



MRDRC Newsletter | Summer 2022 | 22(3)

### Director’s corner



*John Laitner*

The Health and Retirement Study (HRS), which is principally funded by National Institute on Aging, is, it seems fair to say, the premier data set for studying retirement and well-being post retirement in the United States. The HRS has been collecting data on cohorts 51 to 61 years old since 1992. Each cohort is followed at two-year intervals, indefinitely. The survey specializes in collecting lifetime demographic information, health status, and household wealth, including DC and DB pensions. It collects current job

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## Recent MRDRC data projects extend research possibilities

Historically MRRC/MRDRC researchers have helped to develop some of the most-used subject-area surveys, including the Health and Retirement Study (HRS). While such data development projects certainly assist their initiators, they also often improve the surveys for other investigators.

Many of the MRDRC’s researchers have expertise in data development, and the center held two related 2020 workshops, “[Building Data Resources for Studying Effects of Occupational Characteristics on Health, Disability, and Retirement](#)” and “[Disability Research with the Health and Retirement Study](#).” The workshops explored the HRS’ limitations and possible enhancements that could increase the data set’s

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information and, with permission, it links to respondents' lifetime Social Security annual earnings records. Over time, links to other administrative data (such as Medicare and Medicaid) have become available and new cohorts are periodically added (the current total being eight).

The MRDRC (formerly MRRC) has, since its inception, used the HRS as a mainstay of its research program, sought to inform the scientific community at large of the great richness and scope of the HRS data, and attempted to help improve the HRS as a research tool. The MRDRC has included HRS principal investigators (PI) and co-PIs among its researchers, has encouraged projects based upon HRS experimental modules, provided feedback to the HRS

(which is collected at the Institute for Social Research, where the MRDRC is housed), and supported the construction of the RAND HRS files, which seek to facilitate research by simplifying data access.

This newsletter highlights several of our recent projects related to raising the HRS' value for researchers. UM22-Q1 provides a crosswalk linking O\*NET occupational data to the HRS (and other data sets); UM21-Q5 constructs poverty measures for HRS households consistent with federally established standards; UM21-Q3 constructs RAND HRS variables on respondent SSDI and SSI status; and, UM18-Q3 adds IRA withdrawal variables to the RAND HRS files. Each of these projects seeks to enhance the HRS' scientific value and represents an investment in research infrastructure for the future. 

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usefulness. Each workshop has stimulated (so far) a data development project that eventually will expand research possibilities for all.

The first workshop inspired Susann Rohwedder's (RAND) fiscal year 2021 project, "[Adding New Variables to the RAND HRS Longitudinal File to Better Support Research on Disability](#)" (UM21-Q3). Based on suggestions made at the workshop, Rohwedder added variables to the RAND HRS data

set measuring the change in Supplemental Security Insurance (SSI) and Social Security Disability Insurance (SSDI) application status since the last interview. The new variables indicate whether a respondent has applied, been denied, appealed, started to receive, or stopped receiving SSI or SSDI benefits since the last wave. The variables and documentation are expected to be available this July [on the HRS website](#).

The second workshop on occupational data led

to **“Creating a Public Resource: O\*NET Job Characteristics Data Set for Use with the Health and Retirement Study and Other Surveys”**


(UM21-Q1), headed by Brooke Helppie-McFall (University of Michigan/U-M), Dawn Carr (Florida State University), and assisted by Amanda Sonnega (U-M). While the HRS has a wealth of longitudinal data on individual respondents’ work lives and retirement choices, it can’t place that data in the context of population-level work experiences, making it difficult to study, for example, workplace disparities experienced by under-represented groups. The U.S. Department of Labor’s Employment and Training Administration’s Occupational Information Network (O\*NET) database, on the other hand, offers occupational measures based on worker surveys and expert assessments that can be seen as population averages of a job’s occupational characteristics.

Previous research projects (including two by Helppie-McFall and Sonnega) created crosswalks between O\*NET and the HRS, but each team made different linkage decisions before proceeding with their analysis. This makes comparisons of results between and reproducibility of studies difficult. Based on conversations with workshop attendees from academia and government, Helppie-McFall, Carr, and Sonnega are building a standardized, high-quality link between the two data sources. When completed, this fiscal year 2022 project’s crosswalk will be publicly available, providing all researchers

with a ready-made framework for their studies.

In addition to the above, two other MRDRC projects have enhanced the HRS’ usability. The fiscal year 2018 project, **“Addition to the RAND HRS Longitudinal Files: IRA Withdrawals in the HRS, 2000 to 2016”** (UM18-Q3), created new variables capturing respondents’ IRA withdrawals. The work of Michael D. Hurd, Erik Meijer, Philip Pantoja, and Rohwedder (all RAND), the project facilitates research on older adults’ economic well-being and the effects of tax-advantaged retirement accounts.

Longitudinal studies on economic well-being will also benefit from Rohwedder’s in-progress fiscal year 2021 project, **“Extending RAND HRS Poverty Measures to Earlier HRS Waves”** (UM21-Q5). Currently, the RAND HRS has poverty measures for 2002 forward. Until 2002, the HRS hadn’t reached its “steady-state,” which makes applying those measures to earlier years tricky due to cross-wave differences in survey questions. With this project, Rohwedder aims to develop variables for HRS waves from 1992 to 2000 (excepting 1994) that maintain longitudinal consistency with those for 2002 onward.


Data projects such as these are vital to improving the research ecosystem. The MRDRC appreciates the researchers who take on these often complicated projects and SSA’s continued funding of them. 

# News from MRDRC researchers

## Journal publications

In May 2021, the Journal of Pension Economics and Finance published Anya Samek, Arie Kapteyn, and Andre Gray's article, "[Using vignettes to improve understanding of Social Security and annuities.](#)" The piece acknowledges funding for Samek and Kapteyn's 2018 project, "[Using Consequence Messaging to Improve Understanding of Social Security](#)" (UM18-09).

In June 2021, Olivia S. Mitchell and Stephen P. Utkus published "[Target-date funds and portfolio choice in 401\(k\) plans](#)" in the Journal of Pension Economics and Finance. That article cites funding for Mitchell's 2013 project, "[Evaluating Web-based Savings Interventions: A Preliminary Assessment](#)" (UM13-10).

And Journal of Pension Economics and Finance for the hat trick: David Knapp and Jinkook Lee's introduction to the journal's November 2021 special issue special issue, "[Institutional Influences on Retirement, Health, and Well-being.](#)" notes that many of the issue's papers were first presented at the Gateway to Global Aging and MRDRC's [2019 workshop](#) of the same name. 

*Researchers are encouraged to share academic publications, media coverage, and conference presentations of their MRRC/MRDRC-funded work. Please send announcements to [mrdrcumich@umich.edu](mailto:mrdrcumich@umich.edu).*



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## Keep in touch

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