

HEALTH AND RETIREMENT STUDY

**Respondent Form 831 Disability Records
Restricted Data**

Data Description and Usage

Updated through Consents/Matches as of the HRS 2022 Wave
Released Date: April 2026

To the Restricted Data Investigator: This restricted data set is intended for exclusive use by you and the persons specified in the *Agreement for Use of Restricted Data from the Health and Retirement Study* and/or the *Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study*. If there are any questions about this data set and its use, refer to the HRS Restricted Data page (<https://hrs.isr.umich.edu/data-products/restricted-data>) or contact the HRS Help Desk (hrsquestions@umich.edu).

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1. Overview and Acknowledgments

The Health and Retirement Study (HRS) is a national longitudinal study of the economic, health, marital, and family status, as well as public and private support systems, of older Americans. The HRS is a rich source of longitudinal, cross-sectional data for researchers and policymakers who study aging. Funding for the Health and Retirement Study is provided by the National Institute on Aging at NIH (U01 AG009740), with supplemental support from the Social Security Administration. The study is conducted by the Institute for Social Research (ISR) at the University of Michigan.

The HRS gratefully acknowledges the special assistance of the Social Security Administration's Office of Research and Statistics for their assistance in retrieving the administrative records of HRS respondents who gave consent for those records to be used for research purposes.

2. Obtaining the Data

2a. Restricted Data Agreement

This restricted data set is intended for exclusive use by you and the persons specified in the *Agreement for Use of Restricted Data from the Health and Retirement Study* and/or the *Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study*. If you have questions about the content and use of this data set, refer to the HRS Restricted Data Web site or contact the HRS Help Desk (hqsquestions@umich.edu) by email.

2b. Access to Restricted Data

Although most HRS data sets are available to the public without restriction, certain HRS data sets contain sensitive respondent information and are only available under terms of a formal agreement negotiated between the researcher and HRS. Prospective users of HRS restricted data have two access options:

- [Virtual Desktop Infrastructure](#) (recommended)
- Traditional Licensing Agreement (deprecated)

For instructions on how to proceed, visit the [HRS Restricted Data](#) page or contact the HRS Restricted Data Applications Processing Team (hqsrdapplication@umich.edu) by email.

2c. Publications Based on Restricted Data

Your restricted data agreement specifies that you will inform HRS of any papers, publications, or presentations based on this restricted data set. Please send a copy of such publications in PDF format via e-mail to hqsquestions@umich.edu with "Attn: Papers and Publications" in the subject line. If you wish, you may include a bibliographical reference.

As an alternative, you may transmit publications in paper format by postal mail:

Health and Retirement Study
Attn: Papers and Publications
The Institute for Social Research
426 Thompson Street, 3450 ISR
Ann Arbor, Michigan 48104

3. Data Set Content

The *Form 831 Disability Records* data set contains information on the initial medical determination for HRS respondents who applied for disability benefits under Title II (Social Security) and Title XVI (Supplemental Security Income-SSI). Information is available for 4,576 respondents.

An individual respondent may have multiple records in this file. In the file received from SSA each record was keyed on SSN, BIC, RID, FLD_Y, FLD_M, DODEC_Y, DODEC_M and FLD_D (day) and DODEC_D (day). In order to preserve respondent confidentiality, HHID and PN have replaced SSN, and FLD_D and DODEC_D have been dropped. To help display individual records that may appear to be duplicates due to the drop of the day variables, the sequence variable SEQ - *SEQUENCE NUMBER FOR PRIMARY KEY USE* has been created to supplement the original key fields.

4. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines for using this data set. If you have questions or concerns that are not adequately covered here or on our Web site, or if you have any comments, please contact us. We will do our best to provide answers.

4a. HRS Internet Site

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access public data or to find out more about restricted data products and procedures, visit the [HRS Web site](http://hrsonline.isr.umich.edu).

4b. Contact Information

If you need to contact us, you may do so by one of the methods listed below.

Internet: Help Desk at our Web site (<http://hrsonline.isr.umich.edu/help>)

E-mail: <mailto:hrsquestions@umich.edu>

Postal Service:

Health and Retirement Study
The Institute for Social Research
426 Thompson Street, 3450 ISR
Ann Arbor, Michigan 48104

Appendix A: Cohort Permission Status

A1. Source Information

The *831 Disability Records* dataset is based on prospective permissions received:

- In 2006 for respondents interviewed enhanced face-to-face
- In 2008, 2010, 2012, 2014, 2016, 2018, 2020, and 2022 for enhanced face-to-face (EFTF) interview respondents who were not asked previously or refused or were non-response. EFTF respondents were also asked if their prior consents had expired.

Each new record set obtained from SSA reflects the most recent information available; therefore the latest version of *Form 831 Disability Records* will always be the most accurate. Going forward, if current information for a given respondent is missing, the most recent data elements from past datasets will be used.

A2. Information Received from SSA in Fall 2025

<i>Consent Wave</i>	<i>Summary Earnings</i>	<i>Detail Earnings</i>	<i>Benefits (MBR and PHUS)</i>	<i>Form 831 SSI</i>
2006	No	No	No	No
2008			Yes, through 2022	Yes, through 2022
2010			Yes, through 2024	Yes, through 2024
2012				
2014				
2016	Yes, through 2022	Yes, through 2022	Yes, through 2024	Yes, through 2024
2018	Yes, through 2023	Yes, through 2023		
2020				
2022				

A3. Limits for Information Obtained Through Respondent Consent Forms

1. Prior to 2006, respondent permissions were based on separate agreements between HRS and SSA. This meant that information was obtained only for the time period and respondent cohort(s) covered by the agreement.
2. In 2006 the terms of the consent form were altered, allowing HRS to obtain updates of earnings and benefits data for all years up to and including the current year. The term of these consents was defined as year of signing through 2030.
3. In 2018 the respondent consent form¹ MOA terms were revised, limiting earnings permissions to year of signing through Survey Year + 6, and benefits permissions to year of signing through Survey Year + 12.
4. In future years, post-2004 respondents will need new earnings/benefits data consents once their Survey Year + 6/+12 anniversary has been reached.

¹ In 1998 through 2014, HRS-SSA agreements included provisions for obtaining benefits and earnings information for deceased spouses. The deceased spouse option was dropped in 2016.