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Work Activity and Use of Employment Supports Under the Original Ticket to Work Regulations

2006 National Beneficiary Survey: Methodology and Descriptive Statistics

Final Report

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ACRONYMS

The following acronyms are used throughout this report.

AAPOR	American Association of Public Opinion Research
ADL	Activities of Daily Living
CAPI	Computer-Assisted Personal Interview
CATI	Computer-Assisted Telephone Interview
CDR	Continuing Disability Review
DI	Social Security Disability Insurance (under Title II of the Social Security Act)
IADL	Instrumental Activities of Daily Living
IWP	Individual Work Plan
MIE	Medical Improvement Expected (as determined by SSA)
MPR	Mathematica Policy Research
NBS	National Beneficiary Survey
PSU	Primary Sampling Unit
SSA	Social Security Administration
TRS	Telecommunication Relay Service
TTW	Ticket to Work
TTY	Text Typewriter

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ABSTRACT

In this report, we provide a description of the sampling design and the data collection activities for Round 3 (2006) of the Social Security Administration (SSA) National Beneficiary Survey (NBS). We also provide descriptive statistics about working-age Social Security Disability Insurance (DI) and Supplemental Security Income (SSI) beneficiaries derived from the national cross-sectional sample of the 2006 NBS.

This is the fourth in a series of reports that make up the fifth Ticket to Work evaluation report.

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I. INTRODUCTION

In this report, we provide a description of the sampling design and the data collection activities for Round 3 (2006) of the Social Security Administration (SSA) National Beneficiary Survey (NBS). We also provide descriptive statistics about working-age Social Security Disability Insurance (DI) and Supplemental Security Income (SSI) beneficiaries derived from the national cross-sectional sample of the 2006 NBS.

The NBS was designed to collect information to evaluate SSA's Ticket to Work (TTW) program, a voluntary employment program for working-age Social Security disability beneficiaries. Established by the Ticket to Work and Work Incentives Improvement Act of 1999, the program was designed to increase access to and quality of employment services for disability beneficiaries. Under TTW, SSA provides beneficiaries with a Ticket they may use to obtain vocational rehabilitation, employment, or other support services from participating providers called Employment Networks. These providers receive payments from SSA if the beneficiaries they serve achieve successful employment outcomes. Three payment systems are used under the program to reimburse Employment Networks. The traditional payment system is available only to state vocational rehabilitation agencies and operates in the same manner as it did prior to the implementation of TTW. Two new payment systems—milestone-outcome and outcome-only—were implemented under TTW and are available to all Employment Networks.[1] TTW was implemented in three phases over the 2002–2004 period, with a subset of U.S. states and territories being included in each phase of the rollout.

The NBS collects data from a national sample of working-age (age 18 to 64) DI and SSI beneficiaries and a sample of TTW participants. Three rounds of the NBS have been conducted in 2004, 2005, and 2006. The NBS is a key component of a congressionally mandated evaluation designed to assess the impact of TTW on the service use and employment outcomes of working-age SSI and DI beneficiaries. The evaluation includes process, participation, and impact analyses that rely on data collected from SSA administrative data, interviews with program stakeholders, and the NBS.

The remainder of this report is organized into two primary sections. In **Section II**, we describe the 2006 NBS methodology, including:

- the purpose of the survey and summary statistics on the survey sample

[1] Employment Networks select one of the two TTW payment systems under which they prefer to operate. The selected payment system then applies to all clients served by the provider under TTW. Only state vocational rehabilitation agencies have the option to choose on a case-by-case basis whether to serve a TTW client under the traditional payment system or under its selected alternative TTW payment system (milestone-outcome or outcome-only).

- the sample design (including the formation and selection of primary sampling units, the selection of beneficiaries and TTW participants in the clustered and unclustered components, the target population definition, and the sampling strata and sample sizes)

- a summary of the content and design of the survey questionnaire

- the data collection process and procedures

- a summary of the final case dispositions and response rates.

In **Section III**, we provide a set of data tables based on the national cross-sectional sample containing the following:

- the weighted and unweighted sample sizes for the subgroups for which descriptive statistics are presented

- descriptive statistics pertaining to the characteristics, sources of support, and employment-related activities of working-age SSI and DI beneficiaries (including their sociodemographic characteristics, living arrangements, health status, income sources, health insurance coverage, employment, service use, and awareness and use of SSA work supports).

II. DESCRIPTION OF THE NATIONAL BENEFICIARY SURVEY

A. PURPOSE OF THE SURVEY

As part of an SSA-sponsored TTW program evaluation, Mathematica Policy Research (MPR) conducted Round 3 of the NBS in 2006. Four rounds of annual interviews are planned. The first round of data was collected in 2004. The survey collects cross-sectional data from a national sample of DI and SSI beneficiaries age 18 to 64 (hereinafter referred to as the Representative Beneficiary Sample) and a sample of TTW participants (hereinafter referred to as the TTW Participant Sample). In addition, cohorts of TTW participants are followed longitudinally. The three sampling frames permit the evaluation to assess point-in-time service use and employment outcomes of all beneficiaries and of TTW participants, and to assess the longitudinal outcomes of a subsample of early TTW participants.

The survey has the following five key objectives:

- To provide data on the work-related activities of SSI and DI beneficiaries, particularly as they relate to the implementation of TTW
- To describe the characteristics and program experiences of beneficiaries who use their Tickets
- To gather information about beneficiaries who do not use their Tickets and the reasons they do not
- To assess the employment outcomes of Ticket users and other SSI and DI beneficiaries
- To collect data on service utilization, barriers to work, and perceptions about TTW and other SSA programs designed to help beneficiaries with disabilities find and keep jobs.

The survey data are combined with SSA administrative data to provide critical information on access to services and employment outcomes for disability beneficiaries, including those who do and those who do not participate in the TTW program. The survey data may also be used by SSA for other policy making and program planning efforts, and by external researchers interested in disability and employment issues.

B. DATA COLLECTION OVERVIEW

The NBS was designed as a computer-assisted telephone interviewing (CATI) survey with computer-assisted personal interviewing (CAPI) follow-up for beneficiaries who did not respond to the CATI interview or who requested an in-person interview to facilitate

their survey participation. The survey instrument was identical in each data collection mode and sample members in both the Representative Beneficiary Sample and the TTW Participant Samples received the same survey instrument. Whenever possible, the interview was attempted with the sample person. If this person was unable to complete either a telephone or in-person interview due to their disability, a proxy respondent was sought.

The sample size for Round 3 was 3,382 for the Representative Beneficiary Sample and 5,697 for the TTW Participant Sample (9,079 total). The Round 3 TTW Participant sample includes follow-up interviews with 1,466 persons who were selected in the Round 1 participant sample, follow-up interviews with 1,350 persons selected in Round 2, and initial interviews with 2,881 TTW participants who were newly selected for Round 3. Round 3 interviews were completed with 2,508 individuals in the Representative Beneficiary Sample and 4,097 individuals in the TTW Participant Sample for a total of 6,605 completed interviews. An additional 215 beneficiaries and 46 TTW participants were determined to be ineligible to participate in the survey.[2] Across both samples, 5,104 cases were completed by telephone and 1,501 were completed by CAPI. Interviews with proxy respondents were completed for 1,286 sample members.

The weighted response rates[3] (in percents) for each of the samples are as follows: Representative Beneficiary Sample (81.1), cross-sectional TTW Participant Sample (84.4), longitudinal Phase 1 TTW Participant Sample members completing all three rounds (62.8), and Phase 2 longitudinal cases (71.7).

C. SAMPLING DESIGN

SSA implemented TTW in three phases spanning three years, with each phase corresponding to approximately one-third of the states. The initial study design for the NBS included four national cross-sectional surveys (called rounds) of SSA disability

[2] Ineligible sample members include those who were deceased, no longer living in the continental US, incarcerated, in active military service, or who were denied benefits since sample selection or had never received benefits.

[3] This response rate is the weighted count of sample members for whom a completed interview was obtained or who were determined to be ineligible divided by the weighted sample count of all sample members (# of completed interviews + # partially completed + # of ineligibles / # of cases in the sample). It can be determined by taking the product of the weighted location rate and the weighted cooperation rate, also known as the weighted completion rate among located sample members. This response rate is equivalent to the American Association of Public Opinion Research (AAPOR) standard response rate calculation: RR_{AAPOR} = # of completed interviews / # of cases in the sample – estimated # of ineligible cases. Ineligible cases are included in the numerator for two reasons: 1) the cases classified as ineligible are part of the original sampling frame (and hence the study population). We obtained complete information to fully classify these cases (i.e., their responses to the eligibility questions in the questionnaire are complete) and therefore classify them as respondents; 2) incorporating the ineligibles in the numerator and denominator of the response rate is essentially equivalent to the definition of a response rate with these cases excluded if the persons with an additional estimation of the number of eligible cases among those with eligibility unknown. By including the ineligible cases in the numerator and denominator, we avoid using this estimation stage and the response rate computation is more clearly explicated.

beneficiaries—one each in 2004, 2005, 2006, and 2007—and two cross-sectional surveys of TTW participants in each of three groups of states (early, middle, and late rollout states, referred to as Phase 1, 2, and 3, respectively) chosen to represent implementations of TTW. Moreover, the first TTW participant cohort in each group of TTW rollout states is interviewed annually in subsequent survey rounds. The final round was postponed to address the experiences of TTW participants under the new TTW regulations, implemented in July 2008. Three surveys were fielded in Round 3 (2006):

1. The third national survey of all beneficiaries (the Representative Beneficiary Sample)

2. The second cross-sectional survey of TTW participants who resided in a Phase 2 state at the time of Ticket assignment (the Phase 2 Cross-Sectional TTW Participant Sample)

3. The first cross-sectional survey of TTW participants who resided in a Phase 3 state at the time of Ticket assignment (the Phase 3 Cross-Sectional TTW Participant Sample).

In addition, we attempted to re-interview Phase 1 TTW participants who were selected into the sample at Round 1 whether or not they had been interviewed in Rounds 1 or 2 (the Phase 1 Longitudinal Sample), and Phase 2 cases who were selected into the sample at round 2, whether or not they had been interviewed at Round 2 (the Phase 2 Longitudinal Sample). Most, but not all, of Phase 2 longitudinal sample cases also were part of the Phase2, Round 3 Cross-Sectional TTW Participant Sample.[4]

In each first follow-up year (Round 2 for Phase 1 TTW Participants and Round 3 for Phase 2 TTW Participants), a supplemental sample of those who had entered the TTW program since the first year of rollout for each phase or who had not been sampled before, was selected to produce an expanded second-year cross-sectional survey. The cross-sectional surveys consist of the supplemental cases plus the longitudinal cases who were still TTW participants at the time of sampling. In Round 3 there were cross-sectional samples for Phase 2 and Phase 3 participants. No supplemental cross-sectional sample was selected for the Phase 1 TTW participants at Round 3.

The survey included a multi-stage sampling design (used for all survey rounds) with a supplemental single-stage sample for some TTW participant populations. Primary Sampling Units (PSUs) were formed in every state based on counts of the number of beneficiaries in each county provided by SSA. A three-stage sample design was used to select the Representative Beneficiary Sample:

[4] Ninety-five percent of the 1,350 Ticket Participants sampled at round 2 (1,289) were still signed up with TTW provider at the time of the round 3 sample selection and therefore were considered part of the Phase 2 Cross-Sectional Sample. The remainder were not TTW participants at round 3 and therefore not eligible for the Phase 2 Ticket Participant Cross-Sectional Sample (although they were still part of the Phase 2 Ticket Participant Longitudinal Sample).

- In the first stage, the number of PSUs to be selected from each of the Phase 1, 2, and 3 TTW rollout states was identified. The total number of PSUs to be selected was 80. PSUs were selected with probability proportional to the size of the beneficiary population in the PSUs. Because one PSU was selected twice given the large number of beneficiaries in the included county, the final number of PSUs selected was 79.

- In the second stage, second-stage sampling units were formed in the two largest PSUs (which were selected with certainty) based on zip code; two secondary units were selected in one of these PSUs and four secondary units were selected in the other PSU.

- In the third stage, the beneficiary sample was selected in four age-specific strata. The final sample size for the Representative Beneficiary Sample was 3,382.

The original sampling design for the TTW Participant Sample called for using the same PSUs developed for the Representative Beneficiary Sample. Because the number of TTW participants was smaller than expected, the number in the PSUs was not sufficient to support the desired data analysis.[5] To rectify this, both a clustered and an unclustered sample were selected for the TTW Participant Sample. The clustered TTW Participant Sample was selected in the same manner as the Representative Beneficiary Sample using the same PSUs, but due to the small number of TTW participants, the secondary sampling units were not used and the sample was drawn from all participants in the PSUs. Participants were stratified by TTW provider payment type (traditional, milestone-outcome, and outcome-only) rather than by age. As described further below, an unclustered sample of participants was selected to supplement the clustered participant sample for participants using two of the three TTW provider payment types (outcome-only and milestone-outcome).

At Round 3, the final sample size for the Cross-Sectional Sample was 7,552—3,382 from the Representative Beneficiary Sample, 2,797 from the Phase 2 TTW Participant Cross-Sectional Sample, and 1,373 from the Phase 3 TTW Participant Cross-Sectional Sample (see Table 1 for a detailed description of sample size by strata). The Phase 2 TTW Participant Cross-Sectional Sample included 1,289 longitudinal cases (95 percent of the 1,350 sample members in the Phase 2 Longitudinal Sample), and 1,508 Supplemental Sample cases that were interviewed for the first time in Round 3. Sixty-one Phase 2 Longitudinal sample members who were either deceased or were not found in SSA's file of active TTW participants at Round 3 were not included in the Cross-Sectional Sample.

[5] The Survey Sample Design Report includes more detailed information regarding the original NBS sample design (Bethel and Stapleton 2002).

Table 1. Round 3 Sample Sizes and Number of Target Completed Interviews per Sampling Strata for Cross Sectional Cases

Sampling Strata (by Age)	Sample Size	Target Completed Interviews	Actual Completed Interviews
Representative Beneficiary Sample	3,382	2,400	2,508
18 to 29	943	666	698
30 to 39	941	666	672
40 to 49	935	666	711
50 to 64	563	402	427
TTW Participant Sample	4,170	3,000	3,115
Phase 2 Cross-Sectional[a]	2,797	2,000	2,062[b]
Traditional	867	666	733
Milestone-Outcome (Clustered)	389	666	357
Milestone-Outcome (Unclustered)	548		306
Outcome-Only (Clustered)	123	666	87
Outcome-Only (Unclustered)	870		579
Phase 3 Cross-Sectional	1,373	1,000	1,053
Traditional	444	333	369
Milestone-Outcome	444	333	362
Outcome-Only (Clustered)	237	333	178
Outcome-Only (Unclustered)	248		144
Total Sample Size	7,552	5,400	5,623

[a]The Phase 2 Cross-Sectional Sample includes 1,289 TTW participants sampled at Round 2 who were still in SSA's TTW participant file at Round 3 and 1,508 TTW participants in SSA's TTW participant file newly sampled at Round 3. Phase 1 sample members are not part of the Round 3 Cross-Sectional Sample.

[b]There are 982 additional completed interviews among TTW participants on the Round 3 data file (for a total of 4,097 completed interviews). These are Phase 1 and Phase 2 longitudinal sample members that were not eligible for the Round 3 Cross-Sectional Sample (that is, they were not TTW Participants at Round 3).

The sample size for the TTW Participant Longitudinal Sample was 2,816, consisting of 1,466 Phase 1 TTW participants, and 1,350 Phase 2 TTW participants (see Table 2 for a detailed description of sample size by strata).

The full sample of TTW participants included 5,697 sample members. This number consisted of 4,170 participants in the Cross-Sectional Samples, 1,466 Phase 1 sample members who were in the Phase 1 Longitudinal Sample only, and 61 sample members who

were participants in Round 2 and not at Round 3 and in the Phase 2 Longitudinal Sample only. The 1,466 Phase 1 sample members may or may not have been TTW participants in Round 3, but because TTW participants from Phase 1 states who entered the TTW program after Round 1 sampling were not sampled in Round 3, the Phase 1 sample members were not part of the Round 3 TTW Participant Cross-Sectional Sample.

Table 2. Round 3 Phase 1 and Phase 2 Longitudinal Sample Sizes and Completes per Sampling Strata

Sampling Strata	Sample Size	Completed Interviews
TTW Participant Longitudinal Sample	2,816	
Phase 1, complete in Rounds 1 and 2	1,466	897
Traditional	441	304
Milestone-Outcome	455	282
Outcome-Only (Clustered)	123	68
Outcome-Only (Unclustered)	447	243
Phase 1, complete Rounds 1, 2, and 3	1,466	767
Traditional	441	266
Milestone-Outcome	455	241
Outcome-Only (Clustered)	123	64
Outcome-Only (Unclustered)	447	196
Phase 2, complete Rounds 2 and 3	1,350	831
Traditional	437	308
Milestone-Outcome (Clustered)	216	146
Milestone-Outcome (Unclustered)	220	119
Outcome-Only (Clustered)	86	48
Outcome-Only (Unclustered)	391	210

1. Target Population

The target population for both the Representative Beneficiary Sample and the TTW Participant Samples consisted of SSI and DI beneficiaries between the ages of 18 and 64. For the Representative Beneficiary Sample, the target population included beneficiaries in all 50 states and the District of Columbia[6] who were in active pay status as of June 2005. In the Representative Beneficiary Sample two subpopulations of beneficiaries who are not eligible

[6] Beneficiaries in the Trust Territories and Puerto Rico were excluded from the survey target population.

for TTW participation were included in the survey samples to give complete coverage of the national beneficiary population. These were as follows:

- Beneficiaries who were designated as Medical Improvement Expected (MIE) at the time they received their allowances and who had not yet completed a first Continuing Disability Review (CDR)

- Young SSI recipients who were receiving benefits because of their eligibility as a child, and were in the process of completing a re-determination under the adult eligibility criteria.

The beneficiary target population included approximately 10.4 million persons, and approximately 2.1 million beneficiaries were in the sampled PSUs.

For the Cross-Sectional TTW Participant samples, the target population included beneficiaries who had used the Ticket at least once on or between January 1, 2005 and October 2, 2005.[7] For the TTW participants, the study population was based on the TTW rollout schedule. Participants were assigned to a phase for this study on the basis of their address at the time of program rollout regardless of their current address. Thus, a Phase 2 participant (middle rollout state) might reside in any state at the time of the survey. The target population for Round 3 included beneficiaries who were participants in TTW in the Phase 2 or Phase 3 rollout states. In addition, a sample of Phase 2 participants, new to the program since the construction of the Round 2 file, was selected to supplement the Phase 2 Longitudinal Sample from Round 2 for cross-sectional analyses of Phase 2 TTW participants at the time of the Round 3 survey. At the time of Round 3 sampling, the target population for the Phase 2 participant sample included 33,500 TTW participants and the target population for the Phase 3 participant sample included 31,023 TTW participants.

For the Phase 1 TTW participants, the samples were designed for the analysis of one population:

- The longitudinal population: persons who were participants at the time of the Round 1 data collection.

For the Phase 2 TTW participants, the samples were designed for the analysis of two overlapping populations:

- The longitudinal population: persons who were participants at the time of the Round 2 data collection

- The cross-sectional population: persons who were currently participants.

[7] The dates for eligible Round 2 TTW participants are slightly different from the dates used in Round 1. For Round 1, active Ticket use was defined as having used the Ticket at least once between January 1, 2003 and September 28, 2003. The difference in the dates is not expected to have any effect on the analysis.

Phase 3 TTW participants were selected for the first time in Round 3 from the TTW participant sampling frame.

MPR processed a beneficiary universe file from SSA of approximately 10.4 million records and a participant universe file, incorporating both Phase 2 and Phase 3 TTW participants, of 62,543 records. In addition, MPR also processed a universe file of 21,477 Phase 1 TTW participants who were active in round 1 (Phase 1 TTW participants who joined the program after round 1 sampling were not included in this participant universe.)

2. Strata Definitions and Sample Sizes

The sample is designed to be statistically and operationally efficient and to provide adequate sample sizes for the planned analyses. To ensure a sufficient number of persons seeking work, the Representative Beneficiary Sample was classified into sampling strata based on age, with persons in the younger age categories selected at higher rates than persons in the oldest age category. The sampling strata for the TTW Participant samples were defined by the TTW payment system.

The Representative Beneficiary Sample was divided into the following age groups, 18-29, 30-39, 40-49, and 50-64, which were used as the sampling strata. The target number of completed interviews for Round 3 was 666 beneficiaries in each of the three younger age groups (18-29, 30-39, and 40-49). For the 50-64 age cohort, the target number of completed interview was 402 beneficiaries.

For TTW participants, services received from participating providers, called Employment Networks, can be provided under three TTW payment systems: (1) outcome-only; (2) milestone-outcome, or (3) under the traditional vocational rehabilitation reimbursement system. Because the prevalence of the outcome-only and milestone-outcome payment types was low among Phase 1 and Phase 2 participants in the Round 3 cross-sectional files, both a clustered and unclustered sample of participants were selected for these payment types. The samples of participants using the traditional payment types were limited to the clustered sample.[8] The target number of completed interviews for participants in the Phase 2 Cross-Sectional Sample at Round 3 was 2,000 overall, with a target of approximately 666 in each payment type stratum. The target number of completes for the Phase 3 Cross-Sectional Sample was 1,000 with approximately 333 to be completed in each stratum.

For the beneficiaries in all samples, whether clustered or unclustered, sample members underwent the same level of locating activities to identify a telephone number so that a telephone interview could be attempted. However, if a telephone interview was not possible and an in-person interview was required, the level of effort differed between the clustered and unclustered samples. If a telephone number could not be identified or an in-person

[8] For the Round 2 survey, unclustered samples are required for both the outcome-only and the milestone-outcome payment types.

interview was otherwise required, sample members in the clustered sample were eligible for a field follow-up and were assigned to field locators/interviewers. Beneficiaries in the unclustered sample who could not be located or who required an in-person interview were "closed out". Statistically, these cases were accounted for in the clustered sample and operationally, they were treated as if they were not sampled.

In general, the samples selected for the survey included 2.5 to 3 times as many cases as we needed to ensure an adequate pool of sample members to achieve the target number of completed interviews.[9] These samples were randomly partitioned into subsamples (called "waves"). During the data collection period, we monitored the sample results and determined whether, and in what strata and PSUs, additional cases were needed.

D. QUESTIONNAIRE

The NBS collects data on a wide range of topics including employment, disability, experience with a variety of SSA programs, employment services used in the past year, health and functional status, health insurance, income and other assistance, and sociodemographic information. The survey items were selected and pre-tested as part of a separate contract held by The Lewin Group and Westat. Revisions were made by MPR to prepare the instrument for CATI/CAPI programming and the programmed instrument was pre-tested prior to fielding. To promote response among Hispanic populations, the questionnaire was translated into Spanish. Interpreters were used to conduct interviews in languages other than Spanish.

While the Round 3 instrument was virtually identical to the Round 1 and 2 versions, some modifications were made to the Round 3 instrument to update reference periods (from 2004 to 2005) and to add a few items designed to gather more in-depth data from respondents who were not currently working. Revisions were also made to accommodate the longitudinal sample who had completed a prior round so that items that did not need to be re-asked were skipped.

The questionnaire is divided into 18 sections, labeled A through M, which serve the following purposes:

Section A: Screener. This section confirms that the correct sample persons have been contacted and verifies that they are eligible for the survey. Respondents are also administered a cognitive assessment to ensure they are capable of completing the interview. If they do not pass the cognitive assessment, they are asked if there is someone else who can answer questions about their health, daily activities, and any jobs they might have (such as a friend, parent, caseworker, or payee). An interview is then pursued with the proxy respondent. To minimize bias in reporting, proxy respondents were not asked all questions the sample

[9] This expanded initial sample size was chosen to accommodate differential response and eligibility rates across the PSUs and sample strata and allow for a distribution of the sample that would be statistically efficient.

person was eligible to receive. Proxies were not asked to provide subjective assessments on behalf of the sample person; for example, regarding satisfaction with jobs or programs.

Section B: Disability and Current Work Status. This section collects information on the beneficiary's limiting physical or mental condition(s) and current employment status. If the beneficiary is not currently employed, the section explores reasons for not working. This section also includes questions designed to determine the job characteristics that are important to beneficiaries, and collects information about work-related goals and expectations.

Section C: Current Employment. This section collects detailed information about each beneficiary's current job(s). Respondents are asked about the type of work performed, type of employer, hours worked, benefits offered, and wages earned. The section also asks about work-related accommodations, those received, as well as those needed but not received. Other questions solicit information about job satisfaction.

Section D: Jobs/Other Jobs During 2005. This section collects information about employment during the 2005 calendar year, including type(s) of employer(s), hours worked, wages earned, and reasons for leaving employment, if applicable. Other questions ask if beneficiaries worked or earned less than they could have (and if so, the reasons why), and collect information about experiences related to Social Security benefit adjustments due to work.

Section E: Awareness of SSA Work Incentive Programs and TTW. This section collects information designed to assess whether the beneficiary is aware of, or is participating in, specific SSA work incentive programs and services. For the TTW program, information is collected on how beneficiaries learned about the program, the names of providers they signed up with, and the dates they signed up with their service providers.

Section F: TTW Non-Participants in 2005. This section, administered only to beneficiaries not participating in TTW, collects reasons for TTW non-participation. It asks whether the beneficiary has attempted to learn about employment opportunities (including TTW), problems the beneficiary may have had with Employment Networks or other employment agencies, and how those problems were handled or resolved.

Section G: Employment-Related Services and Supports Used in 2005. This section collects information about beneficiary use of employment-related services in calendar year 2005, including the types of services received, the types of providers used, how long they received services, how the services were paid for, and reasons for and satisfaction with service utilization. Other questions ask about sources of information about services and the nature of any services that were needed but not received.

Section H: TTW Participants in 2005. This section, administered only to respondents who indicate earlier in the interview that they participated in TTW in 2005, collection information about experiences with the TTW program, including information related to how they decided to participate in TTW; the kinds of information they used to pick their current service providers; development of the individual work plan (IWP); and any

problems experienced with services provided by an Employment Network. The section also includes a series of questions about how problems with Employment Networks were resolved and overall satisfaction with the TTW program.

Section I: Health and Functional Status. This section collects information about the beneficiary's health status and daily functioning, including the need for special equipment or assistive devices. Information is solicited regarding: general health status (via the SF-8™); [10] difficulties with Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs); a variety of functional limitations; substance abuse/dependence; and treatment for mental health conditions.

Section J: Health Insurance. This section collects information about sources of health insurance coverage, both at interview and during calendar year 2005.

Section K: Income and Other Assistance. This section collects information about sources of income, including income received from earnings, Social Security, workers' compensation, and other government programs and sources.

Section L: Sociodemographic Information. This section collects basic demographic information about the beneficiary, such as race, ethnicity, education, parental education, marital status, living arrangements, and household income.

Section M: Closing Information and Observations. This section collects address information for the sample person. Telephone information for up to two contact people is collected for participants who may be selected for future survey rounds. The interviewer also records reasons a proxy or assistance was required if appropriate, and documents special circumstances.

See Table 3 for a summary description of the main questionnaire pathing. The complete survey instrument is available from MPR upon request.

Because the NBS population represents a wide range of disabilities with varying degrees of severity, several features were incorporated into the instrument design to overcome possible cognitive or stamina challenges. Structured probes were included in the survey instrument, which allowed questions to be rephrased and concepts defined in a standard manner if respondents required clarification or additional information. To minimize item nonresponse, the survey instrument included follow-up questions for continuous variables. For example, if a respondent could not provide an exact amount, the "don't know" response was followed with a modified version of the question that offered response categories (the upper and lower bounds of each category were based on ranges analysts specified). In general, we attempted to word survey questions simply, clearly, and briefly as well as in an

[10] SF-8™ is a trademark of QualityMetric, Inc.

Table 3. Overview of the National Beneficiary Survey Questionnaire

Section	Title of Section	Respondents Receiving the Section
A	Screener	All respondents
B	Disability/Current Work Status	All respondents
C	Current Employment	Respondents who answer (B24 = YES) Question B24: Are you currently working at a job or business for pay or profit?
D	Jobs/Other Jobs During 2005	Respondents who answer (B30 = YES) Question B30: Did you work at a job or business for pay or profit anytime in 2005?
E	Awareness of SSA Work Incentive Programs and TTW	All respondents
F	TTW Non-Participants in 2005	Respondents who answer (E35 = NO, DON'T KNOW, OR REFUSED) Question E35: Did you ever try to get a Ticket from Social Security or anywhere else? OR Respondents who answer (E36 = NO, DON'T KNOW, OR REFUSED) Question E36: Have you ever used your Ticket to sign up with an Employment Network? OR Respondents who answer (E37 = NO, DON'T KNOW, OR REFUSED) Question E37: Were you signed up with any Employment Network or a State Vocational Rehabilitation Agency at any time in 2005?
G	Employment-Related Services and Supports Used in 2005	All respondents
H	TTW Participants in 2005	Respondents who answer (E37 = YES) Question E37: Were you signed up with any Employment Network or a State Vocational Rehabilitation Agency at any time in 2005? OR Longitudinal respondents who were signed up with an Employment Network or a State Vocational Rehabilitation Agency at Round 2.
I	Health and Functional Status	All respondents
J	Health Insurance	All respondents
K	Income and Other Assistance	All respondents
L	Sociodemographic Information	All respondents
M	Closing Information/Observations	All respondents

unbiased manner so that respondents could readily understand key terms and concepts. Given the intent of the questions, response categories were appropriate, mutually exclusive, and reasonably exhaustive.

Additionally, interviewers were instructed to use neutral, nondirected probing methods (repeating the question, repeating the response categories, asking for more information, stressing generality, stressing subjectivity, and zeroing in) when necessary and to use active listening skills and patience. They provided neutral feedback and encouragement throughout the survey and were trained to help keep the respondent free of distractions, to say the respondent's name often, and to avoid using an exaggerated inflection or tone of voice. To overcome stamina challenges, interviewers were trained to be aware of behaviors that might indicate that a respondent was too fatigued to continue. If a respondent seemed tired, agitated, or distracted, for example, interviewers were encouraged to ask whether the respondent needed to take a break and schedule another time to continue and to set appointments for times when the respondent was most alert.

E. DATA COLLECTION

CATI data collection began in February 2006.[11] In-person locating and interviewing of telephone nonrespondents and beneficiaries who requested an in-person interview began in May 2006 and continued, concurrent with CATI interviewing, through September 2006. In total 6,605 cases were completed (including 16 partially completed interviews)—2,508 from the Representative Beneficiary Sample and 3,115 from the Phase 1 and Phase 2 Cross-Sectional Samples.[12] An additional 982 cases were not eligible for the Cross-Sectional Sample, but are included on the data file as completed interviews from the Longitudinal TTW Participant Sample (for a total of 4,097 TTW Participant completed interviews).

1. Advance Contacts

To increase respondent trust and rapport, all sample members for whom MPR had a valid address were sent an advance letter and a list of frequently asked questions and answers before the start of data collection. The advance letter, printed on SSA letterhead and signed by an SSA official, identified SSA as the sponsor of the survey and MPR as the survey contractor, explained the purpose of the survey, offered assurances of confidentiality, described the voluntary nature of participation, and included a toll-free number, a text typewriter (TTY) number, and an e-mail address for respondents to use to contact MPR with questions or to complete the interview at their convenience. To encourage participation and show appreciation for response, a post-paid incentive payment of $10 was offered to respondents who completed the survey. The advance letters also indicated that the interview could be conducted in-person if he or she was unable to respond by telephone because of a limiting condition.

[11] Note that interviewing began approximately eight months after the sample was selected.

[12] Partial interviews were considered as completed if responses were provided through section H of the interview (or if the respondent was not eligible to received section H, through section G of the interview).

In an additional effort to help establish legitimacy, SSA posted information about the survey on the agency website and circulated information describing the survey to SSA field offices. Field offices were also sent the names of telephone and in-person interviewers involved in the NBS so that these individuals could be identified as legitimate contacts.

2. Locating

Sample member contact information was provided by SSA from administrative records. Prior to the mailing of the advance materials, all addresses were verified or updated using a commercially available database. Over the course of the Round 3 data collection, 40 percent of telephone numbers initially provided were identified as invalid and were sent to central office locating. MPR used a variety of techniques for locating updated information, including database searches, calling relatives and friends, receiving updated contact information from SSA, and making in-person visits for field locating. As a result of these efforts, approximately 93 percent of the cases with invalid contact information were eventually located for interviewing; 70 percent of them eventually completed the interview.

3. CATI and CAPI Interviews

In total, 5,104 cases were completed by telephone. Sixty-nine percent of the Representative Beneficiary Sample interviews (n=1,737) and 82 percent of interviews from the TTW Participant Samples (n=3,367) were completed via CATI. Approximately 57 percent of the total completed interviews were obtained before the start of CAPI data collection (May 2006). The NBS took, on average, 50 minutes to administer. The interview length ranged from 16 to 180 minutes (excluding TTY, Relay, and instant messaging interviews).

To overcome communication challenges, the interview was conducted via TTY, Telecommunications Relay Service (TRS), or instant messaging for persons with severe hearing or speech impairments. To minimize respondent burden, standard abbreviations were used for TTY and instant messaging interviews (such as eliminating capitalization, some punctuation, and programming instructions and using common abbreviations such as "ga" [go ahead], "nu" [number], "oic" [oh, I see], while maintaining question wording). In addition, in-person interviewers obtained the services of sign language translators and made a range of other accommodations when interviewing persons with hearing impairments in their home to maximize survey participation.

In all, 2,734 cases, or approximately 30 percent of the total sample, were sent to field interviewers for in-person interviewing. Of these, 185 (7 percent) were eventually completed via CATI, and 1,490 (54 percent) were completed by field interviewers. Field interviewers were trained to encourage sample persons to call in and complete the survey by telephone once they were located to save on data collection costs. Thirty-one percent of the Representative Beneficiary Sample (n=771) and 18 percent of the TTW Participant Sample completed interviews (n=730) were obtained via CAPI.

Most cases sent to the field (57 percent) were done so because a valid telephone number could not be located. Another 22 percent were sent to the field because they were difficult to

contact via telephone or had evaded contact efforts. An additional 18 percent were sent to the field because the sample person initially refused a CATI interview. The remaining two percent of cases were sent to the field because they requested an in-person interview or needed an in-person interview to accommodate their disability.

4. Assisted and Proxy Interviews

To increase opportunities for self-response, "assisted" interviews were permitted. These interviews were different from proxy interviews because beneficiaries answered most questions themselves. The assistant, typically a family member, provided encouragement, interpretation, and verified answers when needed. We allowed assisted interviews to minimize item nonresponse, improve the accuracy of responses, and overcome less limiting conditions, such as difficulty hearing and language barriers. In all, 238 assisted interviews were conducted (four percent of all completed interviews) during Round 3.

As a last resort, proxy respondents were used to complete the survey on behalf of respondents who could not complete the survey themselves (even with assistance) either by telephone or in-person. This included sample members with severe communication impairments, those with severe physical disabilities that precluded participation (in any mode), and those with mental impairments that might have compromised data quality. Interviewing the sample member, rather than a proxy respondent, whenever possible was strongly favored because sample members generally provide more complete and accurate information than do proxy respondents. However, allowing the use of proxy respondents when necessary minimized the risk of nonresponse bias that would have resulted from the exclusion of individuals with severe physical or cognitive impairments.

We used an innovative "mini-cognitive test" designed expressly for the survey to identify when proxy respondents were needed.[13] The screener provided interviewers with a tool for evaluating when to seek a proxy and minimized the need to leave this decision to interviewer discretion or to gatekeeper advice. The test combined the ability to understand the survey topics with elements of informed consent.

In some situations, a knowledgeable informant expressed that a proxy would be necessary. In these cases several guidelines were used to determine whether a proxy would be appropriate. These guidelines included using proxies only when the sample member's physical or mental condition precluded self-response, selecting the most knowledgeable proxy, and ensuring that the proxy answered on behalf of the sampled respondent rather than offering his or her own opinions. Interviewers were trained to overcome gatekeepers' objections, and to give sample members the opportunity to speak for themselves whenever possible.

At Round 3, proxy interviews were completed for 1,286 sample persons (20 percent of all completed interviews). In most cases (76 percent), a proxy was necessary because the

[13] Westat designed the test as part of the design of the TTW evaluation; MPR modified it after pretesting.

sample person failed the cognitive assessment or was otherwise determined to be unable to respond due to a cognitive or mental impairment. Interviews were completed by proxy for 637 sample persons in the Representative Beneficiary Sample (25 percent of completed interviews) and 503 sample persons in the TTW Participant Samples (12 percent of completed interviews).

5. Characteristics of CATI, CAPI, and Proxy Respondents

An analysis of selected respondent characteristics indicates a few differences between CATI and CAPI respondents, and between sample members requiring a proxy respondent and all interviews (Table 4). Relative to CATI respondents, CAPI respondents were more likely to be SSI recipients; younger; to have achieved lower levels of education; and to have experienced childhood onset of disability. Relative to all respondents, those requiring a proxy interview were more likely to be male, younger, SSI recipients, have completed less than a high school level of education, have mental retardation, and have experienced childhood onset of disability.

6. Case Disposition Summary and Response Rates

Table 5 provides a summary of final case dispositions for all released cases in the sample. Tables 6 and 7 provide breakdowns of response rates by sample type and sampling strata.

Table 4. Characteristics of CATI, CAPI, and Proxy Respondents

	All Interviews	CATI	CAPI	Proxy
Number (unweighted)	6,605	5,104	1,501	1,286
Percent of All Interviews (unweighted)	100.0	77.3	22.7	19.5
		Percent (unweighted)		
Social Security Program				
DI-only	45.6	48.7	34.9	26.5
Concurrent	22.2	21.9	23.1	26.5
SSI-only	32.2	29.3	42.0	47.0
Sex				
Male	50.9	50.5	52.0	60.1
Female	49.1	49.5	48.0	39.9
Age in Years				
18-24	11.1	10.1	14.3	25.5
25-39	32.7	31.3	37.4	40.6
40-54	41.2	42.7	36.2	26.5
55+	15.0	15.9	12.0	7.4
Race				
White	65.1	66.2	61.5	66.5
Black	31.0	29.9	34.8	29.8
Other	3.8	3.9	3.7	3.7
Hispanic/Latino Ethnicity	9.0	8.2	11.6	11.0
Education				
Did not complete high school or GED	25.9	24.6	30.2	44.3
High school diploma or GED	39.0	38.4	41.0	49.5
More than high school	35.1	36.9	28.8	6.2
Conditions Causing Limitation				
Mental illness	38.6	38.4	39.3	35.8
Mental retardation	7.8	7.6	8.7	32.8
Musculoskeletal	24.9	25.6	22.3	9.5
Sensory disorders	8.8	8.3	10.5	13.1
Other nervous system diseases	15.2	15.8	13.1	15.1
Other	49.6	50.0	48.4	46.7
No conditions limit activities	10.6	11.2	8.3	5.8
Disability Onset in Childhood (<Age 18)	36.4	33.9	44.8	78.0
Employed at Interview	26.3	27.6	21.9	27.9

Source: 2006 National Beneficiary Survey.

Table 5. Summary Case Disposition by Sample Type and Sampling Strata

		Complete			Ineligible			Refused			Unlocated			Non-Respondents		
	Total Sample	Count	Un-weighted Percent	Weighted Percent	Count	Un-weighted Percent	Weighted Percent	Count	Un-weighted Percent	Weighted Percent	Count	Un-weighted Percent	Weighted Percent	Count	Un-weighted Percent	Weighted Percent
National Representative Beneficiary Sample																
Age 18-29	943	698	74.0	74.0	77	8.2	8.2	62	6.6	6.6	69	7.3	7.3	37	3.9	3.9
Age 30-39	941	672	71.4	71.4	56	6.0	6.0	101	10.7	10.7	63	6.7	6.7	49	5.2	5.2
Age 40-49	935	711	76.0	76.0	49	5.2	5.2	89	9.5	9.5	41	4.4	4.4	45	4.8	4.8
Age 50-64	563	427	75.8	75.8	33	5.9	5.9	59	10.5	10.5	23	4.1	4.1	21	3.7	3.7
Total Beneficiary	3,382	2,508	74.2	75.2	215	6.4	6.0	311	9.2	9.9	196	5.8	4.8	152	4.5	4.2
Cross-Sectional TTW Participant Sample																
Phase 2																
Traditional	867	733	84.5	84.6	9	1.1	1.1	69	8.0	7.8	27	3.1	3.0	29	3.3	3.5
Milestone-Outcome	937	663	70.8	78.8	11	1.2	1.0	85	9.1	10.9	17	1.8	1.8	65	6.9	7.5
Outcome-Only	993	666	67.1	70.9	9	.9	3.2	107	10.8	13.6	13	1.3	4.2	75	7.6	8.1
Total Phase 2	2,797	2,062	73.7	83.4	29	1.0	1.1	261	9.3	8.4	57	2.0	2.9	169	6.0	4.2
Phase 3																
Traditional	444	369	83.1	83.1	6	1.4	1.3	42	9.5	9.4	13	2.9	2.9	14	3.2	3.2
Milestone-Outcome	444	362	81.5	82.9	7	1.6	1.4	38	8.6	7.8	18	4.1	4.1	19	4.3	3.9
Outcome-Only	485	322	66.4	73.1	4	0.8	0.9	55	11.3	11.9	18	3.7	5.1	28	5.8	8.9
Total Phase 3	1,373	1,053	76.7	82.8	17	1.2	1.3	135	9.8	9.3	49	3.6	3.2	61	4.4	3.4
Total Participant	4,170[a]	3,115	74.7	83.1	46	1.1	1.2	396	9.5	8.8	106	2.5	3.0	230	5.5	3.8
Combined Sample																
Total Sample**	7,552	5,623	74.5	75.2	261	3.5	5.9	707	9.4	9.9	302	4.0	4.8	382	5.1	4.2

Source: 2006 National Beneficiary Survey.

Note: The number of completed cases includes 16 partially completed interviews: 10 in the TTW Participant Sample and 6 in the Representative Beneficiary Sample.

[a]=The total number of TTW Participant cases in the Cross-Sectional Sample does not include 982 cases from the longitudinal sample that were not eligible for the Cross Section (were not TTW Participants at Round 3).

** The weighted percentages can be calculated as a weighted average of the Representative Beneficiary and TTW Participant Samples. This average is dominated by the percentages from the Representative Beneficiary Sample.

Table 6. Weighted Response Rates by Sample Type and Sampling Strata for the Representative Beneficiary, Phase 1 Participant Cross-Sectional, and Phase 2 TTW Participant Samples

Sample Type (by Age)	Weighted Count of Responded (Completed + Ineligibles)	Weighted Percent	Weighted Count of Completed Interviews
Representative Beneficiary Sample	8,424,258	81.1	7,805,495
18 to 29	875,143	82.2	788,103
30 to 39	983,396	77.4	907,750
40 to 49	2,044,079	81.3	1,912,290
50 to 64	4,521,642	81.7	4,197,263
TTW Participant Sample	54,431	84.4	53,635
Phase 2 Cross-Sectional	28,315	84.5	27,933
Milestone-Outcome	3,301	79.8	3,260
Outcome-Only	884	74.2	846
Traditional	24,131	85.7	23,828
Phase 3 Cross-Sectional	26,116	84.2	25,702
Milestone-Outcome	3,716	84.3	3,654
Outcome-Only	518	74.0	512
Traditional	21,882	84.4	21,536
Total Sample	8,478,689		7,859,130

Source: 2006 National Beneficiary Survey.

Note: To support cross-sectional analyses of Phase 1 participants in 2005 and to maximize precision for these analyses, Phase 1 longitudinal cases that were still TTW participants at Round 2 were combined with the Phase 1 supplement sample to produce Phase 1 cross-sectional weights and response rates.

Table 7. Final Weighted Response Rates by Sampling Strata for the Longitudinal Participant Sample

Sample Type	Weighted Count of Responded (Completed + Ineligibles)	Weighted Percent	Weighted Count of Completed Interviews
Longitudinal Phase 1	15,787	73.5	15,291
Milestone-Outcome	1,783	76.3	1,637
Outcome-Only	379	66.6	360
Traditional	13,627	75.3	13,295
Longitudinal Phase 2	17,632	83.2	17,166
Milestone-Outcome	2,549	79.5	2,480
Outcome-Only	630	69.5	584
Traditional	14,454	84.6	14,103

Source: 2006 National Beneficiary Survey.

Note: Interviews are defined as “Completed” if they were complete in Round 3. However, longitudinal weights were created based on completed interviews in multiple rounds.

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III. DESCRIPTIVE STATISTICS BASED ON THE NATIONAL CROSS-SECTIONAL SAMPLE

In this section, we provide a set of data tables based on the national cross-sectional sample of the NBS. The tables are intended to provide a fuller accounting of the data behind analyses presented in the other studies that comprise the fifth Ticket to Work evaluation report that utilize the NBS data, and to present statistics based on several new items added to the 2006 NBS questionnaire. The tables contain the following information:

- the weighted and unweighted sample sizes for the subgroups for which descriptive statistics are presented (Table 8)
- descriptive statistics pertaining to beneficiary:
  - characteristics and health status (Tables 9 and 10)
  - sources of support (Tables 12 and 13)
  - service use (Tables 14 and 15)
  - employment-related characteristics, activities, and expectations (Tables 16 through 29)
  - awareness and use of SSA work supports (Table 30).

The statistics presented are reported for all beneficiaries, and separately by program participation status (DI-only, concurrent, and SSI-only). Unless otherwise noted, we used the imputed values for missing data when available, and the appropriate survey weights. Statistics are not reported in instances where the unweighted number of observations for a specific subgroup is equal to 30 or fewer.

Several new survey items were added to the 2006 NBS, and the results are reported here for the first time. These items solicited information from recently employed beneficiaries regarding: whether they informed SSA that they were working when they started their jobs; whether benefit adjustments were required in response to their work activity and if they were asked to repay any benefits; whether any of their SSA or non-SSA benefits were reduced in response to their work activity; whether they worked less than they were able to, and if so, the reasons for doing so; and supports that would help them to work or earn more.

Statistics based on the new survey items are shown in Tables 26–29. Briefly, the findings indicate the following:

- Most recently employed beneficiaries (77 percent) reported having informed SSA about their jobs. Of those, the large majority did so within the first three

months of starting the job. SSI-only beneficiaries were less likely than others to report having informed SSA of their employment (Table 26).

- Among recently employed beneficiaries, SSI-only (39 percent) and concurrent (27 percent) beneficiaries were much more likely than DI-only beneficiaries (5 percent) to report that changes were needed to their SSA benefits in response to their work activity. Of those indicating that such changes were required, about one-third in each group reported that SSA had paid them incorrect benefit amounts (Table 27).

- Among all recently employed beneficiaries, 14 percent reported being asked by SSA to repay benefits because of an overpayment specifically due to their work activity. Recently employed SSI-only (27 percent) and concurrent (22 percent) beneficiaries were much more likely than DI-only beneficiaries (4 percent) to report experiencing an SSA benefit overpayment due to earnings (Table 27).

- Recently employed beneficiaries were asked about benefits (SSA and non-SSA) that were reduced or ceased because of earnings. Overall, 13 percent indicated experiencing benefit reductions. Recently employed SSI-only (22 percent) and concurrent (17 percent) beneficiaries were more likely than their DI-only counterparts (7 percent) to report such reductions. SSA disability benefits and food stamps were the benefits most frequently reported as having been reduced in response to earnings (Table 28).

- About one-fourth (23 percent) of all recently employed beneficiaries said that they worked fewer hours or earned less than they were able. This was more commonly reported among recently employed DI-only (28 percent) and concurrent (23 percent) beneficiaries than among SSI-only beneficiaries (15 percent). Among those reporting not working up to their capabilities, wanting to retain cash and heath care benefits were the most common reasons for doing so (Table 29).

- When asked whether specific supports would help them to work or earn more, recently employed beneficiaries most frequently reported that better job skills (35 percent), help finding a better job (32 percent), flexible work schedule (21 percent), and reliable transportation (18 percent) would help them to work or earn more. In general, SSI-only and concurrent beneficiaries were more likely than DI-only beneficiaries to report that a given support would be useful to increasing their work and earnings (Table 29).

Except for the new items noted above, statistics similar to those reported here have been reported and described based on previous rounds of the NBS, and the findings across rounds have not changed significantly. For additional information from previous NBS rounds and discussion of NBS findings similar to those presented here, the reader is referred to the following reports and papers: Thornton et al. (2004, 2006, and 2007); Livermore et al. (2007); Livermore (2008); Stapleton et al. (2008); and Livermore et al. (2009).

Table 8. Sample Sizes

	All Beneficiaries	DI-only	Concurrent	SSI-only
Number (unweighted)	2,508	894	555	1,059
Number (weighted)	9,645,921	5,052,870	1,680,081	2,912,969
Percent of All (weighted)	100.0	52.4	17.4	30.2

Source: 2006 National Beneficiary Survey.

Table 9. Sociodemographic Characteristics and Living Arrangements

	All Beneficiaries	DI-only	Concurrent	SSI-only
Sex (%)				
Male	49.7	50.8	51.9	46.5
Female	50.3	49.2	48.1	53.5
Age in Years (%)				
18-24	5.1	0.4	4.2	13.9
25-29	3.9	1.1	6.7	7.3
30-34	5.2	2.5	8.6	8.0
35-39	6.3	5.0	10.0	6.5
40-44	10.4	8.8	15.9	10.0
45-49	13.6	13.3	15.9	12.8
50-54	13.9	15.6	11.2	12.5
55-59	18.7	22.7	15.9	13.4
60+	22.8	30.6	11.6	15.7
Mean Age (Years)	49.2	53.4	45.6	44.0
Race (%)				
White only	69.2	77.6	61.3	59.3
Black or African-American only	25.7	18.2	33.2	34.3
Other	5.1	4.2	5.6	6.4
Ethnicity (%)				
Hispanic or Latino	10.8	8.7	12.0	13.8
Not Hispanic or Latino	89.2	91.3	88.0	86.2
Highest Grade in School (%)				
Did not complete HS or GED	39.6	29.9	46.9	52.3
High school	36.0	36.8	36.2	34.7
Diploma	25.0	26.9	22.2	23.5
GED	6.9	6.8	7.4	6.6
Certificate	4.1	3.0	6.5	4.6
Some college/postsecondary vocational	10.9	13.5	10.6	6.6
Associates or vocational diploma	6.4	9.2	3.6	3.1
Bachelor's degree	5.3	8.2	1.9	2.3
Graduate or professional work/degree	1.7	2.3	0.9	1.0

Table 9 (*continued*)

	All Beneficiaries	DI-only	Concurrent	SSI-only
Marital Status (%)				
Married	30.9	44.9	13.7	16.4
Divorced	21.2	22.8	18.2	20.1
Separated	7.1	4.6	11.0	9.3
Widowed	5.6	6.5	4.6	4.7
Never married	35.2	21.2	52.5	49.5
Household Income as a Percent of Federal Poverty Level (%)				
<100	50.3	31.3	70.6	71.6
100 - 299	37.6	50.2	26.2	22.5
300 +	12.0	18.4	3.3	5.9
Living Arrangement (%)				
Lives alone	23.0	22.1	28.7	21.2
Lives with spouse, partner, or relatives	63.8	68.6	52.5	61.8
Lives with friends or roommates	4.8	3.2	6.2	6.6
Lives in group setting with non-relatives	7.7	5.4	12.3	9.1
Other	0.8	0.6	0.2	1.4
Own Children (%)*				
No children	77.5	79.3	78.6	73.8
Has children	21.7	19.6	20.6	25.9
Unknown	0.8	1.1	0.8	0.3
Child Living Arrangements (%)				
Lives with all or some of own children*	15.7	15.3	14.8	16.9
Does not live with any of own children*	6.0	4.3	5.9	9.0
Not applicable – no children	77.5	79.3	78.6	73.8
Unknown	0.8	1.1	0.8	0.3
Children under Age 6 (%)				
Has children under age 6	4.2	2.5	5.3	6.3
No children under age 6	17.9	17.6	15.8	19.8
Not applicable – no children	77.6	79.3	78.6	73.9
Unknown	0.4	0.5	0.3	0.1

Source: 2006 National Beneficiary Survey.

*Own children defined as biological, adoptive, and/or foster care children of the respondent

Table 10. Health Status

	All Beneficiaries	DI-only	Concurrent	SSI-only
Self-Reported Reason(s) for Limitation (%)*				
Musculoskeletal	36.0	43.1	25.9	29.6
Mental illness	32.8	28.8	34.3	38.7
Diseases of the circulatory system	21.0	25.3	15.4	16.9
Endocrine/nutrition disorders	16.4	18.7	15.4	12.8
Diseases of the nervous system	16.6	18.0	15.4	14.8
Injury or poisoning	11.4	14.3	6.8	9.2
Diseases of the respiratory system	8.2	7.1	7.3	10.7
Sensory disorders	9.2	8.8	10.8	9.2
Mental retardation	7.2	3.1	14.4	10.2
Other	35.0	34.4	37.6	34.5
No conditions limit activities	6.3	5.1	7.0	8.0
Number of Conditions Causing Limitation (%)				
0	6.3	5.1	7.0	8.0
1	28.7	26.6	32.3	30.3
2	38.2	39.9	37.2	35.6
3	16.4	17.4	13.5	16.4
4 or more	10.4	11.0	10.1	9.6
Substance Abuse (%)	5.9	5.4	6.0	6.7
Age (in years) at Disability Onset (%)				
<18	24.9	12.0	36.8	40.4
18 - 24	9.9	8.7	12.0	10.7
25 - 39	22.2	22.4	21.5	22.2
40 - 54	32.2	41.8	21.9	21.4
55+	10.9	15.2	7.8	5.2
General Health (%)				
Excellent	3.8	2.4	3.6	6.3
Very Good	6.8	5.7	7.4	8.3
Good	16.7	15.3	21.6	16.5
Fair	29.4	30.2	27.1	29.5
Poor	28.2	31.2	25.8	24.5
Very Poor	15.0	15.2	14.5	14.8

Table 10 (*continued*)

	All Beneficiaries	DI-only	Concurrent	SSI-only
Current Health Compared to Last Year (%)				
Much better	4.0	3.3	5.6	4.4
Somewhat better	9.5	7.9	11.0	11.5
About the same	44.9	43.7	47.4	45.6
Somewhat worse	27.3	30.6	20.8	25.4
Much worse	14.2	14.6	15.2	13.0
Body Mass Index (%)				
<18.5 (underweight)	3.4	2.7	2.6	5.1
18.5-24.9 (normal weight)	27.4	24.6	30.4	30.4
25.0 - 29.9 (overweight)	30.4	34.5	26.8	25.3
30 + (obese)	38.8	38.2	40.2	39.2

Source: 2006 National Beneficiary Survey.

*Multiple responses possible.

Table 11. Difficulty with Specific Activities

	All Beneficiaries	DI-only	Concurrent	SSI-only
Difficulty with Specific Activities (%)				
Activities of Daily Living (ADL)*				
Getting into or out of bed	34.4	35.7	33.5	32.5
Bathing or dressing	30.1	30.0	32.6	28.9
Getting around inside the house	23.4	24.2	23.1	22.4
Eating	14.2	13.4	14.9	15.3
None of the above	48.2	45.8	48.2	52.5
Instrumental Activities of Daily Living (IADL)*				
Getting around outside of the home	47.1	47.3	46.7	46.8
Shopping for personal items	38.6	36.4	43.0	39.8
Preparing meals	37.3	35.1	40.8	39.0
None of the above	38.0	39.2	35.1	37.6
Functional Activities*				
Walking 3 blocks, climbing 10 steps, standing for 1 hr., and/or crouching	85.7	90.3	80.6	80.7
Grasping, reaching, and/or lifting 10 pounds	69.8	76.6	60.0	63.8
Speaking, hearing, and/or seeing	62.8	62.6	59.9	65.0
Coping with stress	60.9	59.8	63.5	61.3
Concentrating	58.3	54.5	62.5	62.4
Getting along with others	26.6	22.8	31.2	30.6
Number of ADL/IADL Difficulties (%)				
0	28.8	28.7	27.0	30.0
1	17.3	17.9	17.5	16.2
2	13.7	13.4	14.0	14.2
3	12.8	13.1	11.3	13.1
4	10.1	10.9	11.3	8.1
5	6.2	5.8	8.0	6.1
6	6.9	6.2	7.3	7.9
7	4.1	4.1	3.8	4.4

Source: 2006 National Beneficiary Survey.

*Multiple responses possible.

Table 12. Program Participation

	All Beneficiaries	DI-only	Concurrent	SSI-only
SSA Program at Sampling (%)				
DI Only	52.4	100.0		
Concurrent	17.4		100.0	
SSI Only	30.2			100.0
Monthly SSA Benefit in Month Before Interview (%)				
< $500	13.3	6.5	14.5	24.3
$500 - $1000	56.9	44.3	73.0	69.3
> $1000	29.9	49.2	12.5	6.4
Mean Monthly SSA Benefit ($)	843.3	1051.2	711.1	558.8
Monthly Non-SSA Benefits (%)				
None	61.0	66.5	54.0	55.6
$1 - $199	20.7	12.3	31.2	29.4
$200 - $499	7.0	6.4	7.5	7.8
$500+	11.2	14.9	7.3	7.2
Mean Monthly Non-SSA Benefits ($)	180.0	246.3	106.9	107.2
Months Since Initial SSA Award (%)				
<24	3.4	4.4	4.5	1.1
24 - 59	18.1	23.1	16.7	10.2
60 - 119	25.1	34.2	14.0	15.8
120+	53.3	38.2	64.8	73.0
Mean Months Since Initial SSA Award	153.0	123.1	191.8	182.5
Income and Assistance in Month Before Interview (%)*				
SSA benefits	95.1	97.1	96.4	91.0
Food Stamps	26.4	12.4	39.1	43.3
Earnings	8.1	9.3	8.4	5.8
Pensions	7.3	12.9	1.4	1.0
Veteran's benefits	4.6	7.6	1.1	1.3
Private disability insurance	3.9	6.6	0.7	1.0
Public cash assistance/welfare	3.9	1.1	5.5	7.7
Workers' Compensation	1.7	3.0	0.3	0.2
Unemployment Insurance	0.2	0.1	0.4	0.2
Other source of income/assistance	3.9	4.0	3.3	4.2

Source: 2006 National Beneficiary Survey matched to SSA administrative data.

*Multiple responses possible.

Table 13. Sources of Health Insurance

	All Beneficiaries	DI-only	Concurrent	SSI-only
Health Insurance at Interview (%)				
Insured	96.1	97.8	93.7	93.4
No insurance	3.4	1.5	5.6	5.5
Unknown	0.5	0.7	0.7	0.1
Sources of Health Insurance at Interview (%)*				
Medicaid or Medicare	89.0	87.5	92.7	89.5
Private insurance	20.5	34.0	4.2	6.5
Other insurance	7.6	11.5	2.8	3.8
No insurance	3.4	1.5	5.6	5.5
Unknown	0.5	0.7	0.7	0.1
Private Insurance				
Number (unweighted)	402	265	30	107
Number (weighted)	1,976,992	1,717,112	70,093	189,787
Percent (weighted)	20.5	34.0	4.2	6.5
Source of Private Insurance (% among those with private insurance)*				
Through own employment	19.8	20.6	**	15.6
Through spouse	57.5	56.8	**	65.0
Self/family purchased	18.1	18.9	**	10.7
Other	3.9	2.9	**	7.9
Unknown	0.8	0.7	**	0.7

Source: 2006 National Beneficiary Survey.

* Multiple responses possible.

** Statistics not reported for subgroups with 30 or fewer observations.

Table 14. Service Use

	All Beneficiaries	DI-only	Concurrent	SSI-only
Ever Used Services				
Ever used services (unweighted N)	1,370	514	313	543
Ever used services (weighted N)	5,041,411	2,714,493	871,723	1,455,195
Ever used services (weighted %)	52.3	53.7	51.9	50.0
Service Types Ever Used (% among those ever using services)*				
Mental health therapy/counseling	57.7	52.9	61.1	64.7
Medical services to improve functioning	54.9	61.6	42.0	50.3
Education/schooling	17.9	12.8	21.7	25.1
Training for new skills/job/career	17.4	16.2	17.5	19.6
Unknown	2.7	2.3	3.6	2.8
Used Services in 2005				
2005 service users (unweighted N)	888	326	209	353
2005 service users (weighted N)	3,181,675	1,663,923	572,191	945,561
2005 service users (weighted %)	33.0	32.9	34.1	32.5
Reason(s) for Using Services in 2005 (% among users)*				
To improve health/wellbeing	77.8	75.9	78.3	80.8
To improve ability to do daily activities	24.0	22.9	27.7	23.9
To find a job or get a better job	9.2	7.0	13.3	10.7
To access specific services	3.7	3.8	4.7	3.0
Someone pressured respondent to use services	3.3	2.9	4.2	3.6
To increase income	2.5	1.9	2.2	3.8
To avoid a continuing disability review	1.0	1.2	0.0	1.4
Other	10.1	10.6	11.0	8.6
Unknown	2.1	2.8	0.6	1.7
Types of Services Used in 2005 (% among users)*				
Medical services	73.6	76.6	64.5	74.0
Personal counseling/group therapy	68.3	67.3	68.7	69.8
Occupational/physical/speech therapy	38.6	40.9	28.6	40.6
Special equipment or devices	24.8	31.9	11.5	20.1
Training/job modification advice/on-the-job training	22.5	18.6	31.6	23.9
Work assessment/help to find a job	21.2	17.5	31.3	21.5
Other	3.4	2.3	5.4	4.1

Source: 2006 National Beneficiary Survey.

* Multiple responses possible.

Table 15. Services Needed but Not Received in 2005

	All Beneficiaries	DI-only	Concurrent	SSI-only
Services Needed in 2005 but Not Received (% among all beneficiaries)				
Yes	8.5	7.2	9.4	10.1
No	89.5	90.6	88.8	88.0
Unknown	2.0	2.1	1.9	1.9
Reason(s) Why Services Were Not Received (% among those with unmet service needs)*				
Could not afford services	19.3	19.0	12.5	23.2
Problems with services/agency	15.3	15.3	10.3	18.0
Wasn't eligible/request refused	13.0	12.7	21.2	9.1
Too difficult/confusing	9.1	10.1	13.2	5.8
Lack of information	8.8	9.8	12.0	5.7
Did not try to get services	2.2	1.4	0.9	3.8
Other	27.2	22.2	29.1	32.5
Unknown	5.1	9.6	0.9	1.8

Source: 2006 National Beneficiary Survey.*Multiple responses possible.

Table 16. Employment

	All Beneficiaries	DI-only	Concurrent	SSI-only
Ever Work for Pay (%)				
Yes	87.7	96.0	85.1	74.8
No	12.1	3.8	14.7	24.9
Unknown	0.2	0.1	0.2	0.3
Employment in 2005				
Worked in 2005	12.9	12.9	15.4	11.4
Did not work in 2005	86.9	87.0	83.9	88.4
Unknown	0.2	0.1	0.6	0.2
Employment Status at Interview (%)				
Employed at interview	9.1	10.1	10.3	6.8
Not employed at interview	90.9	89.9	89.7	93.2
Did not seek work in past 4 Weeks	85.5	86.4	81.0	86.5
Sought work in past 4 weeks	5.2	3.3	8.7	6.6
Unknown if sought work in past 4 weeks	0.2	0.2	0.0	0.1

Source: 2006 National Beneficiary Survey.

Table 17. Reasons for Not Working

	All Beneficiaries	DI-only	Concurrent	SSI-only
Percent not working at interview	90.9	89.9	89.7	93.2
Reasons for Not Working (% among those not working at interview)*				
Physical or mental condition prevents work	90.2	93.2	85.4	87.8
Discouraged by previous work attempts	27.1	27.8	26.6	26.3
Others do not think he/she can work	26.1	27.3	26.8	23.7
Workplaces not accessible	24.4	21.5	26.6	28.1
Cannot find a job he/she is qualified for	24.4	20.5	29.6	27.9
Lacks reliable transportation to/from work	16.6	13.6	17.3	21.2
Does not want to lose cash or health insurance benefits	14.0	13.0	14.0	15.8
Employers will not give her/him a chance	13.9	10.9	17.9	16.6
Cannot find a job he/she wants	10.7	8.8	15.3	11.3
Caring for someone else	6.7	5.2	8.8	8.1
Waiting to finish school/ training program	3.6	1.3	6.3	5.9
Other	3.4	1.8	6.9	4.2

Source: 2006 National Beneficiary Survey

*Multiple responses possible.

Table 18. Hourly Reservation Wages among Nonworking Beneficiaries Seeking Employment or Reporting Reasons Other Than Their Health for Not Working

	All Beneficiaries	DI-only	Concurrent	SSI-only
Percent Asked Reservation Wage Questions	49.1	48.6	50.8	49.1
Hourly Reservation Wage (% among those asked reservation wage questions)				
< $5.15	2.9	1.6	4.6	4.1
$5.16 - $7.99	16.5	10.9	17.4	25.6
$8.00 - $9.99	12.8	11.4	16.3	13.0
$10.00 - $14.99	20.8	23.5	17.8	17.8
$15.00 +	12.7	17.4	8.1	7.3
Unknown	34.4	35.2	35.9	32.2
Average Reservation Wage ($)	11.0	12.4	9.5	9.5

Source: 2006 National Beneficiary Survey.

Note: The hourly reservation wage is the lowest hourly wage for which the respondent would be willing to work. The reservation wage questions were only asked of non-proxy respondents who were not working at interview and who were either seeking work or indicated a reason other than their health for not working.

Table 19. Employment Rates for Specific Beneficiary Subgroups

	All Beneficiaries	DI-only	Concurrent	SSI-only
Employment Rates (%)				
All	9.2	10.1	10.9	6.8
By Age				
18-24	18.2	*	25.9	14.9
25-39	16.8	20.7	19.0	12.7
40-54	9.6	12.7	7.0	5.7
55+	5.0	6.2	7.2	0.0
By General Health Status				
Excellent/very good	28.4	40.1	32.9	15.3
Good/fair	10.7	10.8	13.4	8.8
Poor/very poor	3.0	4.1	1.9	1.3
By Education Level				
Less than high school	6.6	8.3	10.0	3.1
High school	11.1	10.2	12.3	12.0
More than high school	10.9	11.6	10.4	8.0
By Selected Self-Reported Conditions Causing Limitation				
Mental retardation	18.4	16.5	26.5	12.9
Sensory	10.2	13.0	12.5	3.9
Mental illness	9.2	11.6	10.1	5.6
Musculoskeletal	6.1	7.1	4.2	4.7
Circulatory system	5.9	6.9	8.7	1.7
By Age at Disability Onset				
18-24	14.5	19.0	9.4	11.6
25-39	7.5	10.6	5.1	3.4
40-54	5.0	6.9	1.7	0.5
55+	3.3	3.1	*	*
By Difficulty with Selected Activities				
Getting along with others	8.1	8.9	10.0	5.8
Concentrating	7.6	8.3	9.2	5.8
Coping with stress	7.4	8.4	8.4	5.3
Bathing or dressing	4.3	4.9	5.4	2.7
Getting around outside the home	4.0	4.2	5.0	3.2

Source: 2006 National Beneficiary Survey.

* Statistics not reported for subgroups with 30 or fewer observations.

Table 20. Job Characteristics of Employed Beneficiaries

	All Beneficiaries	DI-only	Concurrent	SSI-only
Working at interview (unweighted N)	464	161	123	180
Working at interview (weighted N)	891,571	509,934	182,900	198,738
Working at interview (weighted %)	9.2	10.1	10.9	6.8
Usual Hours Per Week (%)				
1 - 10	24.0	24.1	24.3	23.6
11 - 20	33.2	37.6	35.6	19.6
21 - 34	24.1	25.6	27.2	17.3
35 +	18.7	12.7	12.9	39.6
Average Hours Per Week	21.3	20.3	18.8	25.9
Hourly Wage (%)				
< $5.15	25.2	19.3	39.6	26.9
$5.16 - $7.99	37.1	37.5	41.0	32.6
$8.00 +	37.7	43.2	19.4	40.5
Average Hourly Wage ($)	7.58	8.43	5.41	7.29
Average Monthly Pay ($)	725.1	761.2	416.5	900.2
Earning above Substantial Gainful Activity (>$860/month)(%)	23.3	19.9	13.9	40.7
Occupation (%)				
Transportation and Material Moving	15.3	9.9	25.8	19.6
Production	13.6	12.8	16.7	12.8
Office and Admin Support	11.2	16.0	4.9	4.6
Building & Grounds Cleaning/Maintenance	10.2	7.2	15.1	13.3
Personal Care and Service	8.2	8.0	5.9	11.0
Sales and Related	7.0	10.4	0.0	4.7
Food Preparation/Serving	6.8	4.1	10.9	9.7
Other Occupation	26.2	31.3	15.0	23.5
Unknown	1.5	0.2	5.8	0.8
Industry (%)				
Health Care and Social Assistance	46.6	40.7	58.6	50.8
Retail	10.6	12.8	6.8	8.5
Other Services (except Public Administration)	7.9	11.3	5.5	1.6
Educational Services	4.8	6.1	1.8	4.1
Accommodation and Food Services	4.3	2.1	6.5	7.8
Admin & Support and Waste Mgmt/Remediation	3.1	3.8	2.0	2.5
Other Industry	19.8	22.7	6.4	24.6
Unknown	2.9	0.5	12.4	0.0
Self-Employed (%)				
Yes	8.8	12.2	4.6	3.9
No	91.0	87.5	95.4	96.1
Unknown	0.2	0.3	0.0	0.0

Table 20 (*continued*)

	All Beneficiaries	DI-only	Concurrent	SSI-only
Sheltered Employment (%)				
Yes	34.6	27.5	54.3	35.6
No	59.7	69.1	33.8	58.2
Unknown	5.7	3.4	12.0	6.3
Months at Current Main Job (%)				
< 1 Month	2.1	1.4	1.7	4.6
1 - 6 Months	22.5	24.4	14.6	24.2
7 - 12 Months	13.4	14.8	10.3	12.5
13 - 24 Months	12.3	13.3	11.8	10.1
25 Months +	38.0	37.8	33.5	42.5
Unknown	11.7	8.3	28.1	6.0
Median Months at Current Main Job	18	18	23	18

Source: 2006 National Beneficiary Survey.

Note: The job characteristics reported in the table refer to the characteristics of jobs held by sample members who were employed at interview. Among those who held multiple jobs (2 percent of those employed at interview), the characteristics reported refer to those of the main job, as designated by the respondent.

Table 21. Job-Related Benefits Among Employed Beneficiaries

	All Beneficiaries	DI-only	Concurrent	SSI-only
Job-Related Benefits (% among those not self-employed)				
Health Insurance (%)				
Yes	22.6	20.0	15.2	35.0
No	75.9	78.6	83.8	62.8
Unknown	1.5	1.4	0.9	2.2
Dental Insurance (%)				
Yes	13.6	11.9	8.6	21.8
No	83.8	87.1	85.6	74.5
Unknown	2.7	1.0	5.8	3.8
Flex Health/Dependent Care Spending Account (%)				
Yes	4.3	4.8	2.7	4.7
No	91.4	93.4	92.3	85.8
Unknown	4.3	1.9	4.9	9.5
Sick Days with Pay (%)				
Yes	19.2	20.4	11.5	23.1
No	77.4	77.4	81.8	73.6
Unknown	3.4	2.2	6.7	3.3
Paid Vacation (%)				
Yes	28.6	30.0	21.2	31.8
No	69.6	68.4	77.1	66.0
Unknown	1.8	1.6	1.7	2.2
Long-term Disability Benefits (%)				
Yes	8.6	8.1	5.9	11.9
No	85.5	88.9	84.5	78.3
Unknown	5.9	3.0	9.6	9.7
Pension or Retirement Benefits (%)				
Yes	18.6	18.9	12.4	23.2
No	77.8	79.5	81.9	70.3
Unknown	3.6	1.6	5.7	6.5
Free or Low-cost Child Care (%)				
Yes	2.6	2.9	1.1	3.4
No	91.7	91.0	95.8	89.9
Unknown	5.7	6.1	3.1	6.8
Transportation Allowance or Discounts (%)				
Yes	18.2	11.0	40.1	16.0
No	80.3	87.9	59.9	80.2
Unknown	1.5	1.1	0.0	3.8

Source: 2006 National Beneficiary Survey.

Note: Job-related benefit questions were only asked of sample members working at interview who were not self-employed and refer to benefits associated with the main job (as designated by the respondent) among those with multiple jobs.

Table 22. Job Accommodations and Supports

	All Beneficiaries	DI-only	Concurrent	SSI-only
Working at interview (unweighted N)	464	161	123	180
Working at interview (weighted N)	891,571	509,934	182,900	198,738
Working at interview (weighted %)	9.2	10.1	10.9	6.8
Employer Made at Least One Accommodation (%)**				
Yes	56.7	51.8	71.5	55.3
No	41.6	48.2	22.6	42.4
Unknown	1.8	0.0	5.9	2.4
Types of Accommodations Among Those Who Received Them (%)*/**				
Arranged for co-worker/others to assist	63.2	54.3	78.9	65.0
Changes to work schedule	53.4	71.8	33.0	35.8
Changes to work tasks	36.2	38.2	37.3	30.5
Changes to the physical work environment	34.4	31.5	45.5	28.4
Provided special equipment	7.4	8.7	3.5	8.6
Other	2.4	1.5	2.5	4.2
Changes to Workplace Are Needed (%)				
Yes	4.2	4.0	3.3	5.7
No	94.8	96.0	94.7	91.7
Unknown	1.0	0.0	2.0	2.6
Uses Special Equipment at Work (%)				
Yes	19.6	24.1	11.0	15.6
No	80.4	75.9	89.0	84.4
Types of Equipment Among Users (%)*				
Cane/brace/wheelchair/walker	72.9	***	***	***
Modified computer hardware/software	22.5	***	***	***
Other equipment	36.8	***	***	***
Uses Personal Assistance at Work (%)				
Yes	26.4	20.3	48.2	23.1
No	73.4	79.7	51.8	76.2
Unknown	0.2	0.0	0.0	0.7
Types of Personal Assistance Among Users (%)*				
Job coach	71.0	***	***	62.7
Personal care assistance	18.9	***	***	26.7
Sign language interpreter or reader for blind	8.4	***	***	10.5
Other	5.1	***	***	2.8

Source: 2006 National Beneficiary Survey

* Multiple responses possible.

** Questions were asked of employed sample members who were not self-employed.

*** Statistics not reported for subgroups with 30 or fewer observations.

Table 23. Job Satisfaction

	All Beneficiaries	DI-only	Concurrent	SSI-only
Non-proxy respondent working at interview (unweighted N)	200	100	34	66
Non-proxy respondent working at interview (weighted N)	598,826	412,396	64,907	121,523
Non-proxy respondent working at interview (weighted % of all beneficiaries)	6.2	8.2	3.9	4.2
Overall Job Satisfaction (%)				
Very / Somewhat satisfied	90.4	92.3	88.4	84.8
Not very / Not at all satisfied	8.8	7.2	11.6	12.9
Unknown	0.8	0.5	0.0	2.3
Satisfaction with Specific Job Features (%)				
Pay is good				
Agree/Agree Strongly	65.3	66.7	50.3	68.5
Disagree/Disagree Strongly	33.2	32.0	49.7	28.2
Unknown or Not Applicable	1.5	1.2	0.0	3.3
Benefits are good				
Agree/Agree Strongly	30.2	25.8	45.9	37.1
Disagree/Disagree Strongly	48.7	50.5	41.7	46.5
Unknown or Not Applicable	21.0	23.8	12.4	16.4
Job security is good/work is steady				
Agree/Agree Strongly	69.9	69.1	79.7	67.4
Disagree/Disagree Strongly	23.9	23.3	20.3	27.7
Unknown or Not Applicable	6.2	7.6	0.0	5.0
There are chances for promotion*				
Agree/Agree Strongly	30.0	24.3	**	39.7
Disagree/Disagree Strongly	61.2	63.9	**	56.2
Unknown or Not Applicable	8.8	11.8	**	4.1
There are chances to develop abilities				
Agree/Agree Strongly	68.1	67.4	76.5	65.9
Disagree/Disagree Strongly	26.2	26.9	21.1	26.5
Unknown or Not Applicable	5.4	5.7	2.4	6.0
Receives recognition/respect from others				
Agree/Agree Strongly	93.4	94.9	96.1	87.1
Disagree/Disagree Strongly	5.2	4.7	3.9	7.3
Unknown or Not Applicable	1.1	0.4	0.0	4.0
Can work on own if desired				
Agree/Agree Strongly	80.9	82.9	75.7	76.8
Disagree/Disagree Strongly	14.6	12.6	24.3	16.2
Unknown or Not Applicable	4.2	4.5	0.0	5.4

Table 23 (*continued*)

	All Beneficiaries	DI-only	Concurrent	SSI-only
Can work with others/team if desired				
Agree/Agree Strongly	73.8	66.8	91.7	88.0
Disagree/Disagree Strongly	16.6	21.2	8.3	5.8
Unknown or Not Applicable	9.3	12.1	0.0	4.6
Work is interesting/enjoyable				
Agree/Agree Strongly	86.1	87.3	83.0	83.8
Disagree/Disagree Strongly	12.5	11.9	17.0	12.3
Unknown or Not Applicable	1.0	0.8	0.0	2.3
Work gives feeling of accomplishment				
Agree/Agree Strongly	94.8	98.3	93.8	83.5
Disagree/Disagree Strongly	3.1	0.8	6.2	9.3
Unknown or Not Applicable	1.7	0.9	0.0	5.6
Supervisor is supportive*				
Agree/Agree Strongly	87.7	92.3	**	71.8
Disagree/Disagree Strongly	8.1	7.3	**	12.1
Unknown or Not Applicable	3.8	0.4	**	14.3
Co-workers are friendly and supportive				
Agree/Agree Strongly	85.2	85.6	89.9	81.4
Disagree/Disagree Strongly	5.0	4.7	10.1	3.6
Unknown or Not Applicable	9.4	9.8	0.0	13.4

Source: 2006 National Beneficiary Survey.

Note: Job satisfaction questions were asked of non-proxy respondents working at interview.

* Question was not asked of those who were self-employed.

** Statistics not reported for subgroups with 30 or fewer observations.

Table 24. Employment Expectations

	All Beneficiaries	DI-only	Concurrent	SSI-only
Goals Include Work/Career Advancement (%)				
Yes	34.0	28.6	42.3	38.6
No	63.8	69.3	55.9	58.9
Unknown	2.2	2.1	1.7	2.5
Sees Self Working for Pay:				
In the Next Year (%)				
Agree/Strongly Agree	20.6	17.8	28.6	20.8
Disagree/Strongly Disagree	76.6	79.4	68.5	76.5
Unknown	2.8	2.8	2.9	2.7
In the Next Five Years (%)				
Agree/Strongly Agree	28.2	22.8	39.2	31.3
Disagree/Strongly Disagree	66.9	71.7	56.5	64.4
Unknown	4.9	5.5	4.3	4.3
Sees Self Working and Earning Enough to Stop Receiving Disability Benefits:				
In the Next Year (%)				
Agree/Strongly Agree	6.9	4.6	10.2	8.9
Disagree/Strongly Disagree	13.1	12.8	18.0	10.8
Not applicable - does not see self working in next year	79.4	82.2	71.4	79.2
Unknown	0.6	0.4	0.4	1.1
In the Next Five Years (%)				
Agree/Strongly Agree	16.1	12.7	21.1	19.2
Disagree/Strongly Disagree	10.8	9.0	16.6	10.6
Not applicable - does not see self working in next five years	71.8	77.2	60.8	68.7
Unknown	1.3	1.1	1.6	1.5

Source: 2006 National Beneficiary Survey.

Table 25. Summary of Employment-Related Activities and Expectations

	All Beneficiaries	DI-only	Concurrent	SSI-only
Work-Related Activities (%)				
Working at interview	9.2	10.1	10.9	6.8
Worked during previous year	12.9	12.9	15.4	11.4
Looked for work in past 4 weeks	5.2	3.3	8.7	6.6
Any of the above work-related activities	*17.5*	*16.1*	*22.4*	*17.0*
Employment Service and Training-Related Activities (%)				
Not working because waiting to finish school/training program	3.2	1.2	5.7	5.5
Used employment-specific services in previous year	9.7	8.7	13.4	9.2
Used employment and/or other services in previous year for purpose of getting a job or increasing income	3.3	2.6	4.7	3.6
Any of the above employment/training-related activities	*12.9*	*10.3*	*18.4*	*14.3*
Work-Related Goals and Expectations (%)				
Goals include work/career advancement	34.0	28.6	42.3	38.6
Sees self working for pay in the next year	20.6	17.8	28.6	20.8
Sees self working for pay in the next 5 years	28.2	22.8	39.2	31.3
Sees self working and earning enough to stop receiving disability benefits in the next 5 years	16.1	12.7	21.1	19.2
Any of the above goals/expectations	*43.7*	*38.0*	*54.5*	*47.4*
Any of the Above (%)	47.9	42.6	56.4	52.3

Source: 2006 National Beneficiary Survey.

Table 26. SSA Notification of Work Activity Following Job Start Among Beneficiaries Employed at Interview

	All Beneficiaries	DI-only	Concurrent	SSI-only
Employed at interview*				
Number	879,741	508,696	172,307	198,738
Percent of all beneficiaries	9.1	10.1	10.3	6.8
Informed SSA when started current job (%)				
Yes	77.2	79.1	86.6	64.1
No	19.2	18.8	7.4	30.6
Unknown	3.6	2.1	6.0	5.4
Of those who informed SSA, how soon after job start they told SSA about current job (%)				
< 1 month after start	71.5	74.5	55.8	80.4
1 - 3 months after start	16.6	17.7	17.8	11.8
4 - 12 months after start	1.4	0.0	4.6	2.0
>12 months after start	0.0	0.0	0.0	0.0
Unknown	10.5	7.9	21.8	5.8

Source: 2006 National Beneficiary Survey.

*Statistics produced using unimputed values.

Table 27. SSA Benefit Adjustments in Response to Work Activity Among Recently Employed Beneficiaries

	All Beneficiaries	DI-only	Concurrent	SSI-only
Employed at interview or during the previous calendar year*				
Number	1,322,779	695,551	265,410	361,819
Percent of All	13.7	13.8	15.8	12.4
Changes needed to SSA benefits due to work activity (%)				
Yes	18.9	5.1	27.2	39.4
No	66.1	80.8	57.3	44.4
Unknown	15.0	14.1	15.5	16.3
Among those indicating changes needed, SSA paid wrong benefit amount (%)				
Yes	33.9	29.4	35.4	34.2
No	61.0	51.5	62.9	62.4
Unknown	5.1	19.1	1.7	3.4
Beneficiary was asked to repay SSA benefits because of overpayment (%)				
Yes, overpayment due to work	13.6	3.6	21.9	26.8
Yes, overpayment due to other reason	3.7	1.1	4.5	8.2
No	67.4	82.1	52.3	50.4
Unknown	15.2	13.2	21.2	14.6

Source: 2006 National Beneficiary Survey.

*Statistics produced using unimputed values.

Table 28. Benefits Reduced or Ended Due to Work Activity Among Recently Employed Beneficiaries

	All Beneficiaries	DI-only	Concurrent	SSI-only
Employed at interview or during the previous calendar year*				
Number	1,322,779	695,551	265,410	361,819
Percent of all beneficiaries	13.7	13.8	15.8	12.4
Disability-related benefits reduced or ended due to work (%)				
Yes	13.1	7.0	17.4	21.8
No	58.8	72.2	53.4	37.2
Unknown	28.0	20.9	29.2	41.0
Benefits affected among those indicating reductions/terminations (%)				
SSA disability benefits	77.3	30.3	90.9	98.2
Food stamps	13.1	28.9	7.5	6.6
Medicaid	9.2	27.0	0.0	3.5
Medicare	9.1	26.7	0.0	3.5
Other	5.5	0.0	8.7	6.9

Source: 2006 National Beneficiary Survey.

*Statistics produced using unimputed values.

Table 29. Work Activity Relative to Work Capacity and Supports That Would Improve Work Capacity Among Recently Employed Beneficiaries

	All Beneficiaries	DI-only	Concurrent	SSI-only
Employed at interview or during the previous calendar year*				
Number	1,322,779	695,551	265,410	361,819
Percent of all beneficiaries	13.7	13.8	15.8	12.4
Worked fewer hours or earned less than was able (%)				
Yes	23.4	27.7	22.9	15.4
No	62.7	59.8	61.2	69.3
Unknown	13.9	12.5	15.9	15.3
Reasons for working or earning less than able among those who did so (%)				
Wanted to keep cash benefits	43.3	45.7	40.0	38.8
Wanted to keep Medicare/Medicaid	40.6	37.5	49.0	42.0
Health reasons	38.0	39.8	35.6	34.2
Taking care of children/others	21.2	20.0	12.5	34.9
Didn't want to work more	20.6	17.2	34.6	17.0
Enrolled in school/training	11.7	4.8	21.9	24.2
Other	20.8	22.2	18.1	19.0
No reasons indicated	8.3	9.1	6.8	7.3
Supports that would help working beneficiaries work/earn more (%)				
Better job skills	35.2	28.6	48.8	37.8
Help finding a better job	31.9	31.6	32.0	32.4
Flexible work schedule	20.6	19.7	24.3	19.7
Reliable transportation to/from work	18.4	16.7	23.7	17.6
Help with personal care	7.2	5.2	10.3	8.9
Help caring for children/others	6.9	7.7	7.5	5.2
Special equipment/devices	4.4	4.4	5.6	3.5
Other	5.5	7.5	2.5	3.8
No supports indicated	45.6	47.0	37.3	49.0

Source: 2006 National Beneficiary Survey.

*Statistics produced using unimputed values.

Table 30. Awareness and Use of SSA Work Supports

	All to Whom Work Support Is Applicable	DI-only	Concurrent	SSI-only
Aware of Work Incentive (%)				
Trial Work Period	36.9	41.7	22.5	*NA*
Ticket to Work	25.5	25.5	29.1	23.4
Extended Period of Medicare Eligibility	20.1	23.3	10.8	*NA*
1619(b) Continued Medicaid Coverage	16.1	*NA*	15.7	16.4
Expedited Reinstatement	14.6	18.7	11.6	9.3
Earned Income Exclusion	12.3	*NA*	9.5	14.0
Plan for Achieving Self Support	11.1	*NA*	11.4	10.9
Benefits Specialist	10.9	12.9	8.7	8.6
Impairment Related or Blind Work Expenses	9.6	12.9	6.3	5.7
Student Earned Income Exclusion*	9.0	*NA*	4.3	9.9
Property Essential for Self Support	4.1	*NA*	5.0	3.6
Used Work Incentive (%)**				
Trial Work Period	8.2	9.8	3.6	*NA*
1619(b) Continued Medicaid Coverage	2.0	*NA*	1.5	2.3
Ticket to Work***	1.8	1.5	2.6	1.9
Earned Income Exclusion	1.7	*NA*	1.6	1.8
Student Earned Income Exclusion*	1.7	*NA*	2.8	1.5
Expedited Reinstatement	1.2	1.1	1.1	1.3
Plan for Achieving Self Support	1.2	*NA*	1.6	0.9
Benefits Specialist	1.0	1.3	0.8	0.8
Extended Period of Medicare Eligibility	0.7	0.7	0.8	*NA*
Property Essential for Self Support	0.3	*NA*	0.7	0.0
Impairment Related or Blind Work Expenses	0.2	0.2	0.3	0.1

Source: 2006 National Beneficiary Survey.

* Awareness and use rates calculated as a percentage of SSI recipients age 25 and under who began receiving benefits before age 22.

** Respondent report of ever using the provision, with the exception of TTW.

***TTW use rate is the participation rate in the Phase 1 (early rollout) states based on administrative data as of December 2005 (Stapleton et al. 2008).

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