
Appendix B: OASDI Benefit Award Data

OASDI benefit award data in the *Annual Statistical Supplement* are derived mainly from two sources:

- **100 percent award data:** The Master Beneficiary Record (MBR) is the major administrative data base for the Social Security program. It is used for the calculation of benefits and the maintenance of information about beneficiaries. Each month, when the MBR is updated, a record of award actions is created. This record is used to prepare award data on a 100 percent basis. Data available each month include types of benefits awarded, sex of beneficiary, and the monthly benefit amounts payable. These data are used to update the time-series tables.
- **Award data from the OASDI 1 percent sample:** This source provides monthly award data based on a 1 percent sample derived from the MBR. The 12 monthly files are combined to produce an annual file. The 1 percent sample is used to prepare award tables, which show detailed data by age, sex, and type of benefit and distributions by benefit amount. Award data from the 1 percent sample are similar to the data described above. An important difference, however, is the treatment of dual entitlement.

When a retired-worker beneficiary subsequently becomes dually entitled to a secondary benefit as a wife, husband, or widow or widower, the secondary benefit is counted as an award in the 100 percent data. In contrast, award data that are based on the Old-Age, Survivors, and Disability Insurance (OASDI) 1 percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

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