

New Beneficiary Data System

Introduction

The New Beneficiary Data System (NBDS), developed over the past decade by the Social Security Administration (SSA), contains extensive information on the changing circumstances of aged and disabled beneficiaries. The NBDS is a compilation of data merged from the New Beneficiary Survey (NBS) conducted in late 1982, information from administrative records, and the New Beneficiary Followup (NBF) conducted in 1991.

Description

The original NBS was based upon a national cross-sectional survey sample of 18,599, representing nearly 2 million individuals who had begun receiving Social Security benefits during a 12-month period in 1980-81.

Three types of individuals were interviewed:

- retired workers,
- disabled workers, and
- wife or widow beneficiaries.

The NBS also contains interviews from persons aged 65 or older who were covered by Medicare but were not receiving Social Security payments due to high earnings. Ten years later, the NBF was designed with an emphasis on measuring changes over time. Throughout 1991, followup interviews were conducted with surviving respondents from the NBS. A total of 12,128 followup interviews were completed, representing a response rate of 87.5 percent.

Variables

The original NBS measured a number of variables:

- demographic characteristics;
- employment, marital, and childbearing histories;
- household composition;
- health;
- income and assets;
- program knowledge; and
- information about the spouses of married respondents.

The NBF updates marital status, household composition, and economic profiles. In addition, the followup contains sections on family contacts, post-retirement employment, effects of widowhood and divorce, major reasons for changes in economic status, a more extensive section on health, and information on household moves and reasons for moving.

Unique Features

The NBDS contains unique measurements that make it valuable not only for studies about Social Security, but also for studies of health, economic, labor, gerontological, and

welfare issues. No other data set has such detailed baseline survey data of a population immediately after retirement or disability enhanced with subsequent measures over an extended period of time.

The NBDS contains objective measures from administrative files of yearly covered earnings from 1951 to 1992, Medicare expenditures from 1984 to 1992, and dates of death as of spring 1992. The NBDS also identifies whether a Supplemental Security Income application was ever made and subsequent payment status at four points in time.

For studies of health, the Medicare expenditure variables include inpatient costs, outpatient hospital costs, home health care costs, and physicians' charges. The survey data cover functional capacity including activities for daily living and instrumental activities for daily living. For studies of work in retirement, the survey includes yearly information on extent of work, characteristics of the current or last job, and reasons for working or not working.

Publications

SSA analyzed the original NBS data set in a series of 23 studies. These studies were subsequently published in compilation form as *SSA's 1982 New Beneficiary Study*. Interested parties may contact the Division of Information Resources at (202) 358-6274 to obtain a copy. In addition, the studies were summarized in the *Social Security Bulletin*, Vol. 55, No. 2 (1992), pp. 20-35. Since the 1991 NBF, several additional studies have appeared in the Bulletin. These include: John C. Hennessey and L. Scott Muller, "The Effect of Vocational Rehabilitation and Work Incentives on Helping the Disabled-Worker Beneficiary Back to Work," Vol. 58, No. 1 (1995), pp. 15-28; John C. Hennessey, "Job Patterns of Disabled Beneficiaries," Vol. 59, No. 4 (1996), pp. 3-11; and Evan S. Schechter, "Industry, Occupation, and Disability Insurance Beneficiary Work Return," Vol. 62, No. 1 (1999), pp. 10-22.

Access to Data Set

The 1982 NBS and the 1991 NBF may be accessed on the Internet at <www.ssa.gov/policy/research/NBDS/index.html>; the National Archives in Washington, DC; or through the Inter-university Consortium for Political and Social Research (ICPSR) at the University of Michigan Data Archive of Computerized Data on Aging. The internet address for the ICPSR is <www.icpsr.umich.edu>, and the data set is available in the archive of the site.

*by Howard Iams
Division of Policy Evaluation,
Office of Research, Evaluation, and Statistics,
Office of Policy, Social Security Administration*