

Appendix II: Legislation Affecting Social Security Introduced in the 110th-113th Congresses

Bill Name, Bill Sponsor(s), Date Introduced, Congressional Session, Changes to Social Security*	Adjusts the cap or raises revenue from higher earners	Increases the contribution rate for some or all earners	Switches to CPI-E; or raises benefits across the board	Increases minimum/special minimum benefit	Increases benefits for widows or the very old	Extends benefits for same-sex married couples and partnerships	Caregiver credit option	Restores student benefits	Raises or increases acceleration of retirement age; or requires additional years of work for max benefits	Establishes "progressive price indexing;" reduces COLA; or includes Chained CPI	Establishes individual account in or outside Social Security
"Social Security Guarantee Plus Act of 2007" (H.R. 1090) Rep. Ron Lewis (R-WI) (2/15/2007), 110th Congress Repeals the limitation on the amount of outside income which beneficiaries age 62 or over may earn (earnings test) without issuing a reduction in benefits. Increases widow's and widower's insurance benefits. Provides benefits for disabled widows and widowers without regard to age. Repeals the seven-year restriction on eligibility for widow's and widower's insurance benefits based on disability. Waives the two-year waiting period for a divorced spouse's benefits if the other spouse remarries. Provides up to five years of earning credits for those who stay at home to care for a child under the age of seven. Lowers the Social Security spousal/widow(er)'s benefit reduction under the Government Pension Offset from noncovered employment. Establishes a voluntary individual account system.					✓		✓				✓
"Saving Social Security Act of 2008" (S.2765) Sen. Chuck Hagel (R-NE) (3/13/2008), 110th Congress Allows workers born in 1963 or later to redirect 4 percent of the current Social Security payroll tax to an individual account (a SAFE account - "Social Security Saving Accounts For Employees"). Indexes initial benefits to increases in life expectancy, increases the full retirement age from 67 to 68 for persons born in 1963 or later, and increases the early retirement reduction. For workers participating in the SAFE account, Social Security benefits would have been offset by an amount equal to the annuity value of a hypothetical account assumed to earn a 3 percent real rate of return. Provides a minimum primary insurance amount (PIA) up to 135 percent of the poverty level for workers with 35 years of Social Security covered employment.				✓					✓		✓
"Social Security Solvency Act of 2009" (S.426) Sen. Robert F. Bennett (R-UT) (2/12/2009), 111th Congress Modifies the benefit formula to provide "progressive price indexing" of initial Social Security benefits for future retirees. Indexes initial benefits to increases in life expectancy, and accelerate the increase in the full retirement age from 65 to 67, being phased-in under current law, so that the full retirement age will reach 67 for persons born in 1955 or later.									✓	✓	
"Social Security Forever Act of 2009" (H.R.1863) Rep. Robert Wexler (D-FL) (4/1/2009), 111th Congress Requires workers and employers each to contribute 3 percent of earnings above the taxable wage base, in addition to the 6.2 percent of earnings up to the taxable wage cap payable under current law. Earnings above the taxable wage cap taxed at the 3 percent rate would not have been credited for benefit computation purposes.		✓									

Key: Green check mark indicates revenue increase, blue check mark benefit increase, red check mark benefit cut.

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<p>"Roadmap for America's Future Act of 2010" (H.R.4529) Rep. Paul Ryan (R-WI) (1/27/2010), 111th Congress</p> <p>Introduce a voluntary individual accounts system to allow workers aged 55 or younger in 2012 to redirect a portion of their payroll tax contributions. Modifies the Social Security benefit formula to provide "progressive price indexing" of initial monthly benefits for future retirees. Accelerates the increase in the full retirement age to 67 for persons born in 1959. It further increases the full retirement age for persons born in later years to reflect projected increases in life expectancy. Increases the minimum benefits for low-income workers by increasing the benefits to at least 120 percent of the poverty level for those who opt out of the individual account system. Individuals who choose to participate in the personal account system receive annuity payments of at least 150 percent of the poverty level.</p>				✓					✓	✓	✓
<p>"Preserving our Promise to Seniors Act" (H.R.539) Rep. Theodore Deutch (D-FL) (2/8/2011), 112th Congress</p> <p>Gradually eliminates the tax cap by 2018 and counts earnings above the cap towards modest benefits (using a modified benefits formula). Changes the basis for the Social Security cost-of-living adjustment (COLA) formula so that it's based on the Consumer Price Index for the Elderly (CPI-E). Provides a supplemental payment to Social Security beneficiaries in years for which no COLA is payable. Creates a point of order against legislation that proposes to "privatize" Social Security or reduce benefits.</p>	✓		✓								
<p>"Social Security Solvency and Sustainability Act" (S.804) Sen. Lindsey Graham (R-SC) (4/13/2011), 112th Congress</p> <p>Increases the full retirement age by three months each year, beginning with persons who attain age 62 in 2017, until it reaches age 70. After the full retirement age reaches age 70, it would be increased by about one month every two years to maintain a constant ratio of expected retirement years to potential working years. The early retirement age would be increased from age 62 to 64 for those who attain age 62 in 2028 or later. The Social Security benefit formula would be modified to provide "progressive price indexing" of initial monthly benefits for future retirees.</p>									✓	✓	
<p>"Defend and Save Social Security Act" (S.1213) and (S.3533) Sen. Kay Bailey Hutchison (R-TX) (6/16/2011 and 9/12/2012), 112th Congress</p> <p>Increases the full retirement age by three months each year, beginning with persons who attain age 62 in 2016, until it reaches age 70 for persons who attain age 62 in 2031 or later. The early retirement age would be increased from age 62 to age 64. The annual Social Security COLA would be computed as under current law and reduced by 1 percent.</p>									✓	✓	

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<p>"Social Security Caregiver Credit Act of 2011" (H.R.2290) Rep. Nita Lowey (D-NY) (6/22/2011), 112th Congress</p> <p>Establishes up to 5 years of credit for periods of time when a worker had no or reduced earnings because s/he was providing at least 80 hours of care per month to a dependent relative (i.e. child, grandchild, niece, nephew who is under the age of 12; or a child, grandchild, niece, nephew, parent, aunt, uncle, spouse, or domestic partner if considered a chronically dependent individual) without monetary compensation. The credit would be one-half of the average wage for all covered workers. This would include partial credit, so if the worker had reduced earnings, s/he would receive a credit equal to the difference between actual earnings and one-half the average wage. Extends caregiver credits to same-sex partnerships.</p>						✓	✓				
<p>"Act for the 99%" (H.R.3638) Rep. Raul Grijalva (D-AZ) (12/13/2011), 112th Congress</p> <p>Eliminates the tax cap. Applies the 12.4 percent payroll to all earning above \$250,000 starting in 2012. The additional taxable earnings would not be counted towards benefit computation.</p>	✓										
<p>"Rebuild America Act" (S.2252) and (H.R.5727) Sen. Tom Harkin (D-IA) and Rep. Rosa DeLauro (D-CT) (3/29/2012 and 5/10/2012), 112th Congress</p> <p>Gradually phases out the Social Security cap over the next 10 years. Requires the use of the CPI-E when calculating COLAs for all beneficiaries. Modifies the benefit formula which results in increased benefits across the board by approximately \$60 per month.</p>	✓		✓								
<p>"Protecting and Preserving Social Security Act" (S.308) and (HR.649) Sen. Mark Begich (D-AK) and Rep. Theodore Deutch (D-FL) (2/13/2013), 113th Congress</p> <p>Switches to the CPI-E. Gradually lifts the tax cap over 7 years and asks higher income earners to pay Social Security at the same rate as other earners.</p>	✓		✓								
<p>"Fiscal Sustainability Act of 2013" (S.11) Sen. Bob Corker (R-TN) (2/26/2013), 113th Congress</p> <p>Increases the number of computation years eligible for maximum benefits. Increases the minimum monthly Social Security insurance benefit for low-wage workers. Increases the early and full retirement ages. Amends the Internal Revenue Code to revise the formula for determining the COLA for any calendar year. Modifies the COLA of Social Security benefits to the Chained CPI. Increases benefits for the very old.</p>				✓	✓				✓	✓	

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<p>"Consumer Price Index for Elderly Consumers Act of 2013" (H.R.1030) Rep. Peter DeFazio (D-OR) (3/7/2013), 113th Congress</p> <p>Directs the Bureau of Labor Statistics of the Department of Labor to prepare and publish a monthly CPI-E. Issues the use of the CPI-E in computing the COLA to determine Social Security benefits.</p>			✓								
<p>"Keeping Our Social Security Promises Act" (S. 500) and "No Loopholes in Social Security Taxes Act" (H.R. 1029) Sen. Bernie Sanders (I-VT) and Rep. Peter DeFazio (D-OR) (3/7/2013), 113th Congress</p> <p>Adjusts the tax cap by subjecting earnings above \$250,000 to the payroll tax. Creates a temporary gap of earnings not taxed between the current cap and \$250,000; however, this gap will gradually close as the current tax cap reaches \$250,000.</p>	✓										
<p>"Alex's Law" (H.R.1160) Rep. Cynthia M. Lummis (R-WY) (3/14/2013), 113th Congress</p> <p>Increases the age for retirement to 70 and the early retirement age to 65 by January 1, 2069.</p>								✓			
<p>"Strengthening Social Security Act of 2013" (S.567) and (HR.3118) Sen. Tom Harkin (D-IA) and Rep. Linda Sanchez (D-CA) (3/14/2013 and 9/17/2013), 113th Congress</p> <p>Gradually eliminates the Social Security tax cap by having higher earners pay the same rate as other earners. Modifies the benefit formula which results in increased benefits across the board by approximately \$70 per month. Benefit increase is targeted to help those in the low and middle of the income distribution. Switches to the CPI-E.</p>	✓		✓								
<p>"Social Security Enhancement and Protection Act" (H.R.1374) Rep. Gwen Moore (D-WI) (3/21/2013), 113th Congress</p> <p>Increases the special minimum benefit paid to long-time low-wage workers based on years in the workforce and a percentage of 1/12th of the poverty guideline for the previous year. Gives credits of up to 5 years toward the minimum benefit for an individual who leaves the workforce to raise a child younger than six years old that lives in his/her home. Provides a 5 percent increase for the very old. Restores the benefits of survivors in college up to age 22. Eliminates the cap on taxable income and gradually increases the payroll tax towards Social Security benefits beginning in 2015.</p>	✓	✓		✓			✓	✓			
<p>"Guaranteed 3% COLA for Seniors Act of 2013" (H.R.1585) Rep. Eliot L. Engel (D-NY) (4/16/2013), 113th Congress</p> <p>Directs the Bureau of Labor Statistics to prepare and publish a monthly CPI-E that indicates changes over time in expenditures for the elderly. Requires the use of such an index to compute COLA increases for Social Security benefits. Provides an annual cost-of-living increase of at least 3 percent for individuals who have attained age 62.</p>			✓								

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<p>"Social Security Equality Act of 2013" (H.R.3050) Rep. Linda Sanchez (D-CA) (8/2/2013), 113th Congress</p> <p>Authorizes the treatment of permanent partnerships between individuals of the same gender as marriage for purposes of determining entitlement to Social Security benefits.</p>	—	—	—	—	—	✓	—	—	—	—	—
<p>"Provide for the Common Defense Act of 2013" (H.R.3639) Rep. Jim Bridenstine (R-OK) (12/3/2013), 113th Congress</p> <p>Requires the use of the Chained CPI for calculation of Social Security COLAs. This shifts the measure of cost-of-living from the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) to the Chained CPI.</p>	—	—	—	—	—	—	—	—	✓	—	—
<p>"Social Security and Marriage Equality Act" (S. 2305) Sen. Patty Murray (D-WA) (5/8/2014), 113th Congress</p> <p>Amends title II of the Social Security Act by clarifying that same-sex married couples, who live in states that do not recognize their marriages or civil unions, would be eligible to receive Social Security benefits.</p>	—	—	—	—	—	✓	—	—	—	—	—
<p>"Social Security Caregiver Credit Act of 2014" (H.R. 5024) Rep. Nita Lowey (D-NY) (7/8/2014), 113th Congress</p> <p>See "Social Security Caregiver Credit Act of 2011." The amended Act of 2014 sets the prospective start date for receiving caregiving credits in the form of deemed wages to December 2014 and expands the partial credit for working caregivers by establishing a phase out range for earnings between 1/2 the average wage and the full average wage for all covered workers. In all other major aspects, the caregiver credit remains the same: it is available for up to 5 years to those who provide unpaid care for at least 80 hours per month to a broad range of relatives of the worker, including his or her domestic partner, and the domestic partner's relatives. The maximum value of the credit is 1/2 the average wage of all covered workers.</p>	—	—	—	—	—	✓	✓	—	—	—	—

*Bill summaries have been collected and adapted from the Congressional Research Service, Center for Community Change, and Strengthen Social Security Coalition.

This appendix was prepared by Mary Sykes and Susan Andrzejewski.