

**UNITED STATES GOVERNMENT
ORDER FORM
FS FORM 7600B**



Agreement Between Federal Program Agencies for Intragovernmental Reimbursable, Buy/Sell Activity.

In accordance with TFM Volume 1, Part 2, Chapter 4700, Appendix 8.

<https://www.fiscal.treasury.gov/g-invoice>

G-Invoicing Required Fields have an (*)

NEW OR MODIFIED ORDER			
1.	*Order Number	Order Number: O2410-028-011-039179	
		Order Modification Number: 0	
2.	Order Status	Open	
3.	*General Terms & Conditions (GT&C) Number	A2408-028-011-066587	
4.	*Order Create Date	10/02/2024	
PARTNER INFORMATION			
5.	*Assisted Acquisition Indicator	No	
6.	*Period of Performance	Start Date: 10/01/2024	End Date: 09/30/2025
		Requesting Agency (Buyer)	Servicing Agency (Seller)
7.	*Agency Location Code (ALC)	28040001	11030001
8.	*Agency Name	SOCIAL SECURITY ADMINISTRATION - HQ - DIV. OF CENTRAL ACCTING OPERATIONS	EXECUTIVE OFFICE OF THE PRESIDENT - OFFICE OF ADMINISTRATION, OCFO
9.	Group Name	DCS IAA	United States Digital Services
10.	Cost Center		
11.	Business Unit		
12.	Department ID		
13.	Order Tracking Number	USDS-25-0003	SPEI25S007XXX
14.	Unique Entity ID		
15.	Funding Office Code (Buyer Only)		
16.	Funding Agency Code (Buyer Only)		

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17.	Comments	Within G-Invoicing, SSA may use Representative Approvers to ministerially approve agreements. Please refer to the Approved PDF Agreement in the attachment section of this Order for SSA's official approval.	USDS OMB / SSA / RWA for CX modernization.
AUTHORITY INFORMATION			
18.	*Statutory Authority Fund Type Code	Economy Act	
19.	Statutory Authority Fund Type Title	Economy Act	
20.	Statutory Authority Fund Type Citation	31 U.S.C. 1535	
		Requesting Agency (Buyer)	Servicing Agency (Seller)
21.	Program Authority Title		
22.	Program Authority Citation		
ADVANCE INFORMATION			
(Required by Servicing Agency if there is an advance.)			
23.	Advance Revenue Recognition Methodology	Other	
24.	Advance Revenue Recognition Description (required if "Other")	Billed in Advance pursuant to OMB Circular A-11, Section 130.21.	
25.	Advance Payment Authority Title	Economy Act	
26.	Advance Payment Authority Citation	31 USC 1535	
27.	Total Advance Amount	\$4,538,750.00	
DELIVERY INFORMATION			
(Requesting Agency completes this section.)			
28.	*FOB Point	Destination	
29.	Constructive Receipt Days	30 (Calendar Days) *Required if Destination/Other is checked on FOB Point Line.	
30.	Acceptance Point	Destination	
31.	Place of Acceptance		
32.	Inspection Point	Destination	
33.	Place of Inspection		
ORDER BILLING			
(Servicing Agency completes this section.)			
34.	*Billing Frequency	Other	
35.	Billing Frequency Explanation	Upon IPAC.	

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ORDER BILLING

(Requesting Agency completes this section.)

36.	Priority Order Indicator	No
37.	Capital Planning and Investment control (CPIC)	No

LINE ITEM

L1		*Line Number	1
L1		Order Line Status	Active
L1		*Item Code	9999
L1		*Item Description	Miscellaneous Items
L1		*Line Costs Unit of Measure (UOM)	DO
L1		*Unit of Measure Description	Dollars, U.S.
L1		Total Line Costs	\$3,803,750.00
L1		Order Line Advance Amount	\$3,803,750.00
L1		Product/Service Identifier	
L1		*Capitalized Asset Indicator	False
L1		Item UID Required Indicator	
L1		*Type of Service Requirements	Severable

SCHEDULE SUMMARY

L1	S1	*Schedule Number	1
L1	S1	Advance Pay Indicator	Yes
L1	S1	*Cancel Status (schedule)	Active
L1	S1	*Schedule Unit Cost/Price	\$1.00
L1	S1	*Order Schedule Quantity	3,803,750.00
L1	S1	Order Schedule Amount	\$3,803,750.00

SCHEDULE FUNDING INFORMATION

			Requesting Agency (Buyer)								Servicing Agency (Seller)							
L1	S1	*Agency TAS	SP	ATA	AID	BPOA	EPOA	A	MAIN	SUB	SP	ATA	AID	BPOA	EPOA	A	MAIN	SUB
					028	2025	2025		8704	000			011	2025	2025		0036	000
L1	S1	*Agency Business Event Type Code	DISNGF								COLL							

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L1	S1	Object Class Code	25.3	25.3
L1	S1	Additional Accounting Classification		
L1	S1	*Description of Products and/or Services including Bona Fide Need for this order (Buyer Only)	SSA require digital expertise to modernize the critical processes that support the administration of the Social Security program.	

SLOA INFORMATION

*To capture Agency Internal Accounting

			Requesting Agency (Buyer)	Servicing Agency (Seller)
L1	S1	Accounting Classification Reference Number		
L1	S1	Reimbursable Flag		Reimbursable
L1	S1	Federal Award Identifier Number (FAIN)		
L1	S1	Unique Record Identifier (URI)		
L1	S1	Activity Address		
L1	S1	Budget Line Item		
L1	S1	Budget Fiscal Year	2025	
L1	S1	Security Cooperation (FMS)		
L1	S1	Security Cooperation Implementing Agency Code		
L1	S1	Security Cooperation Case Line Item Identifier		
L1	S1	Sub-Allocation		
L1	S1	Agency Accounting Identifier		
L1	S1	Funding Center Identifier	4001500	
L1	S1	Cost Center Identifier		
L1	S1	Project Identifier	PID 10258	
L1	S1	Activity Identifier	S4C-8	
L1	S1	Disbursing Identifier		
L1	S1	Cost Element Code		
L1	S1	Work Order Number		
L1	S1	Functional Area		

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L1	S1	Agency Security Cooperation Case Designator		
L1	S1	Parent Award Identifier (PAID)		
L1	S1	Procurement Instrument Identifier (PIID)		

SCHEDULE SHIPPING INFORMATION

(Requesting Agency completes this section.)

L1	S1	Ship To Address Identifier	
L1	S1	Ship To Agency Title	
L1	S1	Address 1	
L1	S1	Address 2	
L1	S1	Address 3	
L1	S1	Ship To City	
L1	S1	Ship To Postal Code	
L1	S1	Ship To State	
L1	S1	Ship To Country	
L1	S1	Ship To Location Description	
L1	S1	Delivery/Shipping Information for Product Special Shipping Information	
L1	S1	Delivery/Shipping POC Name	
L1	S1	Delivery/Shipping Information for Product POC Title	
L1	S1	Delivery/Shipping Information for Product POC E-mail Address	
L1	S1	Delivery/Shipping Information for Product POC Telephone Number	

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L1	S1	Agency Additional Information	<p>Subject to the Availability of Funds.</p> <p>The parties agree that if the Federal Government is operating under a continuing resolution (CR), the amount obligated under this agreement will only be available to cover the services performed and expenses incurred through the period of the CR. SSA's ability to obligate funds for services beyond the expiration of the CR is subject to the availability of funds in the subsequent funding measure for that fiscal year. When an annual appropriation act provides sufficient funding for an appropriation account to cover obligations incurred under the authority of the CR, any unpaid obligations will be charged to and paid from the applicable account established under the annual appropriation act.</p>
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LINE ITEM

L2		*Line Number	2
L2		Order Line Status	Active
L2		*Item Code	9999
L2		*Item Description	Overhead Fees
L2		*Line Costs Unit of Measure (UOM)	DO
L2		*Unit of Measure Description	Dollars, U.S.
L2		Total Line Costs	\$735,000.00
L2		Order Line Advance Amount	\$735,000.00
L2		Product/Service Identifier	
L2		*Capitalized Asset Indicator	False
L2		Item UID Required Indicator	
L2		*Type of Service Requirements	Severable

SCHEDULE SUMMARY

L2	S1	*Schedule Number	1
L2	S1	Advance Pay Indicator	Yes
L2	S1	*Cancel Status (schedule)	Active
L2	S1	*Schedule Unit Cost/Price	\$1.00

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L2	S1	*Order Schedule Quantity	735,000.00															
L2	S1	Order Schedule Amount	\$735,000.00															
SCHEDULE FUNDING INFORMATION																		
			Requesting Agency (Buyer)								Servicing Agency (Seller)							
L2	S1	*Agency TAS	SP	ATA	AID	BPOA	EPOA	A	MAIN	SUB	SP	ATA	AID	BPOA	EPOA	A	MAIN	SUB
					028	2025	2025		8704	000			011	2025	2025		0036	000
L2	S1	*Agency Business Event Type Code	DISNGF								COLL							
L2	S1	Object Class Code	25.3								25.3							
L2	S1	Additional Accounting Classification																
L2	S1	*Description of Products and/or Services including Bona Fide Need for this order (Buyer Only)	SSA require digital expertise to modernize the critical processes that support the administration of the Social Security program.															
SLOA INFORMATION																		
*To capture Agency Internal Accounting																		
			Requesting Agency (Buyer)								Servicing Agency (Seller)							
L2	S1	Accounting Classification Reference Number																
L2	S1	Reimbursable Flag									Reimbursable							
L2	S1	Federal Award Identifier Number (FAIN)																
L2	S1	Unique Record Identifier (URI)																
L2	S1	Activity Address																
L2	S1	Budget Line Item																
L2	S1	Budget Fiscal Year	2025															
L2	S1	Security Cooperation (FMS)																
L2	S1	Security Cooperation Implementing Agency Code																
L2	S1	Security Cooperation Case Line Item Identifier																
L2	S1	Sub-Allocation																
L2	S1	Agency Accounting Identifier																
L2	S1	Funding Center Identifier	4001500															

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L2	S1	Cost Center Identifier		
L2	S1	Project Identifier	PID 10258	
L2	S1	Activity Identifier	S4C-8	
L2	S1	Disbursing Identifier		
L2	S1	Cost Element Code		
L2	S1	Work Order Number		
L2	S1	Functional Area		
L2	S1	Agency Security Cooperation Case Designator		
L2	S1	Parent Award Identifier (PAID)		
L2	S1	Procurement Instrument Identifier (PIID)		

SCHEDULE SHIPPING INFORMATION

(Requesting Agency completes this section.)

L2	S1	Ship To Address Identifier	
L2	S1	Ship To Agency Title	
L2	S1	Address 1	
L2	S1	Address 2	
L2	S1	Address 3	
L2	S1	Ship To City	
L2	S1	Ship To Postal Code	
L2	S1	Ship To State	
L2	S1	Ship To Country	
L2	S1	Ship To Location Description	
L2	S1	Delivery/Shipping Information for Product Special Shipping Information	
L2	S1	Delivery/Shipping POC Name	
L2	S1	Delivery/Shipping Information for Product POC Title	
L2	S1	Delivery/Shipping Information for Product POC E-mail Address	
L2	S1	Delivery/Shipping Information for Product POC Telephone Number	

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			Requesting Agency (Buyer)	Servicing Agency (Seller)
L2	S1	Agency Additional Information	<p>Subject to the Availability of Funds.</p> <p>The parties agree that if the Federal Government is operating under a continuing resolution (CR), the amount obligated under this agreement will only be available to cover the services performed and expenses incurred through the period of the CR. SSA's ability to obligate funds for services beyond the expiration of the CR is subject to the availability of funds in the subsequent funding measure for that fiscal year. When an annual appropriation act provides sufficient funding for an appropriation account to cover obligations incurred under the authority of the CR, any unpaid obligations will be charged to and paid from the applicable account established under the annual appropriation act.</p>	

CLOSE ORDER

38.	Closing Date	
	Closing Comments	

REJECT ORDER

39.	Reject Date	10/02/2024
	Reject Comments	Please update to include two lines, one for direct costs and the second for overhead costs.

AGENCY POINTS OF CONTACTS (POC)

		Requesting Agency (Buyer)	Servicing Agency (Seller)
40.	*Agency POC Name	Sheree Myers	Ariana Tuckey
	*Agency POC E-mail	██████████@ssa.gov	██████████@omb.eop.gov
	*Agency POC Phone No	██████████	██████████
	Agency POC Fax No		

AGREEMENT APPROVALS**Funding Official**

The Funds Approving Officials, as identified by the Requesting Agency and Servicing Agency, certify that the funds are accurately cited and can be properly accounted for per the purposes set forth in the Order. The Requesting Agency Funding Official signs to obligate funds. The Servicing Agency Funding Official signs to start the work, and to bill, collect, and properly account for funds from the Requesting Agency, in accordance with the agreement.

		Requesting Agency (Buyer)	Servicing Agency (Seller)
41.	*Funding Official Name	Natalia Maltsev	BRIAN GILLIS
	*Signature	Electronic Approval On File	Electronic Approval On File
	Funding Official Title	Representative Approver on behalf of Marcela Escobar-Alava	Budget Officer

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	*Funding Official E-mail	██████████@ssa.gov	██████████@omb.eop.gov
	*Funding Official Phone No	██████████	██████████
	Funding Official Fax No		
	Funding Official Date Signed	10/02/2024	10/09/2024

Program Official

The Program Officials, as identified by the Requesting Agency and Servicing Agency, must ensure that the scope of work is properly defined and can be fulfilled for this order. The Program Official may or may not be the Contracting Officer depending on each agency's IAA business process.

		Requesting Agency (Buyer)	Servicing Agency (Seller)
42.	*Program Official Name	Natalia Maltsev	SARAH SPOONER
	*Signature	Electronic Approval On File	Electronic Approval On File
	Program Official Title	Representative Approver on behalf of Marcela Escobar-Alava	AD MOD
	*Program Official E-mail	██████████@ssa.gov	██████████@omb.eop.gov
	*Program Official Phone No	██████████	██████████
	Program Official Fax No		
	Program Official Date Signed	10/02/2024	10/09/2024

AGENCY PREPARER INFORMATION

		Requesting Agency (Buyer)	Servicing Agency (Seller)
43.	*Name	██████████	██████████
	*Phone No	██████████	██████████
	*E-mail Address	██████████@ssa.gov	██████████@omb.eop.gov

ATTACHMENTS

Name	File Alias	Uploaded By	Date/Time
7600B USDS- 25-0003 - 9.30.202 4.pdf		██████████	10/02/2024 11:44 AM



Executive Office of the President
Office of Management and Budget
U.S. Digital Service



Terms and Conditions for Reimbursable Work

Social Security Administration

BACKGROUND

This document establishes the Terms and Conditions for reimbursable work by the United States Digital Service (USDS) of the Office of Management (OMB), for the Social Security Administration (SSA). When referred to collectively, USDS and SSA are referred to as the “Parties.”

USDS was created in August 2014 as a new unit within OMB to fundamentally change the way the Federal Government buys, builds, and deploys technology and digital services to the public. Since then, USDS has recruited and hired more than 700+ top-notch technologists, including designers, engineers, product managers, data scientists, to help tackle the most challenging technology implementation problems across the government, while simultaneously building capacity within agencies. This collaborative approach fosters sustainable growth and resilience, enabling agencies to adapt effectively to the constantly evolving technological landscape.

USDS hires individuals for two-year, term-limited positions using a “tour of duty” model that emphasizes flexibility and dynamic project engagement. USDS employees are regularly detailed to agencies for specific projects and then back to USDS, to be detailed to another agency as needed. Consequently, the number of USDS employees detailed to SSA may fluctuate throughout the year, reflecting changes in hiring dynamics and evolving project requirements.

Social Security provides financial protection for the nation’s people, supporting Americans throughout all of life’s journeys. SSA administers retirement, disability, survivor, and family benefits, and enrolls individuals in Medicare. SSA also provides Social Security Numbers, which are unique identifiers needed to work, handle financial transactions, and determine eligibility for certain government services. SSA is headed by a Commissioner and has a staff of almost 60,000 employees. SSA’s central office is located in Baltimore, Maryland. The field organization, which is decentralized to provide services at the local level, includes 10 regional offices, 6 processing centers, and approximately 1,230 field offices. There are 2 additional processing centers in the central office.

PURPOSE

These Terms and Conditions establish a collaborative framework between USDS and SSA, cultivating a partnership to harness technology and design to deliver better Government services to the American public. This agreement documents the detail of a team of USDS employees to SSA on a reimbursable basis. Through this agreement, USDS aims to deploy its expertise in digital strategy, design, and agile methodologies to assist SSA in modernizing its systems and enhancing customer experiences, with the understanding that providing USDS with flexibility across operational aspects is pivotal in enabling the SSA to effectively fulfill its mission on a broader scale.

AUTHORITY

This agreement is authorized by: The Economy Act, 31 U.S.C. § 1535, which provides that an agency may place an order with a major organizational unit within the same agency or another agency for goods or services if: (A) amounts are available; (B) the ordering agency decides the order is in the best interest of the United States Government; (C) the agency to fill the order is able to provide or get by contract the ordered goods or services; and (D) the agency decides ordered goods or services cannot be provided by contract as conveniently or cheaply by a commercial enterprise (payments must be made on the basis of the actual cost of goods or services provided).

PERIOD OF AGREEMENT

The terms and conditions described are effective from October 1, 2024, through September 30, 2025, subject to the availability of appropriations. The parties may extend this agreement through a written, signed modification. The USDS employees will work for SSA for an estimated 40 hours per week during the period of the agreement.

SCOPE OF WORK

USDS will collaborate with the SSA CIO and Chief Transformation Officer in the placement of the USDS detailees at SSA. The USDS Administrator and USDS SSA Team Lead will discuss projects and the overall engagement with the SSA Chief Information Officer (CIO) and Chief Transformation Officer (CTrO) on an as needed basis and may adjust staffing allocations with the written agreement of SSA.

During their detail, the USDS employees will serve as Digital Service Experts, with a team size equivalent to up to 15 FTEs. The detailees will support the design, delivery and implementation of customer-experience (CX) focused modernization initiatives which may include, but are not limited to, the following:

- Provide leadership and technical execution of best practices in service design and delivery of SSA services.
- Work across SSA components to implement the approach of discovery, prioritization, and piloting of new/updated services in moving towards an omnichannel experience for customers and SSA employees.
- Build a foundation of improved data analysis (MI and BI) and meaningful understanding of SSA systems towards a data-informed modernization strategy.
- Assist with increasing technology talent at SSA to sustain efforts launched by USDS and promote human-centered design methodology for addressing internal and external priorities.
- Work with SSA to assist on projects and infrastructure. Liaise with stakeholders to set priorities, resolve issues, and ensure the design and delivery of best-in-class digital services to SSA and its users.
- Support the use of modern product management, design, data science, procurement, and engineering methodologies to further the modernization of SSA information technology (IT) and digital services.
- Provide technical and subject matter leadership to SSA to acquire shared tools and services to address technical issues, and CX as well as employee experience (EX) challenges.
- Give advice and instruction to SSA personnel on digital service solutions and IT needs, business processes, and policy.
- Adapt policies, goals, and objectives and establish short, intermediate, and long-range plans to anticipate and meet mission objectives.
- Consult and conduct research with customers and SSA employees to evaluate adaptability of services and recommend proposals for system changes.
- Coordinate IT program activities with stakeholders, ensuring seamless integration of program elements with ongoing policy, leadership, and service delivery operations.

- Design and implement solutions to process address changes in SSA systems more efficiently and seamlessly for customers and SSA employees.
- Engage in communication and outreach to appropriate internal and external organizations.
- Transfer knowledge, implement best practices in technology and project management, and assist SSA in the recruiting and hiring of technologists to ensure sustainable improvements long after the detailees' direct involvement ends.
- Assist with building digital services capacity at SSA by providing technical and subject-matter expertise in hiring initiatives.

FUNDING

This Terms and Conditions document does not constitute an obligation of funds by either Party. The work to be performed is funded by a separate Inter-Agency Agreement between USDS/OMB and SSA. USDS is seeking reimbursement for up to 15 FTEs, with projected costs outlined in the accompanying chart. This breakdown includes salaries and benefits and travel costs, and an applied overhead rate of 20 percent¹ to ensure the efficient deployment of the team and the sustainment of necessary tools. USDS will conduct quarterly reconciliations to update the list of employees covered under this agreement, along with any required financial data. These reviews will reflect staffing adjustments inherent to USDS's "tour of duty" model. USDS will promptly backfill departing staff to maintain operational continuity and ensure uninterrupted progress on project work. However, in the event that there is a delay in backfilling departing staff, these reviews will identify potential underburn, and any unexpended resources will be promptly returned to SSA.

Line Item	Amount
Salaries & Benefits	\$3,675,000
Travel	\$150,000
User Research Participant Incentives	\$3,750
Overhead	\$735,000
Total	\$4,538,750

ADDITIONAL TERMS

All parties acknowledge:

- Detailees will maintain coverage under Federal retirement, group health benefits, and life insurance during the detail; detailees' shares of costs for such coverage continue to be withheld from salary.
- Detailees will continue to accrue annual and sick leave.
- SSA will provide new e-mail account information and any necessary devices for work performed in support of SSA.
- The Executive Office of the President will maintain existing email account information and any necessary devices to allow detailees to retain access to their OMB e-mail, tools, and assets.
- The USDS team will operate in a remote and hybrid mode with travel for onsite work, research, and collaboration as needed.

¹ Overhead is calculated using the portion of USDS's full indirect costs that are necessary to support projects. The indirect costs used in the calculation are the actual costs from the most recently completed fiscal year.

- The USDS team, led by the Team Lead, will function as a unified cooperative, and define projects in collaboration with SSA.
- The USDS team reserves the right to abstain from a project after discussions and alignment with SSA.
- This agreement is strictly for internal management purposes for each of the parties. This agreement shall not be construed to provide a private right or cause of action for or by any person or entity.

OMB/USDS will:

- Maintain personnel records for the detailees, including official time and attendance and formal annual and mid-year performance evaluations as applicable, per OMB/USDS policy.
- Manage detailees' leave requests. Leave requests by the detailees will be made to and recorded by USDS. Detailees will communicate leave with the relevant SSA stakeholders and executives to ensure business continuity.
- Maintain the employees' security clearance.
- For administrative purposes, continue to be the supervisor of record for the USDS employees, to include maintaining their official time and attendance records.
- Promptly notify and coordinate with SSA and SSA Office of General Counsel if any work in this matter becomes the subject of a request for information (such as under the Freedom of Information Act or by the media) or any oversight inquiry from, for example, a Congressional committee, any federal Office of Inspector General, or the Government Accountability Office (GAO).

SSA will:

- Provide all necessary identification to allow access and communications in a priority manner, to include badges, phones, e-mail account, computers, network access, and permissions for detailees to complete work for SSA. This access includes enabling the employee to access and store SSA sensitive data on SSA networks. For each detailee, this includes a laptop computer or ThinClient that connects to the SSA IT network and an SSA email address.
- Ascertain and mitigate any conflicts of interest or confidentiality protocols during the detail.
- Provide written input for the detailees' performance evaluations and other feedback, as applicable.
- Provide technical and operational support to the detailees for all SSA activities related to this detail.
- Cover any travel or training expenses required by SSA to achieve the detail objectives.
- Maintain records for the employee, including all project-related documents that must be maintained pursuant to the Federal Records Act and SSA policy.
- Create a process by which SSA will: (1) review any final project-related documents created by the detailees that may contain legally protected PII, and (2) inform the detailees of any information in those documents that SSA considers legally protected.
- Promptly notify and coordinate with USDS and OMB's Office of General Counsel if the detailees' work in this matter becomes the subject of a request for information (such as under the Freedom of Information Act or by the media) or any oversight inquiries from, for example, a Congressional committee, any federal Office of Inspector General, or the Government Accountability Office (GAO).

Detailees will:

- Complete work identified in this agreement.
- In performing work for SSA, function under the guidance and support of the SSA CIO and CTRo. Detailees will remain under the administrative control of the USDS supervisor.
- Advise the USDS timekeeper of any leave taken during the detail.
- The Executive Office of the President will maintain existing email account information and any necessary devices to allow detailees to retain access to their OMB e-mail, tools, and assets.

- For PII and sensitive SSA records, refrain from using their OMB e-mail accounts, phones, information, and records during the detail consistent with OMB's Acceptable Use Policy and Records Policy and the PITS User Agreement, attached.
- Complete OMB's mandatory records management training at <https://eop.usalearning.net/>, certify completion by e-mailing a copy of the certificate of completion to [REDACTED] in the Management and Operations Division, and attend a briefing by [REDACTED] prior to OMB's signing this agreement.
- Within 30 days of beginning work for SSA, attend a briefing by SSA on SSA records management policies and practices and any other required training specific to the employees' duties.
- In performing work for SSA, follow all SSA information security, records, and related requirements, such as any requirements specified in SSA information security training and rules of behavior agreements.
- Appropriately mark as "PREDECISIONAL/DELIBERATIVE/PRIVILEGED" documents created by them under this agreement that contain opinions, analysis, or ideas exchanged as part of a process that might lead to a final policy or operational decision by SSA.

SSA acknowledges that:

- Any opinions, recommendations, reports, summaries, or other work product provided by the USDS employee to SSA as part of this engagement will not have been reviewed or approved by OMB offices or officials outside USDS. Such work product therefore will not represent a final or official position of OMB as to any question of law or policy.
- SSA has the ultimate authority and responsibility to make decisions regarding acquisition of services for SSA and to make legal determinations relevant thereto. Any opinions, recommendations, or other views expressed by the USDS employee to SSA on that subject are, therefore, necessarily pre-decisional and deliberative.

SECURITY CLEARANCE

This agreement is contingent upon the successful adjudication and receipt of any security clearances for the employee required by SSA.

CONTACT INFORMATION

SSA POC		USDS POC	
NAME	Betsy Beaumon	NAME	Erica Evans
ADDRESS	Social Security Administration 6401 Security Blvd Baltimore, MD 21235	ADDRESS	U.S. Digital Service, OMB, EOP 736 Jackson Place Washington DC 20503
EMAIL	[REDACTED]@ssa.gov	EMAIL	[REDACTED]@omb.eop.gov
PHONE		PHONE	[REDACTED]

Amendment to the Terms and Conditions for Reimbursable Work USDS and SSA

PURPOSE

This Amendment modifies and supplements the attached Terms and Conditions for Reimbursable Work (“Agreement”) between the Social Security Administration (“SSA”) and the United States DOGE Service (“USDS”), formerly the United States Digital Service, effective October 1, 2024, to the extent specified herein. This Amendment shall be effective on February 19, 2025.

MODIFICATION OF TERMS

The Parties agree to modify the terms of the Agreement as follows:

1. The “Period of Agreement” shall be modified to reflect that the agreement expires on July 4, 2026. The statement that USDS employees shall work “for an estimated 40 hours per week” for SSA shall be modified to state that they shall work for SSA “as needed.”
2. The bullet in “Additional Terms” stating “The USDS team will operate in a remote and hybrid mode with travel for onsite work, research, and collaboration as needed.” is hereby deleted.
3. The bullet in “Additional Terms” stating “The USDS team, led by the Team Lead, will function as a unified cooperative, and define projects in collaboration with SSA.” is hereby deleted.
4. The phrase “OMB” is struck and modified as necessary to reflect that USDS is no longer located within OMB.
 - Maintain personnel records for the detailees, including official time and attendance and formal annual and mid-year performance evaluations as applicable, per OMB/USDS policy.
5. This sentence: “For PII and sensitive SSA records, refrain from using their OMB e-mail accounts, phones, information, and records during the detail consistent with OMB’s Acceptable Use Policy and Records Policy and the PITC User Agreement, attached.” is modified as follows:
 - “For PII and other sensitive SSA records, refrain from using their USDS or other non-SSA e-mail accounts, computers, phones, or other assets during the detail.”
6. This sentence: “Complete OMB’s mandatory records management training at <https://eop.usalearning.net/>, certify completion by e-mailing a copy of the certificate of completion to Andrea Shahmohammadi in the Management and Operations Division, and attend a briefing by Ms. Shahmohammadi prior to OMB’s signing this agreement.” is modified as follows:
 - “Complete mandatory records management training and any other records, ethics, cyber, or related briefing or training as specified by the SSA Commissioner or his or her designee.”

7. Each use of the phrase “OMB” in the paragraph beginning “SSA acknowledges that” is hereby struck and replaced with the phrase “USDS”.

SUPPLEMENTAL TERMS

Notwithstanding the terms of the Agreement, the Parties agree to the following:

1. In addition to reimbursable details, details may also be on a non-reimbursable basis for unpaid employees. The legal authority for any non-reimbursable details arises from decisions of the Comptroller General setting forth exceptions to the general rule that a non-reimbursable detail between Federal agencies constitutes a violation of the Purpose Statute (31 U.S.C. § 1301) by the loaning agency and an improper augmentation of appropriated funds by the gaining agency. Specifically, the Comptroller General recognizes the following two exceptions allowing non-reimbursable details: (1) “where they involve a matter similar or related to matters ordinarily handled by the loaning agency and will aid the loaning agency in accomplishing a purpose for which its appropriations are provided,” or (2) details that have a negligible impact on the loaning agency’s appropriations. See HHS Detail of Office of Community Services Employees, B-211373 (Mar. 20, 1985).
2. The Scope of Work also includes, but is not limited to, increasing efficiency and the modernization of SSA IT infrastructure and systems, and detecting waste, fraud, and abuse.
3. Detailees will:
 - Report to and be supervised by the Commissioner of the Social Security Administration or his or her designee when performing SSA work. In all circumstances, Detailees will comply with all instructions, rules, regulations, and restrictions of the supervising agency.
 - Not knowingly take any actions that undermine SSA’s responsibilities under governing statutes, regulations, or directives, including but not limited to FISMA, FITARA, the Privacy Act, the Federal Acquisition Regulation, and the Trade Secrets Act.
 - Not knowingly take any measures that create cybersecurity risks to SSA systems.
 - Not knowingly access SSA systems in a manner that fails to comply with all relevant federal, security, ethics, and confidentiality laws, regulations, and policies, including SSA records management and information security requirements.
 - Not access, or attempt to access, classified information without proper security clearance.
 - Access SSA data, information, and systems for only legitimate purposes, including but not limited to IT modernization, the facilitation of SSA operations, and the improvement of Government efficiency.
 - Comply with the requirements of the Privacy Act for information that SSA collects on individuals, including, if necessary, publishing or amending Systems of Records Notices to adequately account for the information it collects.
 - With permission of the assigned SSA supervisor, securely destroy or erase copied SSA data or information when no longer needed for official SSA purposes. Prior to access, disclosure, and other handling of any personally identifiable information in SSA records, ensure permission from the assigned SSA supervisor for such action, to ensure authority exists for access, disclosure, or handling.
 - To the greatest extent possible, use the program agency system documentation to understand how to use the data and information which is being accessed.

SIGNATURES

Authorization of this Amendment:

Florence Felix-Lawson /s/

2/20/25

Florence Felix-Lawson
Chief Human Capital Officer
Social Security Administration

Date

2/20/2025

Amy Gleason
Acting Administrator
United States DOGE Service

Date