Survivors, and Disability Insurance
OASI	Old-Age and Survivors Insurance
OBRA	Omnibus Budget Reconciliation Act
OEO	Office of Economic Opportunity

OMB	Office of Management and Budget
PACE	Programs of all-inclusive care for the elderly
PESS	Property essential to self-support
PIA	Primary insurance amount
PIB	Primary insurance benefit
PPO	Preferred provider organization
PPS	Prospective payment system
PRO	Peer review organization
PSO	Provider-sponsored organization
QC	Quarter of coverage
QDWIS	Qualified disabled working individuals
QI	Qualified individual
QMB	Qualified Medicare beneficiary
REACH	Residential Emergency Assistance Challenge
RVS	Relative value scale
SCHIP	State Children's Health Insurance Program
SECA	Self-Employment Contributions Act
SGA	Substantial gainful activity
SIPP	Survey of Income and Program Participation
SLMB	Specified low-income Medicare beneficiary
SMI	Supplementary Medical Insurance
SNF	Skilled nursing facility
SSA	Social Security Administration
SSI	Supplemental Security Income
TANF	Temporary Assistance for Needy Families
TEFRA	Tax Equity and Fiscal Responsibility Act
TFP	Thrifty Food Plan
TWP	Trial work period
USDA	Department of Agriculture
VA	Department of Veterans Affairs
VEAP	Veterans' Educational Assistance Program
WEP	Windfall Elimination Provision
WIN	Work Incentive Program

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