

BENEFICIARY INTERVIEW MATERIALS

The process study team will interview a total of 144 beneficiaries (9 in each state across all eight demonstration sites, per round) in the second and third rounds of data collection to gather information about their experiences participating in POD. We will include beneficiaries from both treatment groups and from key subgroups of interest (for example, beneficiaries who requested to withdraw; low earning offset users; high earning offset users; or control group members). We organized the topic areas for the beneficiary interviews by evaluation focus area, and provide a list of topics we will cover during the semi-structured telephone interviews. We summarize the topics in Table D.1. Before each round of data collection, the task leader will create semi-structured interview guides from the interview topics relevant to the POD study subjects' group assignment and the site visit round.

At the start of the interview, the Mathematica interviewer will explain Mathematica's role evaluating the POD demonstration; the purpose of the interview; and that the individual will receive a \$25 non-cash incentive for participating in the call. The interviewer will also convey that participation in the interview is voluntary and that the individual's decision to participate or not participate will have no effect on SSDI benefits or participation in the POD demonstration. The interviewer will also emphasize that the beneficiary can stop the interview at any time without being penalized or disadvantaged in any way. We provide the script interviewers will use at the start of the interview below in Appendix D.1.

## APPENDIX D.1

### INTRODUCTION FOR BENEFICIARY INTERVIEWS: ROUNDS 2-3

Hi, my name is \_\_\_\_\_, and I work for a company called Mathematica Policy Research.

I am contacting you today because we are doing a study of the Promoting Opportunity Demonstration, known as POD, for the Social Security Administration (SSA). My understanding is that you signed up to participate in POD in YYYY. We are calling beneficiaries like you to learn more about your experiences with POD.

What we learn from you today will help SSA do a better job of serving individuals with disabilities through its Social Security Disability Insurance (SSDI) benefit program in the future.

I expect that our discussion will last about 45 minutes.

Your participation in this call is voluntary. Whether or not you participate will have no effect on your SSDI benefits or your participation in POD. You can stop the interview at any time and you will not be penalized in any way. You also do not have to answer any question you don't feel comfortable answering. If you like, we can also break our discussion into two parts, and schedule a second appointment to finish the discussion at a later time. You will be sent a \$25 gift card for completing the discussion.

Our discussion today will be audio recorded to ensure that our meeting notes are accurate. Only members of our team will listen to the recording and we will destroy it at the end of the study. This is also a good time to emphasize that all information you share with us will remain confidential to the fullest extent possible by law, meaning that your information will be kept as private as possible. We may need to notify someone if keeping that information confidential could harm you or someone else. None of our reports will include any information that identifies you. Your responses today will be combined with the responses collected from about 140 other beneficiaries who participate in POD. Your responses will only be used for the purpose of this study and will not impact your DI benefits or your participation in the POD study in any way.

I also want to let you know that I am not an expert on Social Security disability, Medicare, or Medicaid. So I cannot answer questions or give advice about SSDI benefits or your personal circumstances.

Are you available and willing to participate in this discussion?

If "Yes," do you have any questions before we begin?

If "No," Okay, let's get started.

## APPENDIX D.2

### INTERVIEW TOPICS FOR BENEFICIARY INTERVIEWS: ROUNDS 2-3

Table D.1. Beneficiary interview topics addressing each research question, by evaluation focus

Interview Topics	
<b>I. Respondent background and experience</b>	
General background information	Duration of SSDI benefit receipt, any SSI benefit receipt, any dependent auxiliary beneficiaries Summary of employment history, previous SSDI benefit suspension for work Participation in previous demonstrations (SSA or otherwise) Approximate date of enrollment in POD and whether or not the beneficiary disenrolled
<b>II. Program Environment<sup>a</sup>—community context and the counterfactual</b>	
<b>B. Service environment</b>	
How do the general employment environment and other state features affect benefit offset use?	The role of the general employment environment in beneficiary employment decisions
How prevalent is engagement in the Ticket to Work (TTW) Program and VR?	Engagement with VR or TTW before POD Referral source for VR or TTW services
How did state VR agencies and other TTW providers previously serve beneficiaries before POD, and did this change during the demonstration period?	Engagement with VR or Ticket to Work after enrollment in POD and referral source The role of POD in the decision to seek services Beneficiaries' perspectives on the accessibility and timeliness of services and success in achieving employment goals Beneficiaries' perspectives on unmet service needs
<b>III. POD Recruitment, enrollment, and RA</b>	
<b>A. Outreach and recruitment</b>	
What types of information did DI beneficiaries receive about POD?	Initial exposure to POD outreach efforts and initial impressions Information received about POD through VR, SSA field offices, local WIPA providers, and other entities
How successful were outreach efforts in helping beneficiaries understand POD?	Ability to have questions answered during recruitment Initial points of confusion about POD and if/how these points were clarified Comparison of initial impressions to later experience in POD POD participants' understanding of POD offset rules
How did outreach and enrollment differ for concurrent beneficiaries (those who receive SSI and DI)?	The role of SSI receipt in the decision to participate in POD The role of SSI receipt in POD enrollment

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**Interview Topics**

**B. Enrollment**

What were beneficiaries' experiences with enrollment?	Ability to have questions answered during enrollment Experience with POD enrollment process Understanding of random assignment group
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**VI. Operations and fidelity to the program design**

Is the integrity of random assignment being maintained?	Beneficiary exposure to information about POD treatment or control groups other than the group to which the beneficiary was assigned The effect of information on other POD treatment or control groups on beneficiaries' understanding of their POD group or attitudes towards POD
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**VII. POD service delivery**

Has the implementation contractor clearly defined and correctly provided the intervention?	Beneficiaries' description of POD in their own words Beneficiary understanding of when and for how long benefits are effected by employment for beneficiaries in their assigned treatment or control group Beneficiaries' comfort level with their current understanding of POD Beneficiary sources of information on POD Beneficiaries' ability to have questions about POD answered How and which service providers have helped participants to understand relevant SSA notices and file reconsiderations/appeals/waivers of overpayments
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What are beneficiaries' experiences with POD counselors?	The frequency and nature of beneficiary contact with POD counselors Role of counselors in explaining POD and setting and helping to achieve employment goals Changes in beneficiaries' work goals changed since enrolling in POD
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How do state VR agencies collect earnings and IRWE information from individuals assigned to a treatment group?	Beneficiaries' experiences reporting earnings and IRWE information
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How timely are benefit adjustments?	Beneficiary experiences with the timeliness of benefit adjustment The impact of delays in benefit adjustment
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How prevalent are improper payments?	Beneficiary experiences with overpayments or underpayments while in POD Beneficiary understanding of the cause of past improper payments The impact of improper payments on beneficiaries' employment and attitudes towards POD
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Interview Topics	
Are monthly earnings and IRWEs reported on time?	The frequency and methods beneficiaries use to report earnings and IRWEs Beneficiary receipt of assistance in reporting earnings and IRWEs Effect of outreach efforts or reminders on monthly earnings reporting
<b>VIII. Administration, coordination, and inter-agency relationships</b>	
How do the organizations implementing POD communicate and coordinate with one another?	Beneficiary experience interacting with multiple organizations implementing POD or delivering disability-related services and cross-agency communication
<b>POD participation patterns and experience</b>	
Do beneficiaries favorably perceive the interventions?	Beneficiary highlights of POD and perceived shortcomings of POD The effect of POD on beneficiaries' quality of life Attitudes about employment and the evolution of employment attitudes over the course of the demonstration
What are most prevalent reasons for volunteering or not volunteering?	Beneficiaries' motivations to participate in POD Beneficiaries' hesitations in participating in POD and if/how they were overcome
What are the events causing POD withdrawals, if applicable?	Beneficiary awareness of the option to revert to current law The timing of disenrollment from POD
What are the participants' reasons for withdrawing?	Factors affecting beneficiary decisions to remain in POD and revert to current law
<b>IX. Successes and challenges</b>	
What aspects of recruitment and enrollment were successful? Less successful?	Factors that contributed to enrollment in POD Obstacles that deterred from POD enrollment
What facilitated timely earnings and IRWE reporting?	Facilitators of timely earnings and IRWE reporting Ability to replicate facilitators in other sites
What are the obstacles preventing timely earnings and IRWE reporting?	Obstacles preventing timely earnings and IRWE reporting How obstacles were addressed Success in addressing obstacles
What facilitated benefit offset use?	Facilitators of employment and benefit offset use
What are the obstacles preventing benefit offset use, if any?	Obstacles preventing substantial employment and benefit offset use How obstacles were addressed Success in addressing obstacles

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**Interview Topics**

**X. Outcomes and lessons learned**

How does POD change the participant's use of other government programs or income supports?	Increase or decrease in POD participant use of other government programs or income supports Which programs/supports, and how participant use changed Unexpected consequences of participating in POD Factors that contributed to these consequences
What lessons learned can be shared with other sites gearing up to implement a similar program?	Beneficiary suggestions for improvement

<sup>a</sup>Some of this information will be gathered prior to the site visit.