Using the UAS Comprehensive File to Evaluate Social Security Program Knowledge and Communication Preferences

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Overview

- The 3 UAS Social Security Surveys (and additional UAS Core Surveys)
  - Retirement Program Knowledge survey
  - Disability Program Knowledge survey
  - Communications Channels Preferences survey
- The UAS Comprehensive File
- What is Comp15?
- How does Comp 15 work?
- Why SAS?
- Peek at the results

Social Security Retirement Program Knowledge

The **Social Security Retirement Program Knowledge** survey asks about the public's knowledge about various SSA programs and services, including:

- Social Security Program Knowledge (T/F)
- Self-Assessed Social Security Program Knowledge
- General Perceptions about Social Security Retirement
- Retirement Planning and Expectations
- Self-Assessed Retirement Preparedness
- Experience with and Expectations of Social Security Programs
- Social Security Claiming Terminology
- Use and Familiarity with the Internet

Social Security Disability Program Knowledge

The **Social Security Disability Program Knowledge** survey asks about the public's knowledge, opinions and experiences with the Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) programs, including:

- General knowledge about work-limiting health conditions and disability
- Knowledge about Social Security Disability Benefits (SSDI and SSI)
- Common causes of disability among program beneficiaries
- Percentage of adults receiving retirement, SNAP, and disability benefits
- Percentage of adult applicants ultimately approved for disability benefits
- Experience with program application

Communications Channels Preferences

The **Communications Channels Preferences** survey asks about Social Security customers' communication preferences, including:

- SSA website visits
- Retirement planning sources: usefulness, accuracy, ease of access, understandability
- Social Security benefit information: useful, trust, follow-up actions
- *my* Social Security account usage, accuracy, confidence
- Retirement Estimator: heard about, usage, accuracy
- *Social Security Statement*: usefulness, understandability
- Service delivery and communication preferences
- Method for filing for benefits (web, office, phone, etc.)

Additional UAS Core Surveys

In addition to the 3 SSA surveys, the Comprehensive File includes data from 8 other surveys that comprise numerous topics, including:

- Life Satisfaction
- Personality
- Cognitive measure
- HRS (Health and Retirement Study)
- Financial Services and Decision Making

UAS Comprehensive file – One Stop Data

- Combines multi-wave data from key Understanding America Study (UAS) surveys into one dataset
- Includes all 3 Social Security surveys (Retirement Program Knowledge, Disability Program Knowledge, and Channels Preferences) and additional core UAS surveys
- Released quarterly, as Stata and .csv files
- Provides binary variables for many survey questions
- Huge number of variables
- UAS version of the RAND Health and Retirement Survey – easier for users

SSA developed Comp15 to use the Comp File

- Goal: to make it much easier and faster for SSA researchers to use the UAS comprehensive file, especially the Social Security surveys
- Comp15 is a common code base, common datasets, and foundational tables that can jump start research papers, web content, statistics, and ad hoc analyses of UAS data.
- Uses the December 2023 comprehensive file (up to wave 15)
- Makes updating to new waves happen almost automatic
- All built with SAS code and datasets

SAS: Reuse existing table code

- Legacy: SSA has a substantial investment in SAS and a lot of legacy code and data, including an analytics platform built on SAS.
- Reuses SAS code from an analysis system of SSA's microsimulation projection model.
- Easier mass-production of tables, especially by reusing code across questions with the same answer structures (true/false and yes/no, Likert scale, etc.)
- Automatic disclosure proofing by eliminating low sample subgroups.
- Using SAS arrays (variable13, variable14, variable15) makes it much easier to do longitudinal analyses by iterating through the waves.

Comp 15 works in 3 steps

1. Transform: Create SAS datasets for each Social Security survey with more descriptive variable names.
2. Analysis: Create binary variables for every selection for every question. The variable names for questions that have the same responses are structured the same way to standardize table code.
3. Tables: We produce two tables for each of Channel's 133 questions:
    1. the question's results
    2. the demographics of who answered it (key to understanding the results)

Example of Comp 15 Process

- Question Ch11: Have you ever sought information about your Social Security RETIREMENT benefits from the following sources? Please select all that apply.
- Wave 14 variables for the 'Social Security Administration' selection:
  - In survey dataset: ch011_intros4 (UAS238 is wave 14)
  - In comprehensive file: i14ch011_intros4
  - In Comp15 as a SAS variable: i_ch11s4_askrib_SSA_14
- Moving the wave number to the end allows us to create a SAS array by wave, which will make longitudinal analyses easier.
- We use a 'current response' variable with the most recent response across waves to maximize sample size:
  - Adds the suffix _cr rather than a wave number: i_ch11s4_askrib_SSA_cr

Ch11 Results: “Have you ever sought information about your Social Security RETIREMENT benefits from the following sources? Please select all that apply.”

Percent who chose:

	Family, Friends	Work	Media	SSA	Other Govt	Finance Industry	Non-Profits	Local Orgs	None
Total	28%	20%	5%	44%	3%	9%	5%	2%	40%
Age									
18-29	22%	16%	5%	10%	3%	3%	1%	1%	65%
30-39	24%	18%	4%	22%	3%	5%	1%	2%	56%
40-49	26%	18%	4%	33%	3%	6%	2%	1%	48%
50-59	30%	19%	6%	52%	3%	9%	5%	2%	34%
60-69	37%	20%	6%	76%	3%	15%	10%	2%	16%
70+	31%	28%	6%	82%	3%	18%	12%	3%	12%

Questions?