

**ATTACHMENT C**

**SEMI-STRUCTURED INTERVIEW RECRUITMENT SCRIPT AND GUIDE**



**ATTACHMENT C1**  
**SCREENER INTERVIEW**



## NBS QUALITATIVE INTERVIEW RECRUITMENT PROTOCOL

*The script is intended to recruit current and former SSI and SSDI beneficiaries for interviews about barriers and facilitators to employment and benefit independence. The information collected will be used to deepen SSA's understanding of factors that impact employment success, including people, programs, and employers, among other things.*

*We will obtain a sample of SSI and SSDI beneficiaries from SSA who, based on SSA administrative data: 1) Had high earnings in the recent past and are likely to still have high earnings; 2) Had high earnings in the recent past but are likely to no longer have high earnings; and 3) are under age 30 and likely to be employed.*

*During the initial recruiting phone call we will explain the study goal, gain interest, verify the sampled person's name, address, and phone number, and determine the sample person's employment and benefit status. The verification of previous/current employment, suspense status due to work, and current benefit receipt status is will allow us to target the appropriate number of interviews to each of the three groups of interest. This is necessary because SSA administrative data will not contain current information on these characteristics.*

*We will recruit with the goal of obtaining a maximum of 30 individuals with high earnings who have sustained high earnings (including some individuals who are in current suspense status due to work), a maximum of 30 who had high earnings but whose earnings have declined or ceased (including some who previously had benefits suspended due to work but how have returned to benefits), and 30 youth who are working. We will also attempt to achieve approximately one-half of interviewees to be current/former SSI recipients and one-half to be current/former SSDI beneficiaries in each group*

*Note: If beneficiaries attempt to ask questions about their benefits at any point during the discussion: I'm sorry. I am not an expert on [Social Security disability benefits/Medicare/Medicaid]. So I cannot answer questions or give advice about disability benefits or your personal circumstances.*

### A. Recruitment

Hi, my name is \_\_\_\_\_, and I work for a company called Mathematica Policy Research. May I please speak with (beneficiary name)?

*If not available, arrange callback.*

*If gatekeeper says not intellectually capable, explain the goals of the interview and that it is designed for people like their household member. Determine from gatekeeper if the beneficiary has been employed during the past year, the earnings trajectory over the year; and whether he or she had been/is off benefits due to work. If meets the study criteria, determine if he or she could likely handle the interview. Suggest that gatekeeper could help beneficiary answer the questions if that permits he or she to participate. If beneficiary comes onto line, reintroduce and continue.*

I am contacting you today because we are doing a study for the Social Security Administration. The study is about how people with disabilities find and keep jobs. As a thank-you we will send you your choice of a \$20 gift card from Wal-Mart or Target for talking to us. The gift card will not affect your benefits in any way if you are receiving any. We would like to talk with you by telephone for about 30-40 minutes at a time that is good for you.

What we learn from you will help the Social Security Administration do a better job of serving individuals with disabilities through its benefit programs in the future.

Would you be willing to help us with our study? [*Regardless of answer, continue with next paragraph*].

Your participation in this call will be voluntary. Whether or not you participate will have no effect on your Social Security benefits now or in the future. There is no risk to you participating. You can stop the interview at any time. You also do not have to answer any question you don't feel comfortable answering.

[If reluctant]: We would really appreciate your help with our study. It is only by talking to people like you that SSA can understand what works and what doesn't work for people who may be trying to work and get off benefits. Would you be willing to talk to us? We want to talk to you whether or not you are currently receiving cash benefits.

[If still reluctant] Is there any information I can provide to relieve any concerns you have? *If yes, provide information or offer to provide SSA contact for more information: Elaine Gilby, 202-358-6449, [elaine.gilby@ssa.gov](mailto:elaine.gilby@ssa.gov) if legitimacy of the study is a concern.*

[If no, terminate call.]

[If agrees to participate] Thank you for helping us with our study. [Go to Section B screening questions]

## B. Screening Questions

Before we schedule an interview, I want to confirm some information and ask you a few questions to make sure you are eligible for our study.

1. I have your name as \_\_\_\_\_. Is this correct?

2. I have your age as \_\_\_\_\_. Is this correct?

3. Are you currently working for pay?

Yes: \_\_\_\_\_

No: \_\_\_\_\_

4. Did you work at a job for pay at any time during the past year (since last \_\_\_\_\_)?

Yes: \_\_\_\_\_ [Continue to 5]

No: \_\_\_\_\_ [Go to screener termination Section D]

5. Thinking about how much money you made from working over the past year (since last \_\_\_\_\_), would you say the amount of money you make now:

Is about the same: \_\_\_\_\_ (sustained earnings)

Has gone up since last year: \_\_\_\_\_ (sustained and improved earnings)

Has gone down since last year: \_\_\_\_\_ (earnings declined)

Has gone up and down over the year: \_\_\_\_\_ (earnings unstable)

**6. I understand that in the past you received Social Security disability benefits. During the past year, were your benefits reduced or ended because you worked?**

Probe if necessary: By Social Security disability benefits I mean either Supplemental Security Income or SSI, or Social Security Disability Insurance or SSDI

Yes: \_\_\_\_\_

No: \_\_\_\_\_

**7. Are you currently receiving disability benefits?**

Yes: \_\_\_\_\_ [Continue to Scheduling Section C]

No: \_\_\_\_\_ Did your benefits end because you were working or because of some other reason?

Never on benefits: \_\_\_\_\_ [Go to screener termination Section D]

Off benefits for reason other than work: \_\_\_\_\_ [Go to screener termination Section D]

Off benefits due to earnings: \_\_\_\_\_ [Continue to Scheduling Section C]

**C. Schedule Eligible Respondent**

- 1. When would be a good time for us to call you? The call would take about 30 to 40 minutes. *(Refer to times available on interview calendar, if none convenient to beneficiary, write down generally convenient times and say that we will call them back to confirm a time)*

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- 2. Is the phone number we are talking to you on now the best one to use or should we call another number?

This one (note number dialed) \_\_\_\_\_

Other \_\_\_\_\_

That’s all of the information I need right now. One of my colleagues, Stephanie or Denise, will call on (appointment time) to speak with you. Thanks again. Have a great day. [Complete Summary table in Section E.]

### D. Termination for Ineligible Respondents

Based on the information you have given me, it appears that you are not eligible to participate in our study. Thank you for taking the time to answer my questions. Goodbye.

### E. Summary Characteristics for Targeting Interviews with Eligible Respondents

<b>Characteristics Based on Phone Screen</b>	<b>YES</b>
Under age 30	
Currently employed, earnings stable/increased over past year	
Currently employed, earnings unstable/declined over past year	
Not currently employed, but worked in past year	
Benefits currently suspended due to earnings	
Benefits suspended due to earnings in past year, but not currently suspended	



**ATTACHMENT C2**  
**INTERVIEW GUIDE**



## NBS – QUALITATIVE INTERVIEW GUIDE

*The following protocols are intended to elicit information from SSI and SSDI beneficiaries about facilitators and barriers to employment and benefit independence. The information collected will be used to help SSA better understand the personal, environmental, and employment factors that help or hinder beneficiaries in their effort to find and keep a job.*

*Beneficiaries will be recruited and screened for the interviews by telephone. We will obtain a sample from SSA of SSI, SSDI, and concurrent beneficiaries who have achieved high earnings in the prior year and were or were not able to sustain high levels of earnings. We will also recruit a group of young beneficiaries (under age 30) who were employed during the prior year. During the initial recruitment call, we will verify the sampled person's name, age, address, and phone number, and determine whether the sample person receives benefits, has had their benefits reduced or suspended due to work, is employed, and if employed, the level of their current earnings relative to the prior year. We will confirm employment and benefit status again at the beginning of the interview.*

*The following protocols are intended to elicit information from SSI and SSDI beneficiaries about facilitators and barriers to employment and benefit independence. The first protocol (Section II) will be administered to beneficiaries (including youth) who achieved high earnings during the prior year but were not able to sustain them. The second protocol (Section III) will be administered to beneficiaries who achieved high earnings and were able to sustain them.*

*Note: If beneficiaries attempt to ask questions about their benefits at any point during the discussion: I'm sorry. I am not an expert on [Social Security disability benefits/Medicare/Medicaid], so I cannot answer questions or give advice about disability benefits or your personal circumstances. If you'd like, you can call the SSA toll-free number. That number is 1-800-772-1213 or TDD 1-800-325-0778.*

### Information from Initial Screen

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Program sample (SSI or SSDI): \_\_\_\_\_

Characteristics Based on Phone Screen	YES
Under age 30	
Currently employed, earnings stable/increased over past year	
Currently employed, earnings unstable/declined over past year	
Not currently employed, but worked in past year	
Benefits currently suspended due to earnings	
Benefits suspended due to earnings in past year, but not currently suspended	

## INTRODUCTION

[After scheduled interviewee is on the line] Hello, this is \_\_\_\_\_ from Mathematica Policy Research. I was told that this is a good time for you to talk. I am calling to talk with you to learn more about the things that help people with disabilities find work and continue working. The Social Security Administration wants to learn how well their programs meet the needs of people like you. We know how hard it is to find and keep jobs so we would like to understand how you were able to reach your success. We want to learn about what worked in helping you to succeed and anything that made it hard for you to keep working.

My questions will take about 30 to 40 minutes to answer. As a thank you for talking with me, we will send you a \$20 gift card to your choice of either Target or Wal-Mart. The gift card will not affect your benefits in any way if you are receiving any. At the end of our talk, I will make sure I have your right address for mailing the gift card.

You can choose not to answer any questions you don't want to. Your answers will be kept strictly confidential and our reports will not use your name or identify you personally. Further, SSA will not use this information to decide whether you can stay on disability benefits. We are talking to you only to collect information for research. This call will be recorded so that I can refer to it when writing up my interview report. Is it OK to begin now?

## I. CONFIRM CURRENT EMPLOYMENT AND BENEFIT STATUS

First, I would like to confirm the information you told us previously.

Characteristics Based on Phone Screen	YES
Currently employed, earnings stable/increased over past year	
Currently employed, earnings unstable/declined over past year	
Not currently employed, but worked in past year	
Benefits currently suspended due to earnings	
Benefits suspended due to earnings in past year, but not currently suspended	

### If currently employed based on phone screen:

1a. I understand that you are now working at a job for pay. Is that correct?

If yes, continue to 1b.

*If no, clarify status and continue to 1b or 2 as appropriate.*

PROBE: What is your current situation?

1b. I also understand that, over the past year...*(continue as appropriate)*

The money you have earned from working has been steady or has gone up. Is that correct?

OR

The money you have earned from working has not been steady or has gone down. Is that correct?

*If correct, continue to: 3(if benefits currently suspended or suspended in the past year) or 4 (otherwise)*

*If not correct, clarify status and continue to 2 (if not working) or 3 (otherwise) as appropriate. Terminate interview if never worked while on benefits or does not acknowledge ever receiving benefits.*

PROBE: What is your current situation?

**If not employed based on phone screen or above:**

2. I understand that you are not working now, but that you worked in the past while receiving Social Security disability benefits. Is that correct?

*If correct, continue to: 3 (if benefits currently suspended or suspended in the past year) or 4 (otherwise)*

*If not correct, clarify status and continue if appropriate. Terminate interview if never worked while on benefits or does not acknowledge ever receiving benefits.*

PROBE: What is your current situation?

3. You also told us that...(continue as appropriate)

You are not receiving Social Security benefits because you are working. Is that correct?

OR

You are now receiving Social Security benefits, but during the past year, your benefits were stopped because you were working. Is that correct?

*If correct, continue to 4*

*If not correct, clarify status and continue if appropriate. Terminate interview if never worked while on benefits or does not acknowledge ever receiving benefits.*

**All respondents:**

4. When did you last get disability benefits from Social Security?

PROBES:

This includes either Social Security Disability Insurance (SSDI) or Supplemental Security Income (SSI).

Your best estimate is fine [approximate timeframe is OK, probe regarding how many months/years ago last received benefits].

5. How old were you when you first became limited in the kind or amount of work or other daily activities you could do? Your best guess is fine.

***Interviewer:***

***If recently employed but earnings have declined or stopped, go to Section II***

***If currently employed with steady/increasing earnings, go to Section III***

## II. EMPLOYED DURING PAST YEAR BUT EARNINGS DECLINED OR STOPPED

Responses to all open-ended items should be followed with standard probes such as: “Please tell me more about that.” “And then what?” “How did that happen?” and “Anything else?”.

Use the subquestions and probes following each open-ended question below as needed to elicit more detail from the respondent.

*If under age 30, go to Section A; otherwise, Skip to Section B*

### A. School and Early Work Experience among Those Under Age 30

*If first became limited before age 24, go to #1; otherwise, skip to #2*

1. Did have a disability make it difficult for you to go to school or to finish school? Why or why not?

a. Did you graduate from high school?

b. (if graduated high school) Did you ever go to college or vocational school after high school? Did you graduate?

c. What kinds of things helped you with your disability while you were in [high school/college]?

d. (if applicable) Why didn't you graduate from [high school/college]?

2. How old were you when you first started receiving disability benefits?

3. (If appropriate based on age of first benefit receipt) Did you ever have a steady job before you went on benefits?

If yes: Were any of the jobs you had in your chosen field or career at the time, or did you consider them just temporary jobs?

If worked in chosen field/career: Has your disability caused you to change the types of jobs you can do or to change your career? If so, how and why?

### B. Initial Work Attempts/Starting to Work (ALL)

1. [Now] I would like to [start by asking/ask] you to think back to the time when you most recently began working. How and why did that happen?

*Address the following questions if not covered in answers to questions above:*

a. Why did you want to work? What led you to make that decision?

b. What steps did you take to start work?

- c. How did you go about finding a job and starting to work? Who helped you?
- d. How did you find your job? Was it difficult to find a job? Why? What barriers did you face?
- e. Did you get any services to help you find a job or get ready for work? How important were these things in helping you get back to work at the beginning?
- f. Was getting off benefits a goal? What led you to make that decision?
- g. Were you worried about losing benefits or overpayments if you worked?

If so, did your concern about losing benefits or overpayments affect the type of job you looked for or the amount of time you were willing to work?

- 2. Why did this job work out for you (willing company, accommodation, transportation, OJT program)?
- 3. Why did you start working when you did?
  - Did something change? (Health, access to transportation, finished school, needed more money)
- 4. What was most important in helping you start working?
- 5. What help or supports did you use or receive, if any?

*Probe with a few examples from the following list, if needed.*

<b>Training/Rehabilitation</b>	<b>Employer-Related Supports</b>	<b>Other Supports</b>
<ul style="list-style-type: none"> <li>• Training or education</li> <li>• Job search assistance</li> <li>• Vocational rehabilitation</li> <li>• Assistive equipment/ devices</li> </ul>	<ul style="list-style-type: none"> <li>• Company willing to hire</li> <li>• Company willing to accommodate</li> <li>• Company allowed part-time/ flexible schedule</li> <li>• Company allowed work from home</li> <li>• Support from coworkers/boss</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance from family/friends</li> <li>• Assistance from church/charity/ other private organization</li> <li>• Assistance from counselor/case manager</li> <li>• Help with personal care</li> <li>• Reliable transportation</li> <li>• Child or elder care</li> </ul>

- 6. Is there anything else that we didn't talk about that you think was important to your being able to start working?



### C. While Working

1. Now I would like to ask you about how things went for you after you started working. How did it go? What was it like when you were working?

*Address the following questions if not covered in answers to questions above:*

- a. What things went well and helped you to work when you had this job?
- b. What were the most important things that helped you work when you had your job?
- c. What supports did you use or receive, if any?

*Probe with a few examples from the following list, if needed.*

<b>Training/Rehabilitation</b>	<b>Employer-Related Supports</b>	<b>Other Supports</b>
<ul style="list-style-type: none"> <li>• Training or education</li> <li>• Job search assistance</li> <li>• Vocational rehabilitation</li> <li>• Assistive equipment/ devices</li> </ul>	<ul style="list-style-type: none"> <li>• Company willing to hire</li> <li>• Company willing to accommodate</li> <li>• Company allowed part-time/ flexible schedule</li> <li>• Company allowed work from home</li> <li>• Support from coworkers/boss</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance from family/friends</li> <li>• Assistance from church/charity/ other private organization</li> <li>• Assistance from counselor/case manager</li> <li>• Help with personal care</li> <li>• Reliable transportation</li> <li>• Child or elder care</li> </ul>

- d. What was your biggest work-related challenge? Why? How did you deal with this?
- e. What other issues did you face with working?

2. Is there anything else that we didn't talk about that you think was important in helping you to keep working when you had this job?

### D. Reducing or Ending Work

You told me earlier that....

You are no longer working.

OR

You have been working less over the past year.

OR

Your work has been up and down over the past year.

2. What were the most important reasons [you started working less /you stopped working/your work has not been steady]? Why?

*Probe with a few examples from the following list, if needed.*

**Personal**

- Child or elder care issues
- Transportation issues
- Housing issues
- Needed assistive equipment or a device
- Getting ready took too long
- Change in health or functioning
- People who were helping stopped

**Employer or Work-Related**

- Needed accommodations
- Problems with physical workspace (accessibility)
- Schedule was too taxing, too many hours
- Job was too stressful, hard, couldn't handle it
- Dissatisfied with job
- Got fired or laid off

3. What might have helped you to [stay working /stay working the same amount]?

4. Were you worried about losing benefits?

a. If so, why is it important to you not to lose benefits? What do you worry will happen if you lose them?

b. What about other benefits like Medicare/Medicaid, food stamps, welfare/TANF, housing?

5. Were you worried about overpayments?

a. Have you ever received an overpayment notice from Social Security? If yes, what happened and how was it resolved?

b. If worried but never received overpayment: What do you worry will happen if you receive an overpayment notice?

6. Is there anything else that we didn't talk about that you think was important when thinking about why [you started working less/you stopped working/ your work is not steady]?

### **E. Future Work Efforts**

1. I would like to end by asking you about whether you think you will [go back to work/work more] in the future? Why or why not?

a. What will affect your decision?

b. What would have to be different for you to be able to [start working again/work more]?

c. What supports do you need that you do not have?

2. Is there anything else we didn't talk about that you think would be important for you to [work again/work more]?

### **F. Other**

1. Before we end, is there anything else you would like to tell me or that you think I should know about your experiences working, getting off benefits, and going back on benefits?

*Go to Section IV. Interview Termination*

### III. EMPLOYED WITH SUSTAINED/INCREASED EARNINGS

Responses to all open-ended items should be followed with standard probes such as “Please tell me more about that.” “And then what?” “How did that happen?” and “Anything else?”.

Use the subquestions and probes following each open-ended question below as needed to elicit more detail from the respondent.

*If under age 30, go to Section A; otherwise, Skip to Section B*

#### A. School and Early Work Experience among Those Under Age 30

*If first became limited before age 24, go to #1; otherwise, skip to #2*

1. Did have a disability make it difficult for you to go to school or to finish school? Why or why not?

a. Did you graduate from high school?

b. (if graduated high school) Did you ever go to college or vocational school after high school? Did you graduate?

c. What kinds of things helped you with your disability while you were in [high school/college]?

d. (if applicable) Why didn't you graduate from [high school/college]?

2. How old were you when you first started receiving disability benefits?

3. (If appropriate based on age of first benefit receipt) Did you ever have a steady job before you went on benefits?

If yes: Were any of the jobs you had in your chosen field or career at the time, or did you consider them just temporary jobs?

If worked in chosen field/career: Has your disability caused you to change the types of jobs you can do or to change your career? If so, how and why?

#### B. Initial Work Attempts/Starting to Work (ALL)

1. [Now,] I would like to start by asking you to think back to the time when you started working at your current job. How and why did that happen?

*Address the following questions if not covered in answers to questions above:*

a. Why did you want to work? What led you to make that decision?

b. How did you go about finding a job and starting to work? Who helped you?

c. How did you find your job? Was it difficult to find one? Why? What barriers did you face?

d. Did you get any services to help you find a job or get ready for work? How important were these things in helping you get back to work at the beginning?

2. Why did this job work out for you (willing company, accommodation, transportation, OJT program)?

3. Why did you start working when you did?

a. Did something change (health, access to transportation, finished school, needed more money)?

4. What was most important in helping you start working?

5. What supports did you use or receive, if any?

*Probe with a few examples from the following list, if needed.*

<b>Training/Rehabilitation</b>	<b>Employer-Related Supports</b>	<b>Other Supports</b>
<ul style="list-style-type: none"> <li>• Training or education</li> <li>• Job search assistance</li> <li>• Vocational rehabilitation</li> <li>• Assistive equipment/ devices</li> </ul>	<ul style="list-style-type: none"> <li>• Company willing to hire</li> <li>• Company willing to accommodate</li> <li>• Company allowed part-time/ flexible schedule</li> <li>• Company allowed work from home</li> <li>• Support from coworkers/boss</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance from family/friends</li> <li>• Assistance from church/charity/ other private organization</li> <li>• Assistance from counselor/case manager</li> <li>• Help with personal care</li> <li>• Reliable transportation</li> <li>• Child or elder care</li> </ul>

6. Is there anything else that we didn't talk about that you think was important to your being able to start working?

### **C. While Working**

1. Now I would like to ask you about how things went for you after you started working at your current job. How is it going?

*Address the following questions if not covered in answers to questions above:*

a. What things worked well when you first started?

b. What are the most important things that help you work now?

c. What supports did you receive when you first started, and what do you receive now?

*Probe with a few examples from the following list, if needed.*

<b>Training/Rehabilitation</b>	<b>Employer-Related Supports</b>	<b>Other Supports</b>
<ul style="list-style-type: none"> <li>• Training or education</li> <li>• Job search assistance</li> <li>• Vocational rehabilitation</li> <li>• Assistive equipment/ devices</li> </ul>	<ul style="list-style-type: none"> <li>• Company willing to hire</li> <li>• Company willing to accommodate</li> <li>• Company allowed part-time/ flexible schedule</li> <li>• Company allowed work from home</li> <li>• Support from coworkers/boss</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance from family/friends</li> <li>• Assistance from church/charity/ other private organization</li> <li>• Assistance from counselor/case manager</li> <li>• Help with personal care</li> <li>• Reliable transportation</li> <li>• Child or elder care</li> </ul>

d. What has been your biggest work-related challenge? Why? How do/did you deal with this?

e. What other issues have you faced with working?

2. Is there anything else that we didn't talk about that you think was important when you first started working or that is important now to make it so you can keep working?

## **D. Ongoing Work Effort**

1. I would like to ask you about things that might make it easier for you to keep working. What will help you to keep working?

a. Are there any supports you need that you do not have? How would these help you?

2. What kinds of things might make you need or want to work less or stop working?

3. Is there anything else we didn't talk about you think will be important for you to keep working?

*If earnings increased over past year, go to Section E.*

## **E. Earnings Increase (If earnings increased in past year)**

1. Earlier you told me that your earnings have gone up over the past year.

a. Why did they go up?

b. What did you do to increase your earnings?"

*If had benefits suspended in the past year, go to Section F; otherwise skip to Section G.*

## **F. Benefit Suspense**

You told me earlier that.....

You are not receiving disability benefits because you are working.

OR

Your benefits were stopped because you were working, but that you are now back on benefits.

1. Was getting off benefits a goal? What led you to make that decision? What steps did you take to get off benefits?

2. Were you worried about losing benefits?

a. If so, why is it important to you not to lose benefits? What did you worry would happen if you lost them?

b. What about other benefits like Medicare/Medicaid, food stamps, welfare/TANF, housing? Were you worried about losing them?

3. Did Social Security ever notify you that you had an overpayment?

If yes:

a. How much was the overpayment?

b. What did you do to resolve the overpayment?

c. Did the overpayment cause you to change how much or where you worked? How?

*If back on benefits, go to #4; otherwise, skip to Section E*

4. Do you plan to try to get off benefits again in the future? Why or why not?

## **G. Other**

1. Before we end, is there anything else you would like to tell me or that you think I should know about what working [and going off disability benefits] has been like for you?

*Go to Interview Termination*

**IV. INTERVIEW TERMINATION**

That’s all of the questions I have. We really appreciate you taking the time to help us with our study. I want to confirm that we have your correct mailing address so we can send you a \$20 gift card.

Which type of gift card would you like, Target or Wal-Mart?\_\_\_\_\_

Name:\_\_\_\_\_

Address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

You should receive the gift card in the mail within the next two weeks.

Thanks again. Have a great day.