



SOCIAL SECURITY ADMINISTRATION

[Docket No. SSA-2025-0030]

Privacy Act of 1974; System of Records

AGENCY: Social Security Administration (SSA).

ACTION: Notice of a new system of records.

SUMMARY: In accordance with the Privacy Act of 1974, we are issuing public notice of our intent to establish a new system of records entitled, Client Data System (60-0392).

We will use the information in this system of records to track data fields that are used across multiple agency systems to help ensure consistent and up-to-date information is maintained to effectively and efficiently communicate with customers and administer Social Security programs, as detailed in the PURPOSE section. This notice publishes details of the new system as set forth under the caption, SUPPLEMENTARY INFORMATION.

DATES: The system of records notice (SORN) is applicable upon its publication in today's *Federal Register*, with the exception of the new routine uses, which are effective [INSERT DATE 30 DAYS AFTER DATE OF PUBLICATION IN THE *FEDERAL REGISTER*].

We invite public comment on the routine uses or other aspects of this SORN. In accordance with the Privacy Act of 1974, we are providing the public a 30-day period in which to submit comments. Therefore, please submit any comments by [INSERT DATE 30 DAYS AFTER DATE OF PUBLICATION IN THE *FEDERAL REGISTER*].

ADDRESSES: The public, Office of Management and Budget (OMB), and Congress may comment on this publication by writing to the Head of Privacy and Disclosure Policy, Law and Policy, SSA, Room G-401 West High Rise, 6401 Security Boulevard, Baltimore, Maryland 21235-6401, or through the Federal e-Rulemaking Portal at

<https://www.regulations.gov>. Please reference docket number SSA-2025-0030. All comments we receive will be available for public inspection at the above address and we will post them to <https://www.regulations.gov>.

FOR FURTHER INFORMATION CONTACT: Tristin Dorsey, Government Information Specialist, Disclosure and Data Support Division, Privacy and Disclosure Policy, Law and Policy, SSA, Room G-401 West High Rise, 6401 Security Boulevard, Baltimore, Maryland 21235-6401, telephone: (410) 965-1727, e-mail: LP.PDP.SORN@ssa.gov.

SUPPLEMENTARY INFORMATION: We are establishing the Client Data System to track and manage information about a customer including personal information and customer interactions, which will support SSA's business processes and administration of Social Security programs, including but not limited to, pre-claims, claims processing, and post-entitlement situations. This system will be used to track data fields that are maintained in multiple SSA systems to help ensure consistent information across systems. With this system, SSA employees will be able to serve SSA customers more efficiently and effectively by providing one main location to view information concerning the customer.

In accordance with 5 U.S.C. 552a(r), we have provided a report to OMB and Congress on this new system of records.

Matthew Ramsey,
Head of Privacy and Disclosure Policy,
Law and Policy.

SYSTEM NAME AND NUMBER: Client Data System, 60-0392

SECURITY CLASSIFICATION: Unclassified.

SYSTEM LOCATION:

Social Security Administration

Chief Information Officer

Shared IT & Enterprise Services

6401 Security Boulevard

Baltimore, Maryland 21235

Information is also located in additional locations in connection with cloud-based services and kept at an additional location as backup for business continuity purposes.

SYSTEM MANAGER(S):

Social Security Administration

Chief Information Officer

Shared IT & Enterprise Services

6401 Security Boulevard

Baltimore, MD 21235

(410) 965-1727

Social Security Administration

Chief

Digital Services

6401 Security Boulevard

Baltimore, MD 21235

(410) 965-1727

AUTHORITY FOR MAINTENANCE OF THE SYSTEM: Sections 202-205, 223, 226, 228, 1602, 1611-1616, 1631, 1633, 1634, 1818, 1836, and 1840 and Title VIII of the Social Security Act, as amended; and the Internal Revenue Code (26 U.S.C. 6103(l)(1)(A)).

PURPOSE(S) OF THE SYSTEM: We will use the information in this system of records to track data fields that are used across multiple agency systems to help ensure consistent and up-to-date information is maintained to effectively and efficiently communicate with customers and administer Social Security programs. We will also use the information in this system of records to:

- provide a centralized location to view the covered customer data;
- determine and manage customer preferences, such as methods of communication;
- track and manage customer interactions;
- track applicable customer authorization, e.g., consent for disclosure for in-person identity proofing purposes, consent to text;
- complete customer transactions such as pre-claims, claims processing, and post-entitlement situations;
- make informed decisions about priority workloads, staffing needs, and equipment needs;
- form agency strategic goals and funding decisions;
- determine agency operating plans and public service indicators; and
- to assist in the administration of Social Security programs, such as identity verification of SSA customers, prevention of fraud in the Social Security program, research that relates to the Social Security program, and other uses that help administer the Social Security program.

We may also use contact information (e.g., email addresses) provided by individuals who conduct business with SSA for program outreach (e.g., notification about our programs,

online services, SSA events, and surveys) and other purposes related to our administration of the Social Security Act.

CATEGORIES OF INDIVIDUALS COVERED BY THE SYSTEM: This system maintains information on individuals who have been issued a Social Security number (SSN), including those who have conducted business with SSA beyond enumeration.

CATEGORIES OF RECORDS IN THE SYSTEM: This system maintains records on customers including, but not limited to:

- *Identity Information:* This information may include name; SSN; sex; date of birth; parent name(s); and place of birth.
- *Citizenship Information:* This information may include country of citizenship.
- *Contact Information:* This information may include mailing address; email address; written and spoken language; telephone number; opt-in and opt-out of electronic messaging selections; applicable customer authorizations; contact's relationship with number holder, i.e., parental or marriage; customer interaction history, including notes or remarks entered by technicians; and details of customer contact and verification history.
- *Representative Payee Information:* This information may include names, SSNs, telephone number(s), and address of current representative payee and relationship with the beneficiary.
- *Appointed Representative Information:* This information may include name and telephone number(s) of current appointed representatives; and fee agreement information including whether the fee has been waived and/or whether direct payment has been waived.
- *Benefits Information:* This information may include title II benefit and title XVI payment amounts; effective dates of benefit and payment amounts; and claim number.

- *Earnings Information:* This information may include yearly earnings and quarters of coverage; and voluntary tax withholding rates.
- *Accommodation Information:* This information may include special notice formats for individuals that may be blind or visually impaired, e.g., Braille or large-print; language interpreter needs; and accommodations for individuals that may be deaf or hard of hearing, e.g., passing notes or use of a hearing loop.
- *Marriage Information:* This information may include spouse's SSN, name and date of birth; marriage start and end dates; reason for marriage end; place of marriage; marriage type, e.g., whether marriage conducted by clergyman/public official, common law or other ceremony; whether spouse is deceased, disabled, or blind; and address.
- *Warning or Alert Information:* This information may include electronic block, high-risk, and special indicator warnings.
- *Military Service Information:* This includes indicators for Department of Defense Wounded Warrior and Department of Veterans Affairs 100% Permanent and Total Disability Compensation Rating.

RECORD SOURCE CATEGORIES: We obtain information in this system of records primarily from existing SSA systems of records such as the Master Files of SSN Holders and SSN Applications, 60-0058; Earnings Recording and Self-Employment Income System, 60-0059; Claims Folders System, 60-0089; Master Beneficiary Record, 60-0090; Supplemental Security Income Record and Special Veterans Benefits, 60-0103; Master Representative Payee File, 60-0222; Medicare Database File, 60-0321; Appointed Representative File, 60-0325; Appointments, Visitor Information, and Customer Service Record System, 60-0350; Digital Identity File System, 60-0373; Requests for Accommodation from Members of the Public, 60-0378; and Customer Engagement Tools Record System, 60-0383.

We also obtain information from the number holder; appointed representatives; representative payees; third parties such as a contractor or vendor; and Federal, State, and local agencies.

ROUTINE USES OF RECORDS MAINTAINED IN THE SYSTEM, INCLUDING

CATEGORIES OF USERS AND THE PURPOSES OF SUCH USES: We will

disclose records pursuant to the following routine uses; however, we will not disclose any information defined as “return or return information” under 26 U.S.C. 6103 of the Internal Revenue Code (IRC), unless authorized by statute, the Internal Revenue Service (IRS), or IRS regulations.

1. To a congressional office in response to an inquiry from that office made on behalf of, and at the request of, the subject of the record or a third party acting on the subject’s behalf.
2. To the Office of the President, in response to an inquiry received from that office made on behalf of, and at the request of, the subject of the record or a third party acting on the subject’s behalf.
3. To the National Archives and Records Administration (NARA) under 44 U.S.C. 2904 and 2906.
4. To appropriate agencies, entities, and persons when:
 - (a) SSA suspects or has confirmed that there has been a breach of the system of records;
 - (b) SSA has determined that as a result of the suspected or confirmed breach there is a risk of harm to individuals, SSA (including its information systems, programs, and operations), the Federal Government, or national security; and
 - (c) the disclosure made to such agencies, entities, and persons is reasonably necessary to assist in connections with SSA’s efforts to respond to the suspected or confirmed breach or to prevent, minimize, or remedy such harm.

5. To another Federal agency or Federal entity, when SSA determines that information from this system of records is reasonably necessary to assist the recipient agency or entity in:
 - (a) responding to a suspected or confirmed breach; or
 - (b) preventing, minimizing, or remedying the risk of harm to individuals, the recipient agency or entity (including its information systems, programs, and operations), the Federal Government, or national security, resulting from a suspected or confirmed breach.
6. To the Department of Justice (DOJ), a court or other tribunal, or another party before such court or tribunal, when:
 - (a) SSA, or any component thereof; or
 - (b) any SSA employee in the employee's official capacity; or
 - (c) any SSA employee in the employee's individual capacity where DOJ (or SSA where it is authorized to do so) has agreed to represent the employee; or
 - (d) the United States or any agency thereof, where SSA determines the litigation is likely to affect SSA or any of its components, is a party to the litigation or has an interest in such litigation, and we determine that the use of such records by DOJ, a court or other tribunal, or another party before the tribunal is relevant and necessary to the litigation, provided, however, that in each case, we determine that such disclosure is compatible with the purpose for which the records were collected.
7. To Federal, State, and local law enforcement agencies and private security contractors, as appropriate, information necessary:
 - (a) to enable them to ensure the safety of our employees and customers, the security of our workplace, and the operation of our facilities, or

(b) to assist investigations or prosecutions with respect to activities that affect such safety and security or activities that disrupt the operations of our facilities.

8. To contractors and other Federal agencies, as necessary, for assisting SSA in the efficient administration of its programs. We will disclose information under this routine use only in situations in which we may enter into a contractual or similar agreement to obtain assistance in accomplishing an agency function relating to this system of records.
9. To student volunteers, individuals working under a personal services contract, and other workers who technically do not have the status of Federal employees, when they are performing work for us, as authorized by law, and they need access to personally identifiable information (PII) in our records in order to perform their assigned agency functions.
10. To contractors, cooperative agreement awardees, State agencies, Federal agencies, and Federal congressional support agencies for research and statistical activities that are designed to increase knowledge about present or alternative Social Security programs; are of importance to the Social Security program or the Social Security beneficiaries; or are for an epidemiological project that relates to the Social Security program or beneficiaries. We will disclose information under this routine use pursuant only to a written agreement with SSA.
11. Tax return information to the Department of the Treasury, IRS, for the purpose of auditing SSA's compliance with the safeguard provisions of the IRC of 1986, as amended.
12. To third parties when an individual involved with a request needs assistance to communicate because of a hearing impairment or a language barrier (e.g., to interpreters, telecommunications relay system operators).

13. To the Secretary of Health and Human Services (HHS) or to any State, the Commissioner shall disclose any record or information requested in writing by the Secretary, for the purpose of administering a program administered by the Secretary, if records of information of such type were so disclosed under applicable rules, regulations, and procedures in effect before the date of enactment of the Social Security Independence and Program Improvements Act of 1994.
14. To Federal, State, or local agencies (or agents on their behalf), for administering income or health maintenance programs including programs under the Social Security Act. Such disclosures include the release of information to the following agencies, but are not limited to:
- (a) Railroad Retirement Board (RRB), for administering provisions of the Railroad Retirement Act and Social Security Act, relating to railroad employment, and for administering provisions of the Railroad Unemployment Insurance Act;
 - (b) Department of Veterans Affairs (VA), for administering 38 U.S.C. 1312, and upon request, for determining eligibility for, or amount of, veterans' benefits or for verifying other information with respect thereto pursuant to 38 U.S.C. 5106;
 - (c) Department of Labor for administering provisions of Title IV of the Federal Coal Mine Health and Safety Act, as amended by the Black Lung Benefits Act;
 - (d) State welfare departments, for administering sections 205(c)(2)(B)(i)(II) and 402 of the Social Security Act, which require information about assigned SSNs for Temporary Assistance for Needy Families (TANF) program purposes, and for determining a beneficiary's eligibility under the TANF program;

- (e) State agencies for administering the Medicaid program; and
- (f) State agencies for making determinations of food stamp eligibility under the food stamp program.

15. To third party contacts (e.g., employers and private pension plans) in situations where an individual's whereabouts are unknown or the party to be contacted has, or is expected to have, information relating to the individual's capability to manage their benefits or payments, or their eligibility for or entitlement to benefits or eligibility for payments, under the Social Security program when:

(a) The individual is unable to provide information being sought. An individual is considered to be unable to provide certain types of information when:

- i. they are incapable or is of questionable mental capability;
- ii. they cannot afford the cost of obtaining the information; or
- iii. the custodian of the information will not, as a matter of policy, provide it to the individual; or

(b) the data is necessary to establish the validity of evidence or to verify the accuracy of information presented by the individual, and it concerns one or more of the following:

- i. their entitlement to or eligibility for benefits under the Social Security program;
- ii. the amount of their benefit or payment; or
- iii. any case in which the evidence is being reviewed, as a result of suspected abuse or fraud or concern for program integrity, quality appraisal or evaluation and measurement activities.

16. To the Department of State, for administration of the Social Security Act in foreign countries through services and facilities of that agency.

17. To Department of Homeland Security, upon request, to identify and locate aliens in the United States pursuant to section 290(b) of the Immigration and Nationality Act (8 U.S.C. 1360(b)).
18. To third party contacts (e.g., State bureaus of vital statistics) that issue documents or confer a specific status to a person, when the third party has, or is expected to have, information that will verify the document/status.
19. To an individual, when information about themselves or others, which is filed under someone else's Social Security number, affects the individual's entitlement to Social Security benefits or the amount of those benefits (e.g., relevant records to an adversely affected beneficiary).
20. To Federal, State, and local law enforcement agencies, with jurisdiction to investigate or prosecute criminal violations of the Social Security Act, or other applicable statutes to which criminal penalties attach, when the agency determines that the information is relevant and necessary to the investigation or prosecution.
21. To the American Institute, a private corporation under contract to the Department of State, for administering the Social Security Act in Taiwan through facilities and services of that agency.
22. To the VA, Regional Office, Manila, Philippines, for the administration of the Social Security Act in the Philippines and other parts of the Asia-Pacific region through services and facilities of that agency.
23. To the Department of Interior and its agents, for the purpose of administering the Social Security Act in the Northern Mariana Islands through facilities and services of that agency.
24. To claimants, prospective claimants (other than the data subject), and their appointed representatives and those working with such representatives (including, but not limited to, partners, associates, and contractors) when the information pertains to the

individuals whom the appointed representative is representing; and to representative payees, when the information pertains to individuals for whom they serve as representative payees, for the purpose of assisting us in administering representative payment responsibilities under the Social Security Act, to the extent necessary to pursue Social Security claims, and for the purpose of assisting them in performing their duties as payees, including receiving and accounting for benefits for individuals for whom they serve as payees.

25. To specified business and other community members and Federal, State, and local agencies for verification of eligibility for benefits under section 1631(e) of the Social Security Act.
26. To third party contacts (including private collection under contract with us), for the purpose of their assisting us in recovering overpayments.
27. To State and local government agencies, in situations involving suspected abuse, neglect, or exploitation of minor children or vulnerable adults, to report suspected abuse or determine a victim's eligibility for services.
28. To HHS, Office of Child Support Enforcement, as required by section 453(e)(2) and (j)(1) of the Social Security Act for the administration of the Federal Parent Locator System.
29. Limited information to third parties as necessary to reach claimants, beneficiaries, and others SSA has a business need to reach related to records in this system.
30. To the U.S. Department of the Treasury, when disclosure of the information is relevant to review SSA's payment and award eligibility through the Do Not Pay Working System for the purposes of identifying, preventing, or recouping improper payments to an applicant for, or recipient of, Federal funds, including funds disbursed by a state (meaning a state of the United States, the District of Columbia, a territory or possession of the United States, or a federally recognized Indian tribe) in a state-

administered, federally funded program. This routine use will be applied when disclosure meets the requirements in 20 CFR § 401.150(c).

POLICIES AND PRACTICES FOR STORAGE OF RECORDS: We will maintain records in this system in electronic form.

POLICIES AND PRACTICES FOR RETRIEVAL OF RECORDS: We will retrieve records in this system by the number holder's SSN.

POLICIES AND PRACTICES FOR RETENTION AND DISPOSAL OF

RECORDS: In accordance with NARA rules codified at 36 CFR 1225.16, we maintain records in accordance with approved NARA General Records Schedule (GRS) 3.1, item 011; GRS 3.2, item 020; GRS 4.2, item 170; and GRS 5.2, items 010 and 020; and agency-specific records schedule, N1-047-05-001.

ADMINISTRATIVE, TECHNICAL, AND PHYSICAL SAFEGUARDS: We retain electronic files containing personal identifiers in secure storage areas accessible only by our authorized individuals, including our employees and contractors, who have a need for the information when performing their official duties. Security measures include, but are not limited to, the use of codes and profiles, personal identification numbers and passwords, and personal identification verification cards. We restrict access to specific correspondence within the system based on assigned roles and authorized users. We use audit mechanisms to record sensitive transactions as an additional measure to protect information from unauthorized disclosure or modification.

We annually provide authorized individuals, including our employees and contractors, with appropriate security awareness training that includes reminders about the need to protect PII and the criminal penalties that apply to unauthorized access to, or disclosure of, PII (5 U.S.C. 552a(i)(1)). Furthermore, authorized individuals with access to databases maintaining PII must annually sign a sanctions document that acknowledges their accountability for inappropriately accessing or disclosing such information.

RECORD ACCESS PROCEDURES: Individuals may submit requests for information about whether this system contains a record about them by submitting a written request to the system manager at the above address, which includes their name, SSN, or other information that may be in this system of records that will identify them. Individuals requesting notification of, or access to, a record by mail must include: (1) a notarized statement to us to verify their identity; or (2) must certify in the request that they are the individual they claim to be and that they understand that the knowing and willful request for, or acquisition of, a record pertaining to another individual under false pretenses is a criminal offense.

Individuals requesting notification of, or access to, records in person must provide their name, SSN, or other information that may be in this system of records that will identify them, as well as provide an identity document, preferably with a photograph, such as a driver's license. Individuals lacking identification documents sufficient to establish their identity must certify in writing that they are the individual they claim to be and that they understand that the knowing and willful request for, or acquisition of, a record pertaining to another individual under false pretenses is a criminal offense.

Under 20 CFR 401.35, you are only entitled to seek access to records about yourself. Thus, when providing access, we may need to redact or otherwise withhold information about third parties in a record retrieved by your identifier. To the extent you seek access to a record with information about more than one individual, under 20 CFR 401.60, you may only receive access to information about you, the fact of entitlement, and the amount of benefits payable to other persons based on your record.

These procedures are in accordance with our regulations at 20 CFR 401.40 and 401.45.

CONTESTING RECORD PROCEDURES: Same as record access procedures.

Individuals should also reasonably identify the record, specify the information they are

contesting, and state the corrective action sought and the reasons for the correction with supporting justification showing how the record is incomplete, untimely, inaccurate, or irrelevant.

As recognized under the “Records Source Categories” information maintained in this system may be sourced from other agency systems of records. Dependent on the information the individual is seeking to contest, the individual may need to identify each system of records in which the individual seeks to correct or amend the record and follow the procedures for contesting records within the applicable system of records notice.

These procedures are in accordance with our regulations at 20 CFR 401.65(a).

NOTIFICATION PROCEDURES: Same as records access procedures. These procedures are in accordance with our regulations at 20 CFR 401.40 and 401.45.

EXEMPTIONS PROMULGATED FOR THE SYSTEM: None.

HISTORY: None.

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