



Office of the Inspector General

SOCIAL SECURITY ADMINISTRATION

MEMORANDUM

Date: June 30, 2026

Refer To: 002649

To: Chad Poist
Chief Risk Officer

From: Michelle L. Anderson *Michelle L. Anderson*
Assistant Inspector General for Audit

Subject: Fiscal Year 2026 4th Quarter Office of Audit Work Plan

Attached is a list of reviews we plan to begin through September 30, 2026.

Because circumstances may change during the quarter, we may decide to postpone some projects or initiate reviews that are not reflected in this Plan. This flexibility enables us to meet emerging and critical issues as they arise during the upcoming period. This quarter's plan relists some jobs that were included in prior Work Plans but were not actually started due to delays caused by the government shutdown, higher priority work, or other reasons.

We prioritize our work to focus our resources on those areas that are most vulnerable to fraud, waste, and abuse. Our Plan is dynamic. As such, please note that these are preliminary titles and objectives, and we may change them later.

As always, we encourage and welcome feedback from Agency executives and staff, including any suggestions they may have for areas we should consider studying. If you wish to discuss this Work Plan, please contact me or have your staff contact Kristen Schnatterly, Executive Officer for the Office of Audit.

Attachment

FISCAL YEAR 2026 4TH QUARTER OFFICE OF AUDIT WORK PLAN

Title, Identification Number, and Planned Objective	Related Management Challenge(s)					
	Service Delivery	Secure Information	Modernize IT	Disability Programs	Improper Payments	N/A Mandatory
Projects we plan to start in July 2026						
1. *Social Security Administration's Assignment of Representative Payees for Incapable Beneficiaries (022519). To determine whether the Social Security Administration (SSA) appropriately assigned representative payees and issued benefit payments to those payees for beneficiaries determined to be incapable of managing or directing the management of their finances.	✓					
2. Collection of Overpayments through Repayment Plans (032516). To determine whether SSA improved its ability to recover overpayments through repayment plans.					✓	
3. *Use of the Social Security Number Verification Service (042619). To determine whether SSA detected and addressed improper use of the Social Security Number Verification System by employers and third-party submitters in accordance with policy.		✓				
4. *SSA's National 800-number Interactive Voice Response System (032412). To determine whether SSA's National 800-number Interactive Voice Response (IVR) system is accurately recognizing, and responding to, callers' inquiries.	✓					

Title, Identification Number, and Planned Objective	Related Management Challenge(s)					
	Service Delivery	Secure Information	Modernize IT	Disability Programs	Improper Payments	N/A Mandatory
5. <i>*Supplemental Security Income Recipients' Life Insurance Policies with Cash Surrender Values (022606)</i> . To determine whether SSA is accurately determining Supplemental Security Income (SSI) recipients' life insurance policies with cash surrender values as countable resources.					✓	
Projects we plan to start in August 2026						
6. <i>Follow-up on the Manual Actions on Old-Age, Survivors and Disability Insurance Post-Entitlement Alerts (042511)</i> . To determine whether SSA employees accurately processed post-entitlement alerts for Old Age, Survivors, and Disability Insurance beneficiaries generated by the Title 2 Redesign system.					✓	
7. <i>Social Security Administration's Agreements for Reporting Inmate Data (022513)</i> . To determine whether correctional facilities and mental health institutions that have agreements with SSA are reporting inmate data as required.					✓	
8. <i>Representative Payees with Criminal Convictions (032413)</i> . To assess SSA's compliance with requirements prohibiting individuals convicted of certain crimes from serving as representative payees.	✓					
9. <i>*Social Security Administration's Compliance with the Campos Settlement (152508)</i> . To determine whether SSA completed actions required by the settlement agreement in the case of Campos v. Kijakazi.					✓	

Title, Identification Number, and Planned Objective	Related Management Challenge(s)					
	Service Delivery	Secure Information	Modernize IT	Disability Programs	Improper Payments	N/A Mandatory
<p>10. Disabled Beneficiaries Whose Benefits Have Been Suspended for Address Development, Whereabouts Unknown or Miscellaneous Reasons (022626). To determine whether SSA is complying with its policies to resolve benefit suspensions for disabled beneficiaries due to address development, whereabouts unknown, or miscellaneous reasons.</p>				✓	✓	
<p>11. Potential Onset Dates for Disability Claims Filed Online (052639). To determine whether SSA employees correctly identified potential onset dates for Disability Insurance and SSI disability claims filed online.</p>				✓	✓	
<p>12. Follow-Up: Beneficiaries Whose Payments Have Been Suspended for No Child in Care and Who are Serving as Representative Payees for Children (052647). To determine whether SSA followed policy when it suspended benefits to parent¹ recipients who were serving as representative payees for child beneficiaries and whom SSA determined did not have children in their care.</p>					✓	
Projects we plan to start in September 2026						
<p>13. Unauthorized mySSA Direct Deposit Changes (022625). To determine whether Social Security benefits are being misdirected because of unauthorized direct deposit changes made through mySocial Security.</p>	✓				✓	

¹ This includes beneficiaries receiving benefits as a spouse who have children in their care.

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	Service Delivery	Secure Information	Modernize IT	Disability Programs	Improper Payments	N/A Mandatory
<p>14. Duplicate Documents in Hearings Folders (042404). To determine whether the Duplicate Identification Process reduces hearings processing times.</p>	✓			✓		
<p>15. The Social Security Administration's Implementation of the Social Security Fairness Act, which Repealed the Windfall Elimination and Government Pension Offset Provisions (042507). To determine whether SSA applied updates related to the repeal of the Windfall Elimination Provision and Government Pension Offset in accordance with the <i>Social Security Fairness Act of 2023</i>.</p>	✓				✓	

* Designated projects were included in prior Audit Work Plans but were not started.