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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 **April - June 2019**

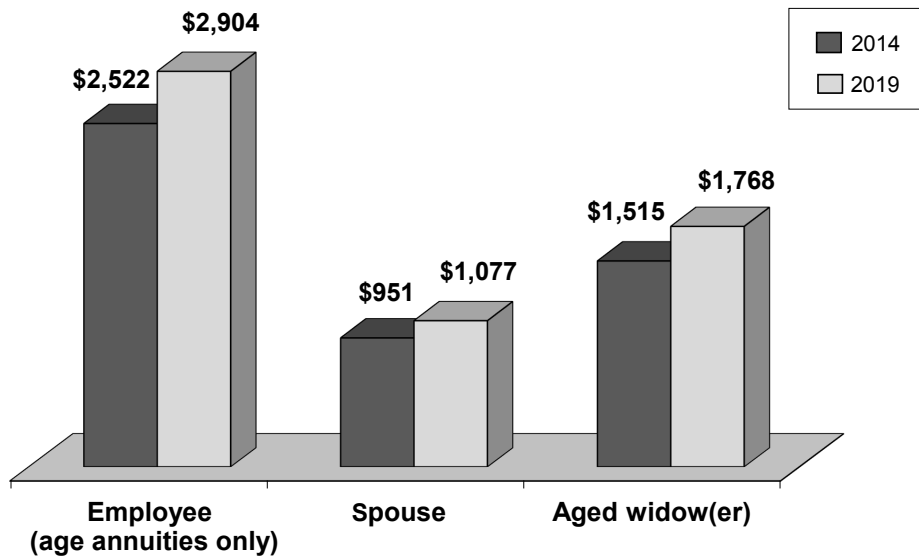
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**Average annuity amounts being paid,  
June 2014 and June 2019**



**Table 1: Retirement and Survivor Programs, Benefit Statistics**  
**April - June 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>								
June 2019	634,905	507,240	188,352	48,115	23,225	118,329	142,664	5,243
May 2019	635,587	507,733	188,503	48,028	23,454	118,505	142,659	5,227
April 2019	636,351	508,256	188,709	47,915	23,655	118,753	142,747	5,244
<b>Average amount in current-payment status at end of period</b>								
June 2019	.....	.....	\$2,904.36	\$2,556.25	\$2,815.87	\$41.51	\$1,077.16	\$682.36
May 2019	.....	.....	2,899.20	2,553.75	2,814.84	41.51	1,075.53	681.45
April 2019	.....	.....	2,896.87	2,551.16	2,814.42	41.51	1,074.68	681.84
<b>Number awarded during period</b>								
June 2019	2,285	1,999	573	.....	118	286	703	64
May 2019	2,051	1,855	511	.....	156	196	604	36
April 2019	2,267	2,081	513	.....	166	186	743	86
10/18 - 6/19	21,513	19,097	5,605	.....	1,277	2,416	6,737	561
10/17 - 6/18	23,297	20,325	6,238	.....	1,180	2,972	7,100	567
<b>Average amount awarded during period<sup>4</sup></b>								
June 2019	.....	.....	\$3,243.13	.....	\$2,975.69	\$40.71	\$1,076.39	\$748.13
May 2019	.....	.....	2,965.61	.....	2,835.01	39.68	1,110.21	640.85
April 2019	.....	.....	2,995.48	.....	2,850.68	40.31	1,039.47	691.41
<b>Benefit payments during period (thousands)<sup>5</sup></b>								
June 2019	\$1,089,321	.....	\$551,949	\$122,423	\$72,751	\$4,925	\$155,571	\$3,786
May 2019	1,084,161	.....	547,578	121,983	73,791	4,931	154,546	3,667
April 2019	1,085,596	.....	547,675	121,815	74,816	4,942	154,745	3,792
10/18 - 6/19	9,712,675	.....	4,901,210	1,082,143	670,000	44,686	1,382,592	33,071
10/17 - 6/18	9,503,674	.....	4,764,767	1,020,032	707,252	45,473	1,339,623	30,868

<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  
April - June 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>									
June 2019	82,482	3,300	577	2,792	9,773	8,024	.....	.....	2,007
May 2019	82,641	3,313	577	2,808	9,740	8,111	.....	.....	1,999
April 2019	82,778	3,321	575	2,823	9,721	8,112	.....	.....	1,976
<b>Average amount in current-payment status at end of period</b>									
June 2019	\$1,768.13	\$1,395.43	\$1,918.62	\$1,149.57	\$1,162.19	\$1,151.87	.....	.....	\$320.06
May 2019	1,764.53	1,390.99	1,922.98	1,147.34	1,159.85	1,156.72	.....	.....	319.59
April 2019	1,760.11	1,392.17	1,922.24	1,146.60	1,157.04	1,155.59	.....	.....	318.94
<b>Number awarded during period</b>									
June 2019	408	9	6	6	76	36	173	1	.....
May 2019	429	7	7	10	68	27	221	----	.....
April 2019	467	5	6	10	51	34	224	1	.....
10/18 - 6/19	3,843	71	70	81	556	296	1,642	3	.....
10/17 - 6/18	4,144	71	68	90	577	288	1,884	1	.....
<b>Average amount awarded during period<sup>4</sup></b>									
June 2019	\$2,303.66	\$1,830.68	\$1,471.78	\$1,363.50	\$1,308.16	\$1,615.50	\$890	\$1,535	.....
May 2019	2,292.93	1,416.65	1,221.83	1,229.90	1,302.07	1,447.01	944	----	.....
April 2019	2,331.83	1,410.00	1,621.51	1,097.90	1,148.96	1,488.30	957	1,111	.....
<b>Benefit payments during period (thousands)<sup>5</sup></b>									
June 2019	\$146,305	\$4,874	\$1,172	\$3,226	\$11,510	\$9,990	\$166	\$2	\$651
May 2019	146,309	4,776	1,175	3,255	11,433	9,845	216	----	635
April 2019	146,349	4,738	1,201	3,270	11,322	10,032	230	1	647
10/18 - 6/19	1,317,701	43,436	10,929	29,344	101,582	88,429	1,598	6	5,760
10/17 - 6/18	1,318,451	44,295	10,815	29,758	96,973	88,164	1,803	4	5,206

<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**  
**April - June 2019 (In thousands)**  
**Cash Basis (Unaudited)**

Item	June 2019	May 2019	April 2019	October 2018 - June 2019	October 2017 - June 2018
<b>RAILROAD RETIREMENT ACCOUNT</b>					
<b>Balance at beginning of period<sup>1</sup></b>	\$796,584	\$814,021	\$716,985	\$656,125	\$446,656
<b>Income, total</b>	423,911	610,215	725,177	5,573,757	5,621,243
Payroll taxes <sup>2</sup>	262,052	273,208	302,138	2,439,668	2,514,438
Income tax transfers <sup>3</sup>	.....	.....	100,000	370,000	311,000
Reimbursements for payment of SSA benefits	160,692	159,300	159,523	1,415,505	1,320,182
Transfers from National RR Investment Trust <sup>4</sup>	.....	176,000	162,000	1,337,000	1,464,000
Undistributed recoveries of benefit payments <sup>5</sup>	-3	76	-2	18	-47
Uncashed check credits from U.S. Treasury <sup>6</sup>	88	45	29	406	231
Interest on investments <sup>7</sup>	1,083	1,587	1,489	11,159	11,439
<b>Outgo, total</b>	631,742	627,652	628,141	5,641,129	5,455,303
Benefit payments	466,853	462,622	463,442	4,158,693	4,075,068
Payments of SSA benefits	159,698	159,202	159,508	1,413,858	1,317,582
Administrative expenses <sup>8</sup>	4,695	5,332	4,695	63,181	57,462
Funding for Office of Inspector General	496	496	496	5,397	5,191
<b>Balance at end of period<sup>1</sup></b>	588,753	796,584	814,021	588,753	612,595
<b>NATIONAL RAILROAD RETIREMENT INVESTMENT TRUST</b>					
<b>Cash and investment balance at end of period<sup>9</sup></b>	\$25,603,676	\$24,608,691	\$25,574,451	\$25,603,676	\$26,208,881
<b>DUAL BENEFITS PAYMENTS ACCOUNT<sup>10</sup></b>					
<b>Balance at beginning of period</b>	\$1,353	\$1,173	\$972	.....	.....
Congressional apportionments <sup>11</sup>	1,532	1,551	1,569	\$13,508	\$15,820
Income tax transfers <sup>3</sup>	.....	.....	.....	1,000	1,000
Vested dual benefit payments	1,497	1,371	1,369	13,119	15,407
<b>Balance at end of period</b>	1,388	1,353	1,173	1,388	1,414

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

Item	June 2019	May 2019	April 2019	October 2018 - June 2019	October 2017 - June 2018
<b>SOCIAL SECURITY EQUIVALENT BENEFIT ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$1,112,671	\$1,181,824	\$1,127,989	\$1,122,406	\$917,572
<b>Income, total</b>	5,558,101	553,302	676,685	10,492,850	10,507,161
Payroll taxes <sup>2</sup>	217,232	226,074	250,502	2,160,944	2,240,238
Income tax transfers <sup>3</sup>	.....	.....	67,000	194,000	210,000
Financial interchange advances <sup>12</sup>	392,351	325,100	357,040	3,172,743	3,097,802
RRB-SSA financial interchange transfer	4,946,429	.....	.....	4,946,429	4,942,425
Interest on investments <sup>7</sup>	2,089	2,128	2,143	18,734	16,696
<b>Outgo, total</b>	5,395,686	622,455	622,851	10,340,170	10,226,725
Benefit payments	620,971	620,168	620,786	5,540,862	5,413,200
Repayment of financial interchange advances <sup>12</sup>	4,202,365	.....	.....	4,202,365	4,194,311
RRB-CMS financial interchange transfer	570,285	.....	.....	570,285	596,547
Administrative expenses <sup>8</sup>	1,867	2,090	1,867	24,510	20,676
Funding for Office of Inspector General	197	197	197	2,148	1,991
<b>Balance at end of period</b>	1,275,085	1,112,671	1,181,824	1,275,085	1,198,008

<sup>1</sup>Balances include liabilities for uncashed checks. As of the end of June 2019, liabilities were \$15,194,000. <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 appropriation for fiscal year 2019 was \$19.0 million, including income tax transfers. The appropriation for fiscal year 2018 was \$22.0 million, including income tax transfers. <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  
April - June 2019**

Period	Normal benefit accounts			Beneficiaries		
	Applications received	Opened	Exhausted	Total	Normal benefits	Extended benefits
<b>Unemployment</b>						
June 2019	2,842	441	126	2,205	1,996	267
May 2019	691	538	147	2,234	1,952	333
April 2019	746	446	172	2,534	2,047	567
7/18 - 6/19	12,215	7,031	1,744	7,865	7,767	1,011
7/17 - 6/18	12,517	8,509	2,081	9,317	9,227	1,094
<b>Sickness</b>						
June 2019	1,155	728	196	3,596	3,144	557
May 2019	1,110	856	280	3,929	3,257	842
April 2019	1,189	838	308	4,257	3,319	1,114
7/18 - 6/19	17,927	13,765	2,994	14,351	14,201	2,208
7/17 - 6/18	19,628	20,640	3,507	15,689	15,529	2,533

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>						
June 2019	3,857	3,359	498	8.9	\$355.45	\$2,063
May 2019	4,279	3,653	626	8.8	355.55	2,642
April 2019	4,675	3,585	1,090	8.7	356.60	3,131
7/18 - 6/19	52,326	46,483	5,843	9.0	358.20	31,651
7/17 - 6/18	62,989	56,631	6,358	9.0	334.40	40,880
<b>Sickness</b>						
June 2019	6,668	5,596	1,072	8.8	\$358.20	\$2,104
May 2019	7,967	6,248	1,719	8.7	358.55	4,241
April 2019	8,572	6,204	2,368	8.7	358.75	3,453
7/18 - 6/19	102,104	89,509	12,595	8.8	362.15	50,742
7/17 - 6/18	114,956	100,475	14,481	8.8	338.25	56,174

<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 after September 30, 2014, 6.8% for days after September 30, 2015, 6.9% for days after September 30, 2016, 6.6% for days payable 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**  
**April - June 2019 (In thousands)**  
**Cash Basis (Unaudited)**

Item	June 2019	May 2019	April 2019	October 2018 - June 2019	October 2017 - June 2018
<b>RAILROAD UNEMPLOYMENT INSURANCE ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$132,047	\$128,643	\$111,056	\$100,843	\$73,610
<b>Income, total</b>	-78	10,393	24,277	91,298	94,428
Contributions <sup>1</sup>	-162	710	24,326	80,545	81,920
Interest on investments	9	159	21	1,328	1,930
Undistributed recoveries of benefit payments <sup>2</sup>	76	-150	-71	-250	-630
Transfers from RUI Administration Fund <sup>3</sup>	.....	9,674	.....	9,674	11,208
<b>Outgo, total</b>	4,273	6,989	6,689	64,445	74,699
Unemployment benefit payments <sup>4</sup>	2,063	2,642	3,131	24,978	31,202
Sickness benefit payments <sup>4</sup>	2,104	4,241	3,453	38,312	42,455
Funding for Office of Inspector General	106	106	106	1,155	1,043
<b>Balance at end of period</b>	127,696	132,047	128,643	127,696	93,340
<b>RAILROAD UNEMPLOYMENT INSURANCE ADMINISTRATION FUND</b>					
<b>Balance at beginning of period</b>	\$5,788	\$15,613	\$10,068	\$8,467	\$11,483
<b>Income, total</b>	232	-2	6,549	19,336	17,955
Contributions <sup>1</sup>	203	131	6,549	19,351	17,844
Interest on investments <sup>3</sup>	29	-133	.....	-15	112
<b>Outgo, total</b>	1,001	9,823	1,005	22,785	24,104
Administrative expenses	1,001	149	1,005	13,110	12,896
Transfers to RUI Account <sup>3</sup>	.....	9,674	.....	9,674	11,208
<b>Balance at end of period</b>	5,018	5,788	15,613	5,018	5,334

<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 Section 11(d) of the Railroad Unemployment Insurance Act, \$9,674,000 was transferred from the RUI Administration Fund to the RUI Account in May 2019. The transfer represents the amount in the RUI Administration Fund in excess of \$6 million (on an accrual basis of accounting) at the end of fiscal year 2018. The attributable interest of \$133,000 was also transferred in May 2019.

<sup>4</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 payable 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.

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

## Table 5: Benefits and Beneficiaries -- June 2019

### RETIREMENT - SURVIVOR

<b>Total benefit payments - cash basis (unaudited)<sup>1</sup></b>	\$1,089,321,000
Regular and Supplemental benefits	1,087,824,000
Vested dual benefits	1,497,000

	<b>Number</b>	<b>Average</b>
<b>Total benefits being paid at end of month</b>	635,000	.....
Retired employees':		
Regular	260,000	\$2,832
Supplemental	118,000	42
Spouses' and divorced spouses'	148,000	1,063
Aged widows' and widowers'	82,000	1,768
Other benefits	26,000	1,139
<b>Total beneficiaries being paid at end of month</b>	507,000	.....

### UNEMPLOYMENT-SICKNESS

	<b>Unemployment</b>	<b>Sickness</b>
<b>Benefit payments - cash basis (unaudited)<sup>1,2</sup></b>	\$2,063,000	\$2,104,000
<b>Beneficiaries</b>	2,200	3,600
<b>Average payment per week<sup>2</sup></b>	\$355	\$358

<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 6.9% under sequestration for days of unemployment and sickness after September 30, 2016, 6.6% for days after September 30, 2017, and 6.2% for days after September 30, 2018.