

Addendum to the Supporting Statement for SSA-0800
National Beneficiary Survey - NBS General Waves and Semi-Structured Interviews
OMB No. 0960-0800

Revisions to the Collection Instrument

- **Change #1:** We added new survey items in Section B related to respondents' disability and work status. These questions, which we will administer to all sample members, ask respondents for information about their ability to perform a job prior to receiving benefits; reasons why their health limits work; and reasons why beneficiaries do not believe they will work or leave benefits in the future.

Justification #1: In 2012, we convened a technical support group (TSG). The TSG suggested we attempt to explore in detail the nature of respondents' employment barriers and health-related challenges. These new questions provide context to learn more about why some beneficiaries work at levels that might permit them to eventually leave benefits while others do not.

- **Change #2:** In Section C, we added new survey items related to job characteristics. The new questions address the following topics: motivation to start working; how respondents found their current job; formal and informal supports used to find or keep a current job; features of the job that are helpful in allowing the respondent to work with a disability; and any recent challenges in the current job that could have resulted in stopping work and how they were addressed.

Justification #2: Collecting robust information from beneficiaries about their current jobs will allow SSA to compare the experiences and processes used by beneficiaries who achieve benefit suspense with the experiences and processes used by other working beneficiaries. In addition, it will allow SSA to develop an understanding of supports that beneficiaries use to maintain employment.

- **Change #3:** In Section E, we added new survey items for all sample members related to sources of information about work and benefits.

Justification #3: During semi-structured interviews with beneficiaries in 2015, respondents underscored the difficulty involved in the process of navigating SSA benefits. Knowledge of where beneficiaries go when they want disability-related information might help SSA better target its information dissemination efforts intended to facilitate work.

- **Change #4:** We added new survey items in Section I related to health and functioning. We will administer these items to all sample members. Specific additions include new questions on episodic periods of poor health; bed days; access to informal support; and availability of transportation.

Justification #4: The TSG suggested we enhance the questions in Section I to learn more about beneficiaries' health. Given that poor health comes up frequently as the reason that beneficiaries are unable to work or earn more, we added these items to elicit more detailed information about beneficiaries' health and functioning.

- **Change #5:** We added new survey items for all sample members related to income in Section K, including questions about perceived financial situation and income or gifts from others.

Justification #5: Collecting information about beneficiary income is important for several reasons. It is an outcome of interest to SSA because of its relationship to employment and its importance in achieving self-sufficiency. We added questions on how respondents perceive their financial situation because such perceptions might affect work-related behavior and might vary across beneficiaries with different characteristics and different levels of employment success.

- **Change #6:** We added a new survey item in Section L for all sample members related to veteran status.

Justification #6: We added this item because there is a strong interest in veterans with disabilities and limited knowledge about SSDI and SSI beneficiaries who are veterans.

- **Change #8:** We added questions to screen for benefit suspense, which we will administer to all survey respondents who are currently working, have worked during the past 6 months, or during the previous calendar year.

Justification #8: Adding a question module to solicit information about suspense-related experiences will provide useful information about benefit suspensions unavailable from any other source.

- **Change #9:** We added questions applicable to sample members reporting a recent suspense. We added three sets of survey items, which we will administer to respondents' based on their self-reported suspense status. These three sets of items include questions applicable to all self-identified suspense respondents, questions applicable to self-identified suspense respondents in suspense at interview, and questions applicable to self-identified suspense respondents receiving benefits at interview.

Justification #9: The addition of these questions allows us to fulfill one of the NBS's primary goals: to compile detailed information on the experience of beneficiaries who work and earn enough to potentially leave cash benefits.

- **Change #10:** We deleted questions about people with whom respondents discuss work goals and the extent to which that individual believes the respondents' goals should include work, learning new job skills, or advancing in a job (Section B).

Justification #10: We deleted these items because we believe the questions yield data of

limited analytic value. In addition, deletion of this item allows us to add the new survey items related to benefit suspense without significantly increasing the burden on respondents.

- **Change #11:** We modified the reference period for questions about jobs and services from 2014 to 2016.

Justification #11: We changed the reference period to reflect the time frame of interest for the next wave of the survey.

- **Change #12:** We changed question wording to reflect changes in SSA policies (for example, the trial work and SGA amounts).

Justification #12: We updated amounts in question and probe text to accurately reflect SSA's policies.

- **Change #13:** We made minor changes to question wording and response categories to improve respondent comprehension (for example, revising the wording of B47 from "Please tell me how much you agree with the following statements" to "Please tell me how much you agree or disagree with the following statements" to more readily inform the respondent that the question is eliciting an affirmative or negative response).

Justification #13: The modifications to existing items add clarity to the survey and improve data quality. We tested these modifications during a pretest to confirm they improved respondents' comprehension.

- **Change #14:** We modified questions about services received and service providers in Section G by: removing questions about service intensity (G37 through G39 for each provider); focusing only on services received during the previous calendar year (versus services ever received); and asking collectively what types of services were received from providers using a check-all-that-apply item rather than enumerating specific providers and asking respondents whether they used each service.

Justification #14: The modifications help streamline Section G. We have not used the deleted items extensively for analysis in the past. Deleting these items allows us to add the new survey items noted above without significantly increasing the burden for respondents.

- **Change #15:** We are revising the Privacy Act Statement on this form.

Justification #15: SSA's Office of the General Counsel is conducting a systematic review of SSA's Privacy Act Statements on agency forms. As a result, SSA is updating the Privacy Act Statement on the form.

We will administer the instrument by telephone with in-person follow-up, as needed. The next round of data collection will begin in early 2017 and continue for approximately eight months. To promote response among Hispanic sample members, we will translate the survey into

Spanish. We will employ a number of additional accommodations for those with hearing or speech impairments including teletypewriter (TTY), Telecommunications Relay Service (TRS), amplifiers, and instant messaging. We scheduled the data collection to last approximately eight months.

Upon receiving approval for the changes outlined above, we will discontinue use of the prior instrument. The attached instrument will replace the earlier instrument for all data collection efforts moving forward.