

# Payment Integrity Scorecard

**Program or Activity**  
Old-Age and Survivors Insurance (OASI)

**Reporting Period**  
Q2 2026

**FY 2025 Overpayment Amount (\$M)\*** **\$1,147**

\*Estimate based a sampling time frame starting 10/2023 and ending 9/2024

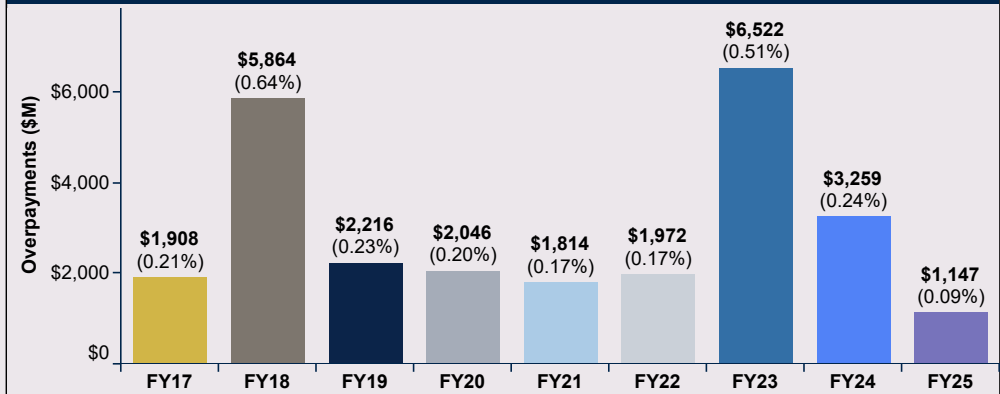


**SSA**  
Old-Age and Survivors Insurance (OASI)

**Brief Program Description & summary of overpayment causes and barriers to prevention:**

The OASI program provides monthly benefits to eligible retirees, their dependents, and surviving dependents of deceased workers. Overpayments (OP) within our control occur when the beneficiary, representative payee, or third-party provided the necessary information, but we failed to use the information needed to accurately compute the benefit amount prior to making a payment. OPs outside of the agency's control occur when we are unable to access data needed to validate payment accuracy because the beneficiary, representative payee, or a third-party did not provide the requested information, provided the information after the benefit amount was calculated/processed, or provided inaccurate information to compute the accurate benefit amount.

**Historical Payment Rate and Amount (\$M)**  
**(Overpayment as Percentage of Total Outlays)**



**Discussion of Actions Taken in the Preceding Quarter and Actions Planned in the Following Quarter to Prevent Overpayments**

We are investing in information technology to provide our employees with user-friendly systems and tools to better serve the public. We continue development of the Consolidated Claims Experience (CCE), a modernized user-friendly web-based application designed to centralize and streamline benefit claim processing actions, reduce training time for technicians, and provide a more intuitive approach for data collection and processing of benefit claims. CCE is a multi-year effort that will employ enhanced computation utilities that minimize manual tasks and help technicians identify entitlement and eligibility for beneficiaries. In Quarter (Q1), we released Lump Sum Death Payment (LSDP) applications in CCE nationally. In March 2026, we further improved CCE by enabling the automated processing of Medicare claims, reducing technician involvement and flagging specific issues for review. We are committed to meeting people where they want to be served. The Upload Documents tool has enabled customers to electronically sign, upload, and submit select forms and evidence from their personal devices, streamlining the submission process. In Q1, we enhanced this tool by expanding access to individual representative payees (IRP), allowing them to use their "my Social Security" account to electronically submit forms and evidence on behalf of beneficiaries. This enhancement empowers IRPs to upload documents at any time, further improving efficiency and service for our customers.

**Accomplishments in Reducing Overpayment**

**Date**

1	National launch of three applications in the web-based platform that modernized the initial claims intake system and will enhance backend processing capabilities. This release supports the agency's ongoing efforts to update and improve our legacy systems.	Sep-25
2	Enhanced our Upload Documents tool to allow IRPs access to submit forms and evidence electronically for recipients, enabling faster self-initiated uploads and eliminating delays waiting for technician outreach.	Dec-25
3	In FY 2026 Q2, as part of our debt collection program for OASI, we collected \$43.7 million (M) via the Treasury Offset Program (TOP, FYTD about \$44.6M), about \$11.1M in overpayments via Pay.gov (FYTD about \$21.1M), and \$0.6M via Online Bill Pay (FYTD \$1M).	Mar-26

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<b>Program or Activity</b> Old-Age and Survivors Insurance (OASI)
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<b>Reporting Period</b> Q2 2026
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Goals towards Reducing Overpayments	Status	ECD	Recovery Method	Brief Description of Plans to Recover Overpayments	Brief Description of Actions Taken to Recover Overpayments
<b>1</b> We plan to continue making enhancements to the 21st Century PolicyNet (21CPN). The overall goals of 21CPN are an improved user experience, process efficiencies and improved searching capabilities. For example, we plan to launch a generative Policy Assistant Tool (PAT) designed to simplify the search process for policies, procedures, and instructions. This tool will assist technicians in quickly and accurately finding and understanding relevant information to aid in decision-making.	On-Track	Sep-26	<b>1 Recovery Activity</b>	Resume regular mailing of pre-offset notices and referrals to TOP.	We resumed regular mailing of pre-offset notices and referrals to TOP.
			<b>2 Recovery Activity</b>	Partner with Fiscal Service to move debts to Centralized Receivables Service (CRS) and develop a plan for misuse overpayments by instituting regular follow-up with organizational representative payees.	We are reviewing our policy to align with the transition to electronic remittances. We initiated a pilot for CRS and are receiving collections. We drafted a plan to streamline organizational representative payee overpayment recovery and coordinating debt collection options.
<b>2</b> We are actively working with Treasury, "Do Not Pay (DNP) to assess our onboarding and compliance for all benefit and administrative payments. We have signed the agency's Standard Agreement and are currently working on finalizing the Program Access List. In parallel, testing of the file transfer connection is underway. The agency has all payments in soft launch and are actively working with Treasury to document the business rules necessary to move each type of payment to production.	On-Track	Sep-26	<b>3 Recovery Activity</b>	Expand the availability of our electronic payment options to all overpayment notices (e.g., Recovery of Overpayments, Accounting, and Reporting (ROAR), and Title II Redesign).	We implemented electronic payments options on ROAR notices.

Amt(\$)	Root Cause of Overpayment	Root Cause Description	Mitigation Strategy	Brief Description of Mitigation Strategy and Anticipated Impact
\$1,080M	Overpayments that occurred because of a Failure to Access Data/Information Needed.	The root cause of overpayments within the agency's control is failure to access information needed to make accurate payments. We have the information needed to compute the benefit amount accurately, but failed to use it to validate payment accuracy prior to making a payment.	Automation - automatically controlled operation, process, or system.	IPs can result from incorrect policy interpretation and application, mathematical or typographical errors, or delay in input. Planned enhancements to 21CPN include the launch of the PAT, which is designed to simplify policy searches, procedures, and instructions.
\$67M	Overpayments that occurred because of an Inability to Access the Data/Information Needed.	The root cause of overpayments outside the agency's control is an inability to access data/information needed. The beneficiary or a third party either did not provide requested information necessary to compute the benefit amount or provided inaccurate information.	Cross Enterprise Sharing - sharing of documents, processes, and opportunities with intra-agency partners and stakeholder. Potentially managed through federated repositories and a registry to create a longitudinal connection to information used to mitigate Improper Payments.	Treasury's DNP provides Federal agencies and federally funded state-administrated programs access to data and services to verify recipient identity and eligibility before making a payment, helping to ensure payment accuracy.

We issue over \$1 trillion in OASI benefit payments each year while maintaining a high rate of OASI payment accuracy and we are dedicated to ongoing improvement. As responsible stewards of our programs and in compliance with legal requirements, we conduct quality reviews, and payment accuracy initiatives to ensure individuals receive the benefits for which they are eligible. We continually review and enhance our internal policies and procedures to improve efficiency and expand customer access to our services. Our goal is to significantly reduce payment errors through automation, business process improvements, policy updates, data sharing, staff training, and targeted outreach.