

Longitudinal Employment Outcomes for Social Security Disability Beneficiaries with Work Goals and Expectations

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Purpose of Study

- **To examine Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) beneficiaries with work goals and expectations**
 - Number
 - Characteristics
 - Work-related activities
- **Conducted for the Social Security Administration (SSA) as part of a broader evaluation of Ticket to Work (TTW)**

Motivation for Study

- **In previous studies, we found that a large share of SSI and SSDI beneficiaries had work goals and expectations**
- **SSA wanted to know if those who said they wanted to work were actually pursuing employment**



Data

- **2004 National Beneficiary Survey (NBS)**
 - Nationally representative sample of 7,603 working-age SSI and SSDI beneficiaries
- **NBS matched to SSA administrative data**
 - 2007 Ticket Research File, which contains extracts from numerous SSA administrative files
- **SSA staff matched the NBS to annual IRS earnings data for 2004–2007**



Methods

- **Used the NBS to identify beneficiaries with work goals or expectations**
 - Goals include getting a job, moving up in a job, or learning new job skills
 - Sees self working for pay in the next year or the next five years
 - Those indicating at least one of the above were categorized as “work-oriented”
- **Used NBS, SSA, and IRS data to examine characteristics, service use, and employment outcomes during 2004–2007**



Questions Addressed

- **How many beneficiaries reported having work goals or expectations?**
- **How successful were they at finding employment?**

How Many Beneficiaries Are Work-Oriented?

- **40 percent of all beneficiaries (about 4.4 million individuals) are work-oriented**
 - **35 percent of SSDI-only beneficiaries**
 - **45 percent of SSI beneficiaries**

How Successful Were Work-Oriented Beneficiaries?

- **Success indicators**
 - Recent work-related activities at interview in 2004
 - Earnings during the year of interview and three subsequent years (2004–2007)
 - Exit from the disability rolls due to work during 2004–2007



Recent Work-Related Activities at Interview

	Not Work-Oriented		Work-Oriented		
	All	All	SSDI Only	Concurrent	SSI Only
Recent employment, service use, or training	4%	24%	22%	27%	24%
Working	1%	21%	25%	22%	15%
Looking for work	1%	13%	10%	17%	16%
Worked in the previous year	2%	29%	33%	33%	22%
Any of the above	6%	52%	51%	56%	50%

Source: 2004 NBS.

Four-Year Employment (2004–2007)

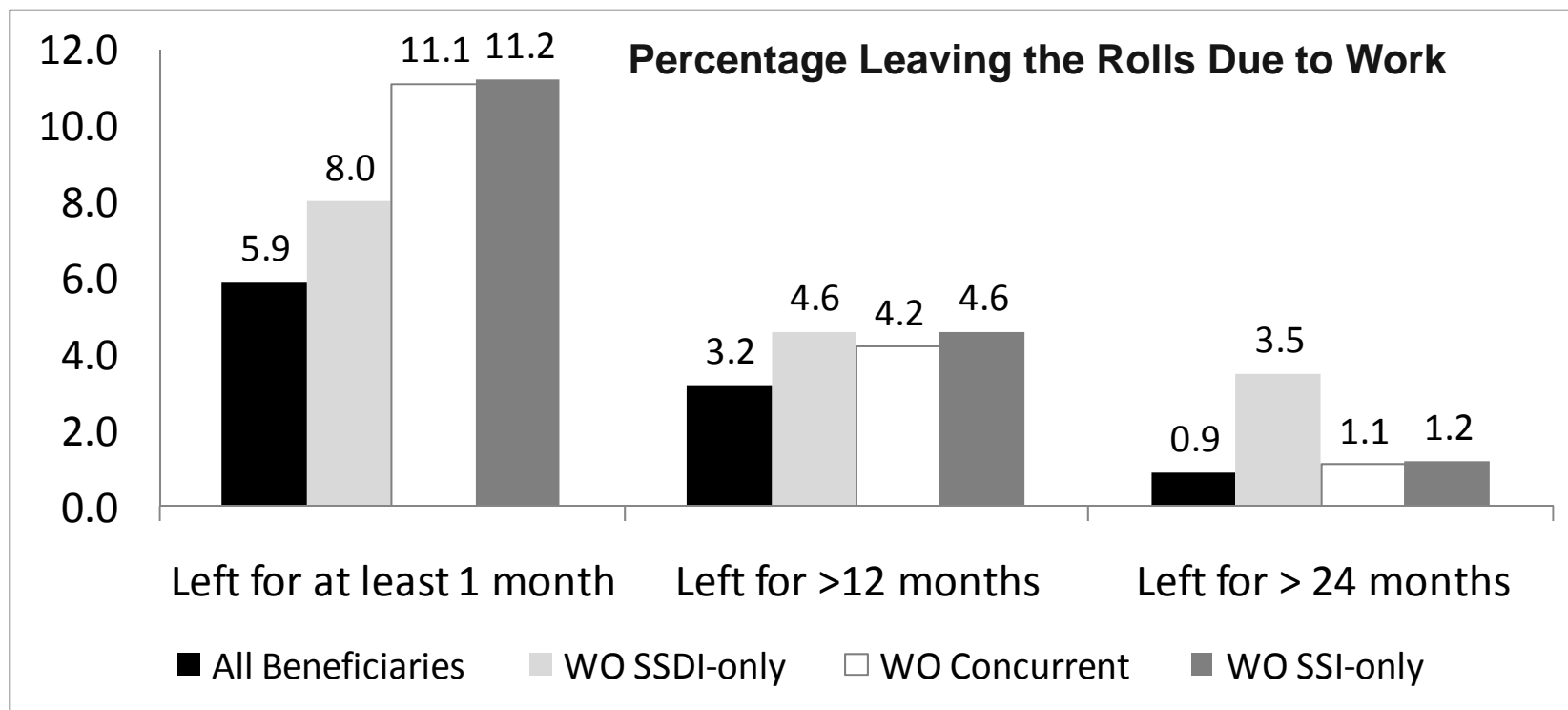
	Not Work-Oriented		Work-Oriented		
	All	All	SSDI Only	Concurrent	SSI Only
Earnings in at least one year (2004–2007)	15%	45%	49%	51%	37%
Average earnings	\$5,121	\$7,091	\$8,605	\$4,781	\$6,087
Earnings in all four years	5%	21%	24%	23%	15%

Source: 2004 NBS matched to annual IRS earnings data.

Notes: Earnings expressed in 2007 dollars and computed as the mean of individual averages across all years with earnings among beneficiaries with earnings in any year.



Left the Disability Rolls Due to Work During 2004–2007



Source: 2004 NBS matched to 2007 Ticket Research File.

Note: “Leaving the rolls after finding work” is defined as having monthly cash benefits suspended or terminated due to earnings.



Factors Affecting Success

- **Many work-oriented beneficiaries (45 percent) found jobs, but far fewer (21 percent) maintained them over the long term**
 - **Findings from a study of TTW participants indicate that changes in health status play an important role**
 - **Those who achieved significant employment success were much less likely to report being in poor health in each of three years interviewed**
 - **Those experiencing negative changes in health were less likely to remain enrolled in TTW**

Conclusions

- **Many beneficiaries (40 percent) report having work goals and expectations**
 - Half were actively pursuing work at interview
 - Just under half had earnings during 2004–2007
- **There are significant differences between SSDI and SSI beneficiaries**

Conclusions (cont'd.)

- **When viewed over a long period, more beneficiaries with work goals/expectations are either working or pursuing work than cross-sectional statistics indicate**

References

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