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# Quarterly Benefit Statistics

U.S. Railroad Retirement Board  
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## Railroad Retirement and Unemployment Insurance Programs

Selected Current Statistics for **January - March 2019**

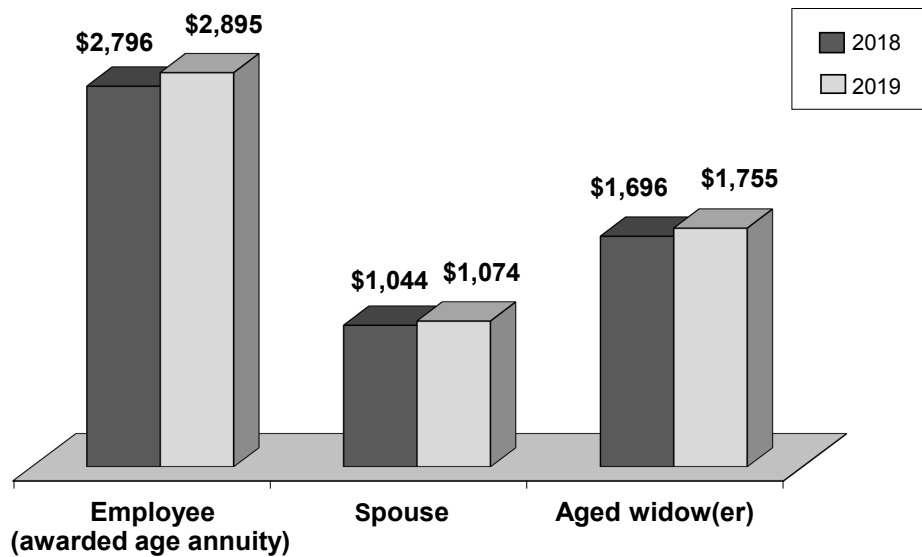
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**List of Tables:**

Table 1 - Retirement and Survivor Programs, Benefit Statistics
Table 2 - Retirement and Survivor Programs, Financial Statistics
Table 3 - Unemployment and Sickness Programs, Benefit Statistics
Table 4 - Unemployment and Sickness Programs, Financial Statistics
Table 5 - Benefits and Beneficiaries

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**Average annuity amounts,  
March 2018 and March 2019**



**Table 1: Retirement and Survivor Programs, Benefit Statistics  
January - March 2019**

Period	Employee annuities							
	Total <sup>1</sup>		Age			Supple- mental <sup>3</sup>	Spouse annuities	Divorced spouse annuities
	Monthly benefits	Monthly beneficiaries	Awarded age annuity	Disability converted to age annuity <sup>2</sup>	Disability			
<b>Number in current-payment status at end of period</b>								
March 2019	637,155	508,774	188,893	47,915	23,783	119,032	142,764	5,211
February 2019	637,982	509,320	189,086	47,833	24,003	119,297	142,777	5,166
January 2019	638,398	509,583	189,095	47,771	24,196	119,480	142,696	5,199
<b>Average amount in current-payment status at end of period</b>								
March 2019	.....	.....	\$2,894.55	\$2,548.27	\$2,812.86	\$41.51	\$1,074.30	\$680.80
February 2019	.....	.....	2,891.83	2,545.52	2,811.24	41.51	1,074.27	680.67
January 2019	.....	.....	2,888.94	2,542.65	2,811.02	41.51	1,072.70	677.74
<b>Number awarded during period</b>								
March 2019	2,430	2,163	646	.....	158	267	735	88
February 2019	2,563	2,280	671	.....	136	283	797	53
January 2019	2,763	2,481	777	.....	163	282	896	88
10/18 - 3/19	14,910	13,162	4,008	.....	837	1,748	4,687	375
10/17 - 3/18	16,220	14,069	4,488	.....	787	2,151	4,907	394
<b>Average amount awarded during period<sup>4</sup></b>								
March 2019	.....	.....	\$3,130.49	.....	\$2,920.86	\$40.78	\$1,007.65	\$715.68
February 2019	.....	.....	3,060.08	.....	2,870.05	40.21	1,109.42	834.24
January 2019	.....	.....	2,980.54	.....	2,949.67	40.20	1,052.66	825.29
<b>Benefit payments during period (thousands)<sup>5</sup></b>								
March 2019	\$1,086,683	.....	\$548,590	\$121,458	\$75,376	\$4,956	\$154,744	\$3,780
February 2019	1,084,444	.....	547,957	121,198	74,553	4,965	154,351	3,667
January 2019	1,088,673	.....	548,808	120,837	77,022	4,981	154,671	3,769
10/18 - 3/19	6,453,597	.....	3,254,008	715,922	448,642	29,888	917,730	21,826
10/17 - 3/18	6,318,657	.....	3,165,042	675,053	475,080	30,402	888,964	20,419

<sup>1</sup>Includes dependent parents' annuities. Except for benefit payment data, excludes insurance lump-sum and residual payment figures. Total benefit payments also include hospital insurance benefits for services in Canada. <sup>2</sup>A disability annuity ends when the retiree attains full retirement age, at which time the annuity converts to an age and service annuity. Consequently, these annuitants are receiving age and service annuities. Full retirement age gradually increases, from age 65 to 67, for those born between 1937 and 1960. It is age 67 for those born after 1959 and age 65 for those born before 1938. <sup>3</sup>Excludes partition payments to spouses and divorced spouses where the employee is deceased. Averages are after court-ordered partitions. <sup>4</sup>Regular employee and spouse annuity averages are preliminary estimates. <sup>5</sup>Data provided by the Bureau of Fiscal Operations.

**NOTE**--MONTHLY BENEFITS in CURRENT-PAYMENT STATUS at the end of month include all benefits awarded to date and payable for the month. BENEFITS AWARDED consist of those certified for the first time on either a partial or final basis. BENEFIT PAYMENTS for a month, shown in both the benefit and financial statistics, consist of recurrent monthly checks dated the first of the month, plus retroactive and lump-sum payments made during the month, less returned checks (excluding those not yet distributed by Account), refunds of benefits paid previously, etc. Data are on a cash basis (unaudited) and are partly estimated.

**Table 1: Retirement and Survivor Programs, Benefit Statistics  
January - March 2019 -- Continued**

Survivor benefits									
Period	Annuities					Children	Insurance lump sums	Residual payments	Partition payments <sup>7</sup>
	Aged widows and widowers	Disabled widows and widowers <sup>6</sup>	Widowed mothers and fathers	Remarried widows and widowers	Divorced widows and widowers				
<b>Number in current-payment status at end of period</b>									
March 2019	82,996	3,330	578	2,842	9,716	8,115	.....	.....	1,960
February 2019	83,279	3,329	569	2,852	9,706	8,113	.....	.....	1,951
January 2019	83,450	3,331	561	2,861	9,687	8,111	.....	.....	1,939
<b>Average amount in current-payment status at end of period</b>									
March 2019	\$1,755.07	\$1,391.34	\$1,928.31	\$1,146.49	\$1,154.97	\$1,152.05	.....	.....	\$318.27
February 2019	1,751.11	1,391.47	1,930.86	1,147.79	1,153.23	1,150.77	.....	.....	319.14
January 2019	1,745.67	1,389.85	1,915.89	1,145.11	1,151.13	1,149.40	.....	.....	319.62
<b>Number awarded during period</b>									
March 2019	390	12	11	11	60	52	199	---	.....
February 2019	497	9	9	7	72	29	166	---	.....
January 2019	447	8	10	7	56	29	179	---	.....
10/18 - 3/19	2,539	50	51	55	361	199	1,024	1	.....
10/17 - 3/18	2,761	48	48	67	384	183	1,209	1	.....
<b>Average amount awarded during period<sup>4</sup></b>									
March 2019	\$2,159.57	\$1,345.77	\$1,394.92	\$1,031.55	\$1,273.44	\$1,436.34	\$921	---	.....
February 2019	2,250.65	1,364.55	1,887.60	1,314.71	1,238.31	1,458.09	924	---	.....
January 2019	2,310.37	1,465.53	1,469.58	1,051.86	1,274.02	1,545.19	917	---	.....
<b>Benefit payments during period (thousands)<sup>5</sup></b>									
March 2019	\$146,084	\$4,892	\$1,209	\$3,284	\$11,340	\$10,116	\$193	---	\$640
February 2019	146,459	4,843	1,205	3,284	11,351	9,762	163	---	665
January 2019	147,072	4,865	1,272	3,303	11,408	9,855	178	---	611
10/18 - 3/19	878,738	29,048	7,381	19,593	67,316	58,563	986	\$3	3,827
10/17 - 3/18	879,535	29,679	7,300	19,882	64,250	58,345	1,153	4	3,419

<sup>6</sup>Number and average in current-payment status, and benefit payments during period, includes annuities to disabled widow(er)s age 60 and over now payable as aged widow(er)s' annuities. <sup>7</sup>Limited to partition payments to spouses and divorced spouses where the employee is deceased or not otherwise entitled to an annuity. Partition payments from employees on the rolls are included with the employees' annuities.

**NOTE.**--(Continued from previous page.)

FOR WIDOWS and WIDOWERS aged 60 and over and WIDOWED MOTHERS and FATHERS, the number of benefits being paid and benefit payments include benefits temporarily being continued at spouse annuity rates, pending award of survivor annuities.

INSURANCE LUMP SUMS and RESIDUAL PAYMENTS are each counted only once with respect to an employee's death even though divided among 2 or more persons. Award data for insurance lump sums exclude deferred benefits, i.e., those payable a year after the employee's death.

Data on benefit payments are for CALENDAR MONTHS; all other data are for ACCOUNTING MONTHS ending on approximately the 29th of each month.

**Table 2: Retirement and Survivor Programs, Financial Statistics**  
**January - March 2019 (In thousands)**  
**Cash Basis (Unaudited)**

Item	March 2019	February 2019	January 2019	October 2018 - March 2019	October 2017 - March 2018
<b>RAILROAD RETIREMENT ACCOUNT</b>					
<b>Balance at beginning of period<sup>1</sup></b>	\$721,770	\$622,351	\$423,649	\$656,125	\$446,656
<b>Income, total</b>	626,970	729,418	829,760	3,814,453	3,893,305
Payroll taxes <sup>2</sup>	289,305	386,858	294,646	1,602,271	1,664,066
Income tax transfers <sup>3</sup>	.....	.....	100,000	270,000	219,000
Reimbursements for payment of SSA benefits	159,327	158,516	159,101	935,991	864,626
Transfers from National RR Investment Trust <sup>4</sup>	177,000	183,000	275,000	999,000	1,138,000
Undistributed recoveries of benefit payments <sup>5</sup>	11	-170	78	-53	363
Uncashed check credits from U.S. Treasury <sup>6</sup>	29	23	68	244	178
Interest on investments <sup>7</sup>	1,298	1,191	866	7,000	7,071
<b>Outgo, total</b>	631,754	630,000	631,057	3,753,594	3,610,514
Benefit payments	463,844	462,646	463,515	2,765,777	2,709,261
Payments of SSA benefits	159,130	158,569	158,765	935,450	863,247
Administrative expenses <sup>8</sup>	8,283	8,288	8,281	48,459	34,584
Funding for Office of Inspector General	496	496	496	3,908	3,421
<b>Balance at end of period<sup>1</sup></b>	716,985	721,770	622,351	716,985	729,446
<b>NATIONAL RAILROAD RETIREMENT INVESTMENT TRUST</b>					
<b>Cash and investment balance at end of period<sup>9</sup></b>	\$25,210,779	\$25,249,797	\$25,058,321	\$25,210,779	\$26,365,985
<b>DUAL BENEFITS PAYMENTS ACCOUNT<sup>10</sup></b>					
<b>Balance at beginning of period</b>	\$862	\$681	\$513	.....	.....
Congressional apportionments <sup>11</sup>	1,590	1,608	638	\$8,855	-\$1,000
Income tax transfers <sup>3</sup>	.....	.....	1,000	1,000	1,000
Vested dual benefit payments	1,480	1,427	1,470	8,883	10,446
<b>Balance at end of period</b>	972	862	681	972	-10,446

**Table 2: Retirement and Survivor Programs, Financial Statistics**  
**January - March 2019 (In thousands)**  
**Cash Basis (Unaudited) -- Continued**

Item	March 2019	February 2019	January 2019	October 2018 - March 2019	October 2017 - March 2018
<b>SOCIAL SECURITY EQUIVALENT BENEFIT ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$1,161,237	\$1,175,720	\$1,102,969	\$1,122,406	\$917,572
<b>Income, total</b>	591,600	609,377	699,935	3,704,762	3,766,117
Payroll taxes <sup>2</sup>	236,134	320,968	247,668	1,467,136	1,532,032
Income tax transfers <sup>3</sup>	.....	.....	67,000	127,000	148,000
Financial interchange advances <sup>12</sup>	353,535	286,252	383,172	2,098,252	2,075,499
RRB-SSA financial interchange transfer	.....	.....	.....	.....	.....
Interest on investments <sup>7</sup>	1,931	2,157	2,095	12,373	10,587
<b>Outgo, total</b>	624,848	623,861	627,184	3,699,178	3,613,851
Benefit payments	621,359	620,371	623,689	3,678,938	3,598,950
Repayment of financial interchange advances <sup>12</sup>	.....	.....	.....	.....	.....
RRB-CMS financial interchange transfer	.....	.....	.....	.....	.....
Administrative expenses <sup>8</sup>	3,292	3,292	3,298	18,686	13,533
Funding for Office of Inspector General	197	198	197	1,555	1,369
<b>Balance at end of period</b>	1,127,989	1,161,237	1,175,720	1,127,989	1,069,838

<sup>1</sup>Balances include liabilities for uncashed checks. As of the end of March 2019 liabilities were \$15,032,000. <sup>2</sup>Net of U.S. Treasury adjustments for payroll tax refunds to certain carriers and their employees for prior periods. <sup>3</sup>Amounts include U.S. Treasury adjustments for prior period income tax reconciliations. <sup>4</sup>Under the Railroad Retirement and Survivors' Improvement Act of 2001, as amended, the portion of the RR Account not needed to pay current administrative expenses is to be transferred to the National Railroad Retirement Investment Trust (Trust). The Trust may transfer funds back to the RR Account for payment of benefits. The balance of the SSEB Account not needed to pay current benefits and administrative expenses is to be transferred to the Trust or to the RR Account. <sup>5</sup>Net of amounts distributed by account. <sup>6</sup>Net of returns of uncashed check credits. Includes undistributed canceled checks under 1-year limited payability. <sup>7</sup>Net of adjustments for payroll tax refunds (see note 2). <sup>8</sup>Reflects adjustments for prior periods. <sup>9</sup>Source: National Railroad Retirement Investment Trust. <sup>10</sup>Total vested dual benefits paid during a fiscal year are limited to the amount appropriated to the Dual Benefits Payments Account for that year. Any amounts not spent are returned to the U.S. Treasury. The benefit appropriation for fiscal year 2019 was \$19.0 million, including income tax transfers. The appropriation for 2018 was \$22.0 million, including income tax transfers. Funds for October 2017 through March 2018 were provided under a partial year continuing resolution. Final appropriation for fiscal year 2018 was signed into law on March 23, 2018. <sup>11</sup>Includes a small amount of interest on uncashed checks. <sup>12</sup>Includes interest.

**NOTE**--Data relate to CALENDAR month.

**SOURCE:** Bureau of Fiscal Operations

Detail may not add to totals shown because of rounding.

**Table 3: Unemployment and Sickness Programs, Benefit Statistics  
January - March 2019**

Period	Normal benefit accounts			Beneficiaries		
	Applications received	Opened	Exhausted	Total	Normal benefits	Extended benefits
<b>Unemployment</b>						
March 2019	622	596	187	2,787	2,350	521
February 2019	924	565	199	2,701	2,325	461
January 2019	977	746	715	2,918	2,876	327
7/18 - 3/19	7,936	5,606	1,299	6,274	6,178	808
7/17 - 3/18	9,608	7,412	1,536	8,128	8,038	887
<b>Sickness</b>						
March 2019	946	855	373	4,255	3,444	1,028
February 2019	1,134	738	523	4,203	3,623	884
January 2019	897	940	958	4,732	4,673	463
7/18 - 3/19	14,473	11,343	2,210	11,955	11,798	1,731
7/17 - 3/18	16,171	12,588	2,553	13,228	13,066	1,974
Period	Number of payments			Averages <sup>1</sup>		
	Total	Normal benefits	Extended benefits	Benefit days	Benefit per week <sup>2</sup>	Benefit payments <sup>2,3</sup> (thousands)
<b>Unemployment</b>						
March 2019	5,168	4,116	1,052	8.9	\$359.20	\$3,706
February 2019	4,847	3,981	866	9.0	358.95	3,304
January 2019	6,103	5,646	457	8.9	359.40	3,674
7/18 - 3/19	39,515	35,886	3,629	9.1	357.85	23,815
7/17 - 3/18	51,065	47,079	3,986	9.0	333.75	33,629
<b>Sickness</b>						
March 2019	8,859	6,552	2,307	8.8	\$360.05	\$3,350
February 2019	8,139	6,431	1,708	8.6	359.35	4,897
January 2019	10,668	9,992	676	8.8	359.45	5,034
7/18 - 3/19	78,897	71,461	7,436	8.9	360.55	40,945
7/17 - 3/18	89,583	81,155	8,428	8.9	337.20	45,266

<sup>1</sup> Benefit days--average benefit days per registration period. Benefit per week--equal to 5 times average daily benefit.

<sup>2</sup> In accordance with the Balanced Budget and Emergency Deficit Control Act of 1985, as amended by the Budget Control Act of 2011, amounts reflect a reduction of 7.3% under sequestration for days of unemployment and sickness September 30, 2014, 6.8% for days after September 30, 2015, 6.9% for days after September 30, 2016, 6.6% for days after September 30, 2017, and 6.2% for days payable after September 30, 2018.

<sup>3</sup> Data provided by the Bureau of Fiscal Operations.

**NOTE.**--An unemployment claimant files only one APPLICATION for a benefit year. A sickness claimant files an APPLICATION at the beginning of each period of continuing sickness.

NORMAL BENEFIT ACCOUNTS are opened when the first payment is made.

The number of BENEFICIARIES is the count of persons receiving unemployment or sickness benefits in the period. Those receiving both normal and extended benefits for unemployment or sickness are counted only once in the total for each type.

PAYMENTS generally cover 14-day registration periods. Benefits are payable for days over 7 during an employee's first 14-day registration period. Sickness benefits are paid for days of sickness after the 4th consecutive day of sickness in the first claim in each period of continuing sickness; for subsequent registration periods in the same period of continuing sickness, payments are made for all days of sickness over 4 whether or not consecutive. Unemployment benefits are paid for days of unemployment over 4. However, in the case of unemployment benefits due to a legal authorized strike, unemployment benefits are not paid until after a 14-day waiting period. Non-strikers unemployed due to an illegal strike must also serve a 14-day waiting period.

(Continued on next page.)

**Table 4: Unemployment and Sickness Programs, Financial Statistics**  
**January - March 2019 (In thousands)**  
**Cash Basis (Unaudited)**

Item	March 2019	February 2019	January 2019	October 2018 - March 2019	October 2017 - March 2018
<b>RAILROAD UNEMPLOYMENT INSURANCE ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$117,713	\$124,651	\$107,259	\$100,843	\$73,610
<b>Income, total</b>	505	1,368	26,207	56,706	55,725
Contributions <sup>1</sup>	-151	1,210	26,141	55,671	54,866
Interest on investments	573	12	1	1,139	1,176
Undistributed recoveries of benefit payments <sup>2</sup>	82	146	65	-104	-318
Transfers from RUI Administration Fund	.....	.....	.....	.....	.....
<b>Outgo, total</b>	7,162	8,307	8,815	46,493	56,142
Unemployment benefit payments <sup>3</sup>	3,706	3,304	3,674	17,141	23,911
Sickness benefit payments <sup>3</sup>	3,350	4,897	5,034	28,515	31,547
Funding for Office of Inspector General	106	106	106	836	684
<b>Balance at end of period</b>	111,056	117,713	124,651	111,056	73,194
<b>RAILROAD UNEMPLOYMENT INSURANCE ADMINISTRATION FUND</b>					
<b>Balance at beginning of period</b>	\$11,604	\$13,065	\$8,500	\$8,467	\$11,483
<b>Income, total</b>	237	312	6,335	12,557	11,478
Contributions <sup>1</sup>	191	312	6,335	12,468	11,272
Interest on investments	46	.....	.....	89	207
<b>Outgo, total</b>	1,772	1,772	1,771	10,956	7,017
Administrative expenses	1,772	1,772	1,771	10,956	7,017
Transfers to RUI Account	.....	.....	.....	.....	.....
<b>Balance at end of period</b>	10,068	11,604	13,065	10,068	15,944

<sup>1</sup> Amounts reflect quarterly re-allocation of contributions between the RUI Account and the RUI Administration Fund.

<sup>2</sup> Net of distributed amounts.

<sup>3</sup> In accordance with the Balanced Budget and Emergency Deficit Control Act of 1985, as amended by the Budget Control Act of 2011, amounts reflect a reduction of 7.3% under sequestration for days of unemployment and sickness after September 30, 2014, 6.8% for days after September 30, 2015, 6.9% for days after September 30, 2016, 6.6% for days after September 30, 2017, and 6.2% for days payable after September 30, 2018.

**NOTE**--(Continued from previous page.)

BENEFIT PAYMENTS are on a cash basis (unaudited) and represent amounts paid during the period including retroactive payments, less recoveries distributed to beneficiary accounts, refunds, and cancellations of previous payments.

ADMINISTRATION FUND balances reflect current adjustments to income and disbursements for previous years.

All unemployment and sickness data relate to CALENDAR MONTHS.

**Source: Bureau of Fiscal Operations**

**Detail may not add to totals shown because of rounding.**

**Table 5: Benefits and Beneficiaries -- March 2019**

**RETIREMENT - SURVIVOR**

<b>Total benefit payments - cash basis (unaudited)<sup>1</sup></b>	\$1,086,683,000
Regular and Supplemental benefits	1,085,203,000
Vested dual benefits	1,480,000

	<b>Number</b>	<b>Average</b>
<b>Total benefits being paid at end of month</b>	637,000	.....
Retired employees':		
Regular	261,000	\$2,823
Supplemental	119,000	42
Spouses' and divorced spouses'	148,000	1,060
Aged widows' and widowers'	83,000	1,755
Other benefits	27,000	1,138
<b>Total beneficiaries being paid at end of month</b>	509,000	.....

**UNEMPLOYMENT-SICKNESS**

	<b>Unemployment</b>	<b>Sickness</b>
<b>Benefit payments - cash basis (unaudited)<sup>1</sup></b>	\$3,706,000	\$3,350,000
<b>Beneficiaries</b>	2,800	4,300
<b>Average payment per week<sup>2</sup></b>	\$359	\$360

<sup>1</sup> Data provided by the Bureau of Fiscal Operations.

<sup>2</sup> In accordance with the Balanced Budget and Emergency Deficit Control Act of 1985, as amended by the Budget Control Act of 2011, amounts reflect a reduction of 6.8% under sequestration for days of unemployment and sickness after September 30, 2015, 6.9% for days after September 30, 2016, 6.6% for days after September 30, 2017, and 6.2% for days after September 30, 2018.