

TECHNICAL NOTE

Estimates of coverage, contributions, and benefits are based for the most part on reports by private insurance companies and other non-government agencies. Many of the reports include data for persons who are no longer currently employed as wage and salary workers because of retirement, temporary layoff, sickness, or shift in jobs. No attempt has been made to adjust the data for any overstatement that might result from their inclusion. The coverage estimates for pension plans, which have been adjusted to eliminate annuitants, provide the one exception.

Contributions under insured pension plans are on a net basis, with dividends and refunds deducted. Those under noninsured plans are, for the most part, on a gross basis, and refunds appear as benefit payments. For pay-as-you-go (unfunded) plans, contributions have been assumed to equal benefit payments. Estimates of per capita contributions are derived by dividing total annual

contributions by the average number of employees covered during the year.

The number of beneficiaries under pension plans relates to those receiving periodic payments at the end of the year and thus excludes those who received lump sums during the year. The retirement benefits under noninsured plans do include (1) refunds of employee contributions to individuals who withdraw from the plans before retirement and before accumulating vested deferred rights, (2) payments of the excess of employee contributions to survivors of pensioners who die before they receive in retirement benefits an amount equal to their contributions, and (3) lump-sum payments made under deferred profit-sharing plans. Because the source of the data from which the estimates have been developed does not permit distinction between these lump-sum benefits and the amounts representing monthly retirement benefits, precise data on average monthly or annual retirement benefit amounts cannot be derived.

Notes and Brief Reports

Aged Persons Receiving Both OASDI and OAA, Early 1967*

In order to effectively plan and evaluate old-age, survivors, disability, and health insurance (OASDHI) and public assistance programs and assess their changing relationship to each other, it is essential to have comprehensive data on aged persons who receive money payments from both programs concurrently. The latest report from the Assistance Payments Administration of the Social and Rehabilitation Service indicates that more than half those receiving old-age assistance (OAA) under State-Federal public assistance programs in February 1967 also received cash insurance benefits under OASDHI in that month.

These data have been gathered annually from the States since 1948 and include figures on the incidence of concurrent receipt and the amount of such monthly payments from the insurance and assistance programs. The most recent information presented here was taken from reports for February 1967 submitted by State public assistance agencies administering or supervising the administration of approved plans for old-age assistance.¹ They do not include recipients of medical assistance for the aged as they have in some previous years.

Early in 1967 more than 1 million persons aged 65 or over were receiving monthly income-maintenance payments both under old-age assistance and under old-age, survivors, disability, and health insurance. Persons getting both types of payments were only slightly more numerous than they had been in February 1966 and they repre-

*Data from tabular release on *Concurrent Receipt of Public Assistance Money Payments and Old-Age, Survivors, and Disability Insurance Cash Benefits by Persons Aged 65 or Over, 1948-67 and February 1967* (Social and Rehabilitation Service, Assistance Payments Administration), 1967.

¹For the most recent analysis of comparable information, see "Concurrent Receipt of Public Assistance and Old-Age, Survivors, and Disability Insurance by Persons Aged 65 and Over, Early 1963," *Welfare in Review* (Welfare Administration), March 1964.

TABLE 1.—OAA money-payment recipients also receiving OASDI cash benefits, all OAA money-payment recipients, and all OASDI cash beneficiaries aged 65 or over in the United States, specified months in 1948-1967

Month and year	OAA money payment recipients also receiving OASDI cash benefits			All OAA money payment recipients	All OASDI cash beneficiaries aged 65 or over ¹
	Number	As percent of—			
		All OAA money payment recipients	All OASDI cash beneficiaries aged 65 or over		
June 1948.....	146,000	6.1	10.0	2,365,000	1,457,000
September 1950.....	276,000	9.8	12.6	2,810,000	2,192,000
August 1951.....	377,000	13.8	11.9	2,728,000	3,174,000
February 1952.....	406,000	15.1	12.0	2,654,000	3,404,000
February 1953.....	426,000	16.3	10.7	2,572,000	4,010,000
February 1954.....	462,000	18.0	9.6	2,567,000	4,801,000
February 1955.....	487,000	19.2	8.6	2,537,000	5,640,000
February 1956.....	514,000	20.4	7.9	2,520,000	6,490,000
February 1957.....	553,000	22.2	7.8	2,489,000	7,127,000
February 1958.....	596,000	24.2	7.1	2,464,000	8,420,000
March 1959.....	644,000	26.7	6.9	2,410,000	9,379,000
February 1960.....	669,000	28.5	6.6	2,349,000	10,135,000
February 1961.....	709,000	31.0	6.5	2,288,000	10,870,000
February 1962.....	744,000	33.7	6.4	2,208,000	11,668,000
February 1963.....	807,000	37.2	6.5	2,169,000	12,488,000
February 1964.....	871,000	40.7	6.6	2,139,000	13,123,000
February 1965.....	² 944,000	² 44.7	² 7.0	2,113,000	13,580,000
February 1966.....	1,007,000	48.7	7.1	2,067,000	14,246,000
February 1967.....	1,096,000	53.1	7.0	2,062,000	15,558,000

¹ Estimated by the Social Security Administration.

² Data on concurrent receipt of OAA and OASDI estimated on national basis. State reporting waived for February 1965.

TABLE 2.—Average payments to concurrent recipients of OASDI cash benefits and OAA money payments and to nonbeneficiary-recipients of OAA money payments in the United States, specified months in 1951-67

Month and year	Average payments to concurrent recipients of OASDI cash benefits and OAA money payments			Average OAA money payment to non-beneficiary-recipients of OAA
	Average OASDI cash benefit	Average OAA money payment	Combined average OASDI and OAA payments	
August 1951.....	\$29.85	\$36.00	\$65.85	\$44.85
February 1952.....	29.60	36.85	66.45	46.60
February 1953.....	33.90	38.75	72.65	51.55
February 1954.....	33.90	40.35	74.30	50.35
February 1955.....	38.75	37.40	76.15	50.65
February 1956.....	38.70	40.35	79.05	52.00
February 1957.....	40.10	42.70	82.75	55.45
February 1958.....	40.70	43.60	84.30	59.25
March 1959.....	43.85	43.80	87.70	60.60
February 1960.....	43.30	45.80	89.10	61.70
February 1961.....	45.80	44.90	90.65	63.35
February 1962.....	47.30	41.95	89.20	65.30
February 1963.....	47.75	44.10	91.80	70.50
February 1964.....	48.80	47.80	96.65	70.15
February 1965.....	(¹)	(¹)	(¹)	(¹)
February 1966.....	52.75	47.70	100.45	77.75
February 1967.....	52.95	56.75	109.70	80.30

¹ Reporting requirement waived for 1965.

sent the same proportion (7 percent) of all OASI beneficiaries aged 65 or over. They continued to represent a rising proportion of the OAA caseload, however, increasing at the same rate as in the past 4 years (about 3½-4½ percent). For the first time, beneficiary-recipients represented more

TABLE 3.—OAA money payment recipients also receiving OASDI cash benefits, by State, February 1967

State	OAA money payment recipients also receiving OASDI cash benefits		
	Number	As percent of—	
		OAA money payment recipients	OASDI cash beneficiaries aged 65 or over
Total ¹	1,096,000	53.1	7.0
Alabama.....	59,300	52.7	26.8
Alaska.....	750	52.9	18.0
Arizona.....	6,400	49.4	6.1
Arkansas.....	31,900	50.4	19.0
California ²	207,000	72.3	15.5
Colorado.....	23,500	62.8	17.0
Connecticut.....	3,600	59.8	1.5
Delaware.....	1,000	62.9	2.9
District of Columbia.....	940	42.8	1.9
Florida.....	46,400	58.9	7.4
Georgia.....	40,300	42.9	16.4
Hawaii.....	880	54.6	2.7
Idaho.....	2,200	57.0	3.9
Illinois.....	17,400	43.7	2.0
Indiana.....	10,000	53.4	2.4
Iowa.....	13,000	53.9	4.4
Kansas.....	8,300	47.3	3.9
Kentucky.....	28,100	47.2	10.9
Louisiana.....	65,400	52.7	34.2
Maine.....	6,400	64.0	6.5
Maryland.....	2,800	37.0	1.3
Massachusetts.....	35,900	68.1	6.7
Michigan.....	20,700	52.0	3.2
Minnesota.....	14,400	52.3	4.4
Mississippi.....	35,600	48.1	23.0
Missouri.....	50,900	56.5	11.7
Montana.....	2,300	57.2	4.1
Nebraska.....	5,200	48.1	3.5
Nevada.....	1,900	77.1	9.6
New Hampshire.....	2,500	59.3	3.8
New Jersey.....	8,000	58.9	1.4
New Mexico.....	3,300	35.7	7.0
New York ²	36,100	53.7	2.3
North Carolina.....	14,300	36.2	4.5
North Dakota.....	2,100	46.2	3.7
Ohio.....	39,600	54.0	4.9
Oklahoma.....	39,600	49.1	18.9
Oregon.....	7,300	65.2	4.0
Pennsylvania.....	21,600	49.2	2.1
Puerto Rico.....	160	.6	.2
Rhode Island.....	2,600	55.4	3.0
South Carolina.....	4,400	19.8	3.2
South Dakota.....	2,800	51.8	4.2
Tennessee.....	15,700	34.1	5.6
Texas ²	117,000	50.9	17.2
Utah.....	1,900	40.3	3.3
Vermont.....	2,600	62.5	6.6
Virgin Islands.....	7	1.7	.5
Virginia.....	3,500	31.3	1.3
Washington.....	16,900	62.9	6.5
West Virginia.....	2,900	23.5	1.9
Wisconsin.....	8,800	49.8	2.2
Wyoming.....	1,400	60.7	5.8

¹ Excludes Guam; data not reported.

² March data for California, January data for New York City, and December data for Texas.

³ Estimated.

than 50 percent of all persons receiving old-age assistance.

The average monthly OASI benefit going to persons getting both types of payments in February 1967 was \$52.95, and their average OAA money payment was \$56.75. For those receiving only an OAA payment, the average amount was \$80.30 (table 2).