

**Justification for Non-Substantive Changes for  
SSA Beyond Benefits Study (BBS) Data Collection  
OMB No. 0960-0836**

**Background**

The objective of the Beyond Benefits Study (BBS) is to understand the needs (e.g., service, medical and employment) of individuals who, due to medical improvement, have “exited” (known as Exiters) or are likely to “exit” (known as Possible Exiters) the Social Security Disability Insurance (SSDI) program, the Supplemental Security Income (SSI) program, or both. The BBS employs a mixed-methods approach comprising qualitative data collection with Exiters and Possible Exiters through key informant interviews (N=70) and focus groups (N=120-140), quantitative data collection through a national survey with a representative sample of Exiters and Possible Exiters (N=4,000), a Motivational Interviewing (MI) pilot test with Exiters (N=50), focus groups with service providers (N=20), and in-depth interviews with state and agency leadership (N=30).

**Summary of Revisions**

Due to challenges in recruiting Exiter and potential Exiter focus group participants, primarily caused by the technical requirements of virtual meeting platform (MS Teams) leading to no-shows, we are currently 27 participants short of our target for the focus groups. We have found that participants are more willing and able to engage in key informant interviews, which can be conducted by telephone, rather than in focus groups. As a result, we plan to conduct key informant interviews with the remaining 27 participants. This adjustment will bring our total number of key informant interviews to 97 and reduce our focus group total to 118 participants. Both the interview and focus group protocols, approved by SSA and OMB, address the same substantive topics.

Our proposed change aims to optimize resources by offering a telephone interview to focus group participants who were scheduled but did not attend, as this format may be more accessible to them than the virtual platform. If additional participants are needed, we will also reach out to non-respondents from the full focus group sample. To ensure no overlap, only individuals who have not yet participated will receive an invitation, and no participant will be asked to take part in more than one data collection activity. Invitations for the phone interviews will be sent through a new mailing.

**Revisions to the Information Collection**

Westat is changing the data collection method for the remaining 27 participants needed for the first qualitative task for BBS from focus groups to key informant interviews. Our proposed change and justification follows:

- **Change #1:** We will convert the remaining 27 focus group participants into 27 key informant interviews.

- **Justification #1:** Focus group participation requires access to and familiarity with Microsoft Teams, and despite our best efforts to provide instructions, tutorials, and technical support, many participants continue to face challenges with the platform. This change will allow participants to contribute their input using a format they are more comfortable with, while also helping us use our resources more effectively. By offering telephone interviews, we can better accommodate participants' schedules and availability, removing barriers to participation. Additionally, interviewing individuals who were previously unable or unwilling to join via the virtual platform will provide valuable insights into the challenges they faced, enriching our understanding of barriers to focus group participation and offering lessons for future studies.

The key informant interview protocol closely aligns with the focus group protocol, with the only difference being data collection at an individual level rather than the group level.

We will implement these revisions upon approval. These changes will not increase the burden of data collection; in fact, they may help reduce the overall burden for participants because they will not have to learn how to use and communicate via Microsoft Teams.