# Payment Integrity Scorecard

**Program or Activity**
Disability Insurance (DI)

**Reporting Period**
Q3 2026

**FY 2025 Overpayment Amount ($M)*** **$1,832**

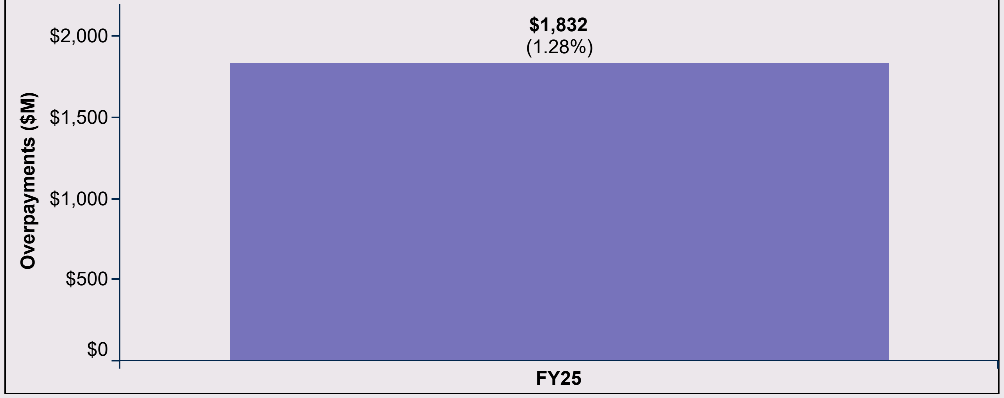
*Estimate based a sampling time frame starting 10/2023 and ending 9/2024

**SSA**
Disability Insurance (DI)

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

The DI program provides monthly benefits for workers who become disabled and their eligible family members. 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. To reduce our reliance on beneficiary and representative payee reporting of employment and wage information, we now use the Payroll Information Exchange (PIE). Using PIE, we obtain wage and employment information from a commercial payroll data provider (PDP) for individuals who have provided authorization and work for participating employers. We plan to implement several key enhancements, including the ability to request historical wage data, a process for handling SSNs flagged for name mismatch, and displaying wage and employment information for beneficiaries to provide greater transparency into their wages reported through PIE. In an effort to modernize how employees access policy guidance, we released the 21st Century PolicyNet (21CPN) in 2024. The new platform replaced PolicyNet, a more than 20-year-old software platform that hosted multiple applications and tens of thousands of pages of policy instructions. We continue development and refinement of 21CPN to expand functionality and improve user experience. We launched the Policy Assistant Tool (PAT), which is a chatbot developed to support policy navigation and operational efficiency including reducing improper payments. The tool aims to reduce research time, improve customer service, and optimize internal resources. PAT's enterprise-wide release via the 21CPN platform occurred in May 2026.

| | Accomplishments in Reducing Overpayment | Date |
|---|---|---|
| 1 | Enterprise-wide release of PAT via the 21CPN platform. PAT aims to reduce research time, improve customer service, and optimize internal resources. | May-26 |
| 2 | Made updates to our policy on child relationship and dependency, including an update to the evidence requirements for developing illegitimacy. Added a chart of State laws to our policy to assist technicians in determining State requirements for certain paternity situations. | Jun-26 |
| 3 | In FY 2026 Q3, as part of our debt collection program for DI, we collected about $88.1 million (M) via the Treasury Offset Program (TOP, FYTD $268.4M), $17.6M in OPs via Pay.gov (FYTD about $49.6M), and about $1.1M via Online Bill Pay (FYTD $2.8M). | Jun-26 |

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Disability Insurance (DI)

**Reporting Period**
Q3 2026

| | Goals towards Reducing Overpayments | Status | ECD |
|---|---|---|---|
| 1 | We are actively working with Treasury's 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 |
| 2 | Our goal is to implement activities in support of PIE. We plan to implement several key enhancements, including the ability to request historical wage data, a process for handling SSNs flagged for name mismatch, and displaying wage and employment information for beneficiaries to provide greater transparency into their wages reported through PIE. Additionally, we will develop more robust management information to enable more detailed analysis and guide further improvements to address pain points. | On-Track | Sep-26 |

| | Recovery Method | Brief Description of Plans to Recover Overpayments | Brief Description of Actions Taken to Recover Overpayments |
|---|---|---|---|
| 1 | **Recovery Activity** | Continue the regular mailing of pre-offset notices and referrals to TOP. | Maintained regular operations by ensuring that pre-offset notices and referrals to TOP continued as part of our standard debt recovery process. |
| 2 | **Recovery Activity** | Partner with Fiscal Service to move debts to Centralized Receivables Service (CRS) and develop a plan for misuse OPs by instituting regular follow-up with organizational representative payees. | Reviewing our policy to align with the transition to electronic remittances. Continue with pilot for CRS. Review and monitor our plan to streamline organizational representative payee OP recovery and coordinate debt collection options. |
| 3 | **Recovery Activity** | Continue to expand the availability of our electronic payment options to all OP notices (e.g., Title II Redesign). | We implemented electronic payment options on Title II Redesign notices. |

| Amt($) | Root Cause of Overpayment | Root Cause Description | Mitigation Strategy | Brief Description of Mitigation Strategy and Anticipated Impact |
|---|---|---|---|---|
| **$927M** | Overpayments that occurred because of a Failure to Access Data/Information Needed. | The root cause of OPs within the agency's control is failure to access data/information needed. The beneficiary or a third party provided the data/information to prevent overpayment, but we did not use the data to validate accuracy prior to issuing a payment. | 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. | Onboarding and compliance with Treasury's DNP which 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. |
| **$905M** | Overpayments that occurred because of an Inability to Access the Data/Information Needed. | The root cause of OPs 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. | We implemented an exchange with commercial PDPs, referred to as PIE. This reduces our reliance on beneficiaries to self-report wage and employment information and improves timely receipt of wage and employment information; thereby, reducing improper payments. |

We issue over $143 billion in Disability Insurance benefit payments each year. As responsible stewards of our programs and in compliance with legal requirements, we conduct quality reviews, cost-effective program integrity activities, 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.