

Volume 9: DAF21 Source File Descriptions

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Contents

Glossary.....	iv
Overview of Documentation	vii
I. Administrative Data Sources	1
A. CER and DBAD.....	2
B. 831 & 832/833 Disability Files	2
C. SSR	3
D. NUMIDENT: SSN identification file.....	3
E. MBR.....	3
F. PHUS.....	4
G. EN payments data from the cumulative payment report by EN.....	4
H. Provider file	4
I. DCF	5
J. VRRMS.....	5
K. RSA-911 files	5
L. MEF	6
M. Waterfall file	6
II. Identifiers Containing SSN in the DAF Source Files	7

Tables

I.1. DAF21 source file extraction dates	1
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Glossary

AB	Accelerated Benefits Demonstration
ADM	Awardee Data Mart
AIME	Average Indexed Monthly Earnings
BEST	Benefits Entitlement Services Team
BFW	Benefits forgone due to work
BIC	Beneficiary Identification Code
BMF	Budget Month Factor
BOAN	Beneficiary's Own Account Number
BOND	Benefit Offset National Demonstration
BOPD	Benefit Offset Pilot Demonstration
CAN	Claim Account Number
CDR	Continuing Disability Review
CER	Characteristics Extract Record 100% Field File
COLA	Cost-of-Living Adjustment
DAC	Disabled Adult Child
DAF	Disability Analysis File (previously known as TRF)
DBAD	Disabled Beneficiary and Dependents Extract
DCF	Disability Control File
DDS	Disability Determination Services
DER	Detailed Earnings Record
DI	Disability Insurance, also referred to as SSDI
DMG	Demographic component of the DAF
DWB	Disabled Widow Beneficiaries
EN	Employment Network (also called a TTW provider)
EPE	Extended Period of Eligibility
EVS	Enumeration Verification System
EXR	Expedited Reinstatement
FBR	Federal Benefit Rate
FCI	Federal Countable Income
FIPS	Federal Information Processing Standards (in reference to U.S. Census standardized codes for uniform identification of geographic entities)
FRA	Full Retirement Age
HI	Hospital Insurance (Medicare Part A)
HOPE	Homeless Outreach Projects and Evaluation Demonstration

HUN	Housed Under Number
ICD-9	International Classification of Diseases Coding Scheme
IPE	Individualized Plan for Employment, developed by State VR Agency
IRS	Internal Revenue Service
IRWE	Impairment-Related Work Expense
LAF	Ledger Account File
LAUS	Local Area Unemployment Statistics
MBR	Master Beneficiary Record
MEF	Master Earnings File
MHTS	Mental Health Treatment Study
MIE	Medical Improvement Expected
MO	Milestone + Outcomes payment system
MPR-EVS	Mathematica's EVS
NBS	National Beneficiary Survey
NSCF	National Survey of SSI Children and Families
NUMIDENT	Numerical Identification File
OIM	Office of Information Management
OO	Outcomes-Only payment system
PAN	Person's Account Number
PASS	Program to Achieve Self-Support
PHUS	Payment History Update System
PIA	Primary Insurance Amount
PIN	Personal Identification Number
POD	Promoting Opportunity Demonstration
POMS	SSA's Program Operations Manual System
PROMISE	Promoting Readiness of Minors in SSI
Provider	Service provider under TTW (also called an EN)
PUF	Public Use File
REMICS	Revised Management Information Counts System
RIB	Retirement Insurance Benefits
RMA	Retrospective Monthly Accounting
RSA	Rehabilitation Services Administration
RSA-911	RSA Case Service Report
SAIPE	Small Area Income and Poverty Estimates
SAS	Statistical Analysis Software, used to produce the DAF

SCWF	SSI Companion Work File
SED	Supported Employment Demonstration
SER	Summary Earnings Record
SGA	Substantial Gainful Activity
SMI	Supplemental Medical Insurance (Medicare Part B)
SNAP	Supplemental Nutrition Assistance Program
SSN	Social Security Number
SSA	Social Security Administration
SSDI	Social Security Disability Insurance (also referred to as DI)
SSI	Supplemental Security Income
SSI-LF	SSI - Longitudinal File
SSR	Supplemental Security Record
STW	Suspension or termination of cash benefits for work
T2	Title II, the SSDI Program
T16	Title XVI, the SSI Program
TANF	Temporary Assistance for Needy Families
TCNEI	Total countable non-earned income
TKT	DAF component containing data related to TTW participation
TRF	Ticket Research File, now called the DAF
TTW	Ticket to Work
TWP	Trial Work Period
VR	Federal/State Vocational Rehabilitation program/agency
VRRMS	Vocational Rehabilitation Reimbursement Management System; data from this system is contained in the Payments component
YTD	Youth Transition Demonstration

Overview of Documentation

The documentation for the DAF consists of the eleven volumes described below. Questions about these documents should be directed to ORDES.DAF@ssa.gov. All of these documents are available at <https://www.ssa.gov/disabilityresearch/daf.html>.

- **Volume 1: Getting Started with the DAF21.** Provides an overview of the structure and contents of the DAF and related linkable files.
- **Volume 2: Working with the DAF21.** Contains practical suggestions such as how to extract data and interpret blank or missing variables as well as more detailed information on DAF data marts and linkable files.
- **Volume 3: Tips for Conducting Analysis with the DAF21.** Contains suggestions for working with common research concepts in the DAF such as program participation, benefits paid versus benefits due, and constructed measures related to beneficiary work activity resulting in the loss of cash benefits.
- **Volume 4: Lists of DAF21 Variables.** Contains lists of new, changed, and deleted variables, as well as lists of variables by DAF component and analytic category.
- **Volume 5: DAF Variable Detail Pages.** Contains specifications for each DAF variable, including name, definition, data format, identification of the DAF component to which it belongs, data source, availability, and (where applicable) SAS code used to construct the variable.
- **Volume 6: Validating the DAF21 Against Other Sources.** Provides an explanation of validation methods and summary of validation results.
- **Volume 7: DAF21 Development History and Construction Methods.** Describes key changes in DAF construction methodology over time as well as a description of each step in the current year DAF construction process.
- **Volume 8: DAF21 Construction Workflow Charts and Task Tables.** Provides detailed information in both chart and table format on each step in the current year DAF construction process.
- **Volume 9: DAF21 Source File Descriptions.** Describes the administrative source files used to construct the DAF.
- **Volume 10: DAF21 Administrative Source File Documentation.** Contains documentation from SSA or other agencies on the administrative source files described in Volume 9.
- **Volume 11: DAF21 Construction Code.** Contains all SAS code used to construct the DAF.
- **Volume 12: DAF21 RSA Administrative Source File Documentation.** Contains a description of the processing of Rehabilitation Services Administration (RSA) data for linkage to the DAF, along with documentation from RSA on the RSA-911 files.

The following table provides specific locations for common research-related questions and issues.

In order to ...	Refer to ...
Get started with a research task	Volume 2, "Working with the DAF21," for information about selecting beneficiaries using finder files versus selection criteria
Identify what's changed in the latest version of the DAF	Volume 1, "Getting Started with the DAF21"
View lists of DAF variables	Volume 4, "Lists of DAF21 Variables"
Understand individual variable definitions, specifications, and value ranges	Volume 5, "DAF Variable Detail Pages"
Understand the structure of the DAF data files at a high level	Volume 1, "Getting Started with the DAF21"
Identify variables for a specific research task	Volume 4, "Lists of DAF21 Variables," for a list of variables contained within each DAF file and by analytic category
Understand the beneficiaries for which the DAF does and does not contain data	Volume 1, "Getting Started with the DAF21"
Identify administrative data sources for the DAF	Volume 9, "DAF21 Source File Descriptions"
Understand the linkage of the DAF to RSA-911 data and contents of the RSA files	Volume 12, "DAF21 RSA Administrative Source File Documentation"
Generate ideas for using the DAF more efficiently	Volume 1, "Getting Started with the DAF21" and Volume 2, "Working with the DAF21"
Find suggested ways to identify common research concepts in the DAF, such as calculating age of retirement, or disability title	Volume 3, "Tips for Conducting Analysis with the DAF21"
Understand what variables have changed in the most recent DAF	Volume 4, "Lists of DAF21 Variables"
Read about how information in the DAF is validated against other sources	Volume 6, "Validating the DAF21 Against Other Sources"

I. Administrative Data Sources

In this volume, we describe the files from which the Disability Analysis File (DAF) is constructed as well as the Master Earnings File (MEF), which can be linked with the DAF. The RSA-911 files can also be linked to the DAF, and are referenced in what follows, but more fully described in Volume 12. Some files contain information particular to either the Supplemental Security Income (SSI) or the Social Security Disability Insurance (SSDI) program, while other files contain information for both types of participants, e.g., the Disability Control File (DCF) and the 831 & 832/833 Disability files. The detail pages for DAF variables contained in Volume 5 indicate the source file(s) for each variable. Layouts of each SSA administrative source file and the MEF are provided in Volume 10. Layouts for the RSA administrative source file are provided in Volume 12.

The table below indicates the date on which data from each administrative source file used to construct the DAF proper was extracted. Any retroactive updates to the administrative data sources listed below done after the extraction dates listed will not be reflected in the DAF21. For example, the DAF21 record for a currently entitled SSI beneficiary whose earnings data for 2021 on the SSI Longitudinal File were updated in April 2021 will not reflect the updated earnings data because the update was performed after the SSI Longitudinal File data was extracted in February 2021. The DAF22 would reflect this update.

Table I.1. DAF21 source file extraction dates

SSA administrative data source file	Date extracted
Monthly Snapshot Files	
DBAD	02/15/2022
CER	02/15/2022
831 & 832/833	03/22/2022
SSI-LF	05/02/2022
SSR Additional Variables	03/01/2022
SSR Earnings	4/25/2022
NUMIDENT	04/20/2022
MBR/PHUS	03/29/2022
EN Payments Data	07/19/2022
Provider	06/28/2022
DCF	
Ticket	05/27/2022
Earnings	06/20/2022
Demographic	04/22/2022
CDR	12/14/2022
VRRMS	10/01/2021
Waterfall	11/04/2022
RSA-911 data (accessible to DAF users with permission from Department of Education)	02/14/2023
MEF (accessible only to select SSA staff)	04/24/2023

A. CER and DBAD

The Characteristics Extract Record 100% Field File (CER)¹ and Disabled Beneficiary and Dependents Extract (DBAD) files provide monthly snapshots of SSI and SSDI program activity, respectively. These snapshot files are extracts from the Supplemental Security Record (SSR) and Master Beneficiary Record (MBR), respectively, and are taken on a monthly basis and are not retroactively updated by SSA, although they are extracted at a single point in time for the year being added to the DAF. The CER includes demographic information such as address, data on earned and unearned income, and an indicator for Medicaid eligibility. Though these measures are used to initially construct the universe of individuals contained in the DAF, relatively few data elements are retained on the DAF. This is because the snapshot aspect of the data may not reflect the most currently known picture of a beneficiary's status. For example, a beneficiary whose January 2013 CER snapshot indicates no earned income will not be updated if SSA discovers earnings six months later and inputs them to the SSR from which the CER are extracted.

The DBAD files include variables containing information on disabled beneficiaries and their families such as payment computation data and entitlement date. As with the CER, the DBAD files are not retroactively updated and, as a result, relatively few measures from this source are retained on the DAF. However, the issue of retroactivity is less critical for SSDI beneficiaries because their program data is less dynamic than for SSI beneficiaries.

B. 831 & 832/833 Disability Files

The 831 Disability File contains records of initial medical decisions made by the Disability Determination Services (DDS), as reported on the SSA-831 disability determination form. The 832/833 Disability files contain records of medical decisions made in the course of Continuing Disability Reviews (CDRs), with each new determination resulting in a new record.² The results are recorded on either the SSA-832 disability form for SSI beneficiaries or the SSA-833 disability form for SSDI beneficiaries. Each record in the 831 & 832/833 Disability files can be identified by an individual's Social Security Number (SSN) and Beneficiary Identification Code (BIC).³ The files are archived yearly and date back to 1988. As a result, medical data derived from 831 & 832/833 data for beneficiaries who have been receiving benefits since before 1988 may be incomplete.

¹ The Revised Management Information Counts System (REMICS) and SORD files used in the early years of DAF construction were later replaced by the CER.

² Note that the term CDR has a somewhat separate meaning in the context of the review of work performed by SSDI beneficiaries. These are generally called "work CDRs" as opposed to "medical CDRs" and do not produce records in the 831 & 832/833 Disability Files.

³ In the 831 & 832/833 files, SSN refers to the Person's Account Number (PAN) of an SSI beneficiary and to the Claim Account Number (CAN) of an SSDI beneficiary. BIC only applies to SSDI claims; it is always set to an 'A,' the code indicating a primary beneficiary, for SSI recipients.

C. SSR

The SSR is the main file used for administering the SSI program. It includes records for all individuals who have ever applied for SSI. Records are filed under the Housed Under Number (HUN), which is the SSN of the beneficiary or, in the case of married couples who live together and are both eligible for SSI, the first member of a married couple to become eligible for SSI. Each record can contain up to three individuals, covering the beneficiary and an eligible or ineligible spouse, or a child with up to two parents living in the same household. All individuals on a single record can be identified by their SSN, stored as the PAN. In certain cases, e.g. a change in marital status, individuals may appear on multiple records. There are several standard extracts available for the SSR, such as the SSI Longitudinal File and the CER, both of which are used in DAF construction. Additional DAF uses an additional custom SSR extract for SSI earnings. Many more SSR variables on the DAF come from the SSI Longitudinal File and SSR custom extract than the CER described above because of the retroactivity issue associated with the monthly snapshot files. The SSI Longitudinal File contains a combination of longitudinal and one-time data, including type of household, benefit amounts and payment dates, and earnings information used in benefit calculations.

D. NUMIDENT: SSN identification file

The Master File of Social Security Number Holders and Applications, better known as the SSN Identification (NUMIDENT) file, contains records of applications for original and replacement Social Security cards. Every SSN ever issued has an associated NUMIDENT record, which include name, SSN, date and place of birth and death, and other demographic information. Records are initiated by Social Security card applications and updated with new demographic information, such as name change or date of death, by many data sources. Each NUMIDENT record can have multiple sections or “entries” to document these changes in individual information.

E. MBR

The MBR is the main file used for administering Old Age and Survivor’s Insurance (OASI) and SSDI payments. The MBR contains records for all individuals who have applied for benefits, including awards, disallowances, terminations, and withdrawals. A combination of longitudinal and one-time data, such as monthly payment information and demographic information, is stored on each record. Each MBR record is filed under a CAN, which is the SSN of the worker whose earnings serve as the basis for the benefit entitlement. MBR records may have more than one beneficiary, and therefore multiple BICs, which are two-character identifiers that describe the relationship of the beneficiary to the worker whose SSN is contained in the CAN. Each beneficiary’s SSN is stored in the Beneficiary’s Own Account Number (BOAN). For a beneficiary receiving SSDI benefits on the basis of his or her own earnings (a primary beneficiary), CAN and BOAN contain the same SSN. For a beneficiary receiving SSDI benefits on the basis of a parent’s or spouse’s earnings (an auxiliary beneficiary), BOAN and CAN are different. A beneficiary can appear on multiple MBR records when the factors of entitlement

reference more than one SSN, such as their own (as a result of their own work and disabling condition) and a parents (as a result of their parents work history and their own disabled condition acquired before age 21). The DBAD monthly snapshot files, as described above, are extracted from the MBR.

F. PHUS

The Payment History Update System (PHUS) contains SSDI benefit payment information for the purpose of taxing Social Security benefits, which became subject to taxation in 1984. Although the data are physically housed at the end of an MBR record, the PHUS is a logically distinct database. While the MBR file reflects payment information beginning with the date of entitlement, the PHUS reflects the actual disbursement date and amount. PHUS extracts can be requested via the MBR extract process, and each extract includes the MBR in addition to the PHUS data. Like the MBR, records are organized by CAN, with each individual on a record identified by their CAN plus BIC. Payment history information is stored as payment events within each CAN-BIC combination. Each event can contain payment history for one or multiple months. For some types of payments made to working beneficiaries known as “Facility of Payment” cases,⁴ PHUS data are not available prior to January 1996, and the only available payment information is stored in the MBR Payment History table. Because the DAF only includes beneficiaries entitled from January 1996 through the end of the DAF year, this situation will affect only the 1994 and 1995 monthly variables in a limited number of cases.

G. EN payments data from the cumulative payment report by EN

The Office of Research, Demonstration, and Employment Support (ORDES, formerly known as the Office of Employment Support Programs (OESP)), uses the internet Ticket Operations Provider Support System (iTOPSS), an internal SSA database, to evaluate payments to Ticket to Work (TTW) providers. We construct the Employment Network (EN) payments data on the DAF using the Cumulative Payment Report by EN. It contains data such as the TTW provider name, the amount of the payment, the date of the payment, and the triggering event.

H. Provider file

The Provider file contains data related to the employment service providers (ENs and State Vocational Rehabilitation [VR] Agencies acting as ENs under TTW program rules) contracted with SSA under the TTW program, such as the provider’s Data Universal Numbering System (DUNS) identifier, name, and the effective date of their contract with SSA. This file contains no data on SSA beneficiaries and is used exclusively for identifying the type of TTW provider, EN or State VR Agency.

⁴ In months prior to January 1996, a working beneficiary may have received a readjusted benefit for an amount that would be due other members of the same household if the worker were in suspense due to work. This process was called Facility of Payment.

I. DCF

The DCF, created by SSA in 2002, contains records for all beneficiaries who have applied for or received a disability-based SSA benefit, either SSDI or SSI. Records are organized by person and filed under a Claimants Own SSN (COSSN). The DCF contains data organized into multiple groups, including person data, medical data, earnings data, TTW data, and medical and work CDRs, each stored in its own DCF table or group of tables such that one data group can be accessed independently of the others. Some data groups (such as for Person Data) only have one occurrence per record, whereas others (such as Earnings Data) may have multiple occurrences per record.

J. VRRMS

This file originates from SSA's Vocational Rehabilitation Reimbursement Management System (VRRMS) and contains information related to traditional Cost Reimbursement payments to State VR Agencies. More specifically, it contains data on federal/state Vocational Rehabilitation (VR) program requests for payment for services provided to SSA beneficiaries who have sustained Substantial Gainful Activity (SGA) levels for 9 months within a 12-month period. Data elements in the VRRMS file include information such as claimed and allowed payment amounts. The VRRMS includes separate records for each VR service spell a beneficiary has. In the DAF, these separate VRRMS records are rolled up into a single record per beneficiary and identified by the beneficiary's SSN. In March 2017, the VRRMS data file was updated substantially; the DAF now reflects that by maintaining two versions of the VRRMS files.

K. RSA-911 files

The Department of Education provides the Case Service Report Manual (RSA-911) for the State Vocational Rehabilitation Services Program and the State Supported Employment Services Program, simply referred to as the RSA-911. More information about RSA-911 files, their processing for the DAF, and the layouts for Policy Directives relevant during the DAF years are available in Volume 12. Each annual RSA-911 file contains demographic and programmatic data for RSA VR program participants during a given fiscal or calendar year (RSA's reporting period has changed over time). Data elements include information such as program entry and exit dates and reason for service closure. In July 2017, the RSA-911 underwent a major revision to include all RSA participants; prior to that the file included only RSA participants who had a closed VR case. As the average length of enrollment in the VR program is two years, the earlier RSA-911 files had what amounted to a built in two-year lag since the applicant applied for services. For example, if a participant entered the VR program in 2004 and exited in 2006, his or her participation information would be included only in the 2006 file. There would be no record of their participation in VR in either the 2004 or 2005 files. Because the later files include all active VR cases there is no lag. These changes are described in more detail in Volumes 1-3.

There are three applicable file layouts for the earlier source data, one of the pre-2002 period, one for 2002 through 2013, and one for 2014 through June of 2017. The newer files covering the period from July 2017 onwards follow a fourth layout. These layouts are available in Volume 12.

L. MEF

The MEF contains earnings data for each SSN ever issued. This earnings information comes from the W-2 form collected by the Internal Revenue Service (IRS). The MEF is accessed by SSA on the basis of authority granted in the IRS code. The data are only available and linkable to the DAF by staff at SSA. External researchers wanting to access this file must work indirectly through SSA under statutory access restrictions.

M. Waterfall file

The Waterfall file is created and maintained by the Office of the Deputy Commissioner for Operations (DCO), the Office of Disability Determinations (ODD), and Division of DDS Resource and Workload Management (DDRWM) and serves as one of the primary master files of DDRWM's automated system on Continuing Disability Reviews (CDRs). It resides on SSA's MISF mainframe, and contains one record for every centrally-initiated periodic CDR that received a full medical review after 1995. The Waterfall file does not include (1) CDRs started by a field office, (2) CDRs that did not result in a decision, or (3) CDR mailers that did not result in a full medical review. There are several variants of the Waterfall file that are useful for different purposes. The DAF uses the Waterfall Extract and Track Active files.

II. Identifiers Containing SSN in the DAF Source Files

As SSA's basic person-level identifier, variables containing SSNs are especially critical to understanding DAF data sources and how to link within the system of DAF files and to external linkable files. In both the administrative source data and the DAF, multiple variables contain SSNs and some of these are not the SSN of the beneficiary to whom the record pertains. Some of the information below is contained in the individual sections above, but it is consolidated and in some cases repeated here for ease of reference.

In the SSR and its monthly snapshot extract CER, the SSA administrative data source for SSI beneficiaries, the beneficiary's SSN is stored under two variables: PAN and HUN. For unmarried beneficiaries and married beneficiaries who do not live with a spouse who also receives SSI, the HUN and PAN will be the same. When two SSI beneficiaries are married to and live with each other, however, the application is considered to be "housed under" one member of the couple, usually the one with the earlier application date, and the SSN of the housed-under beneficiary is stored in the HUN variable. The variable HUN is retained in the DAF as is the PAN which is called SSN. See Volume 3 for more information about identifying SSI couples.

In the MBR and its monthly snapshot extract DBAD, the SSA administrative data source for SSDI beneficiaries, the beneficiary's SSN is stored in the BOAN variable. In addition, the CAN variable is the SSN of the person whose earnings serve as the basis of the SSDI benefit record (the primary beneficiary). For a beneficiary receiving SSDI benefits on the basis of his or her own earnings (a primary beneficiary), CAN and BOAN contain the same SSN. For a beneficiary receiving SSDI benefits on the basis of a parent's or spouse's earnings (an auxiliary beneficiary), BOAN and CAN are different, with BOAN containing the auxiliary's own SSN and CAN containing the parent's or spouse's SSN. The variable CAN is retained in the DAF, as is the BOAN, which is called SSN.

In the 831 & 832/833 Disability Files, an administrative data source for medial decision data for both SSI and SSDI beneficiaries, a beneficiary's SSN is stored in the variable SSN and is retained with that name on the DAF. For SSI beneficiaries, the SSN variable contains the PAN and all of the BICs are A. For SSDI beneficiaries, the SSN variable contains the CAN and the BIC is the actual BIC. We pull the 831 & 832/833 files using a finder that contains the CAN from the DBAD files and the PAN from the CER100% files.

In the NUMIDENT, an administrative data source for demographic data for all SSNs ever issued, the beneficiary's SSN is stored in the variable SSN and is retained with that name on the DAF.

In the DCF, an administrative data source for many variables for both SSDI and SSI beneficiaries, the beneficiary's SSN is stored in the variable Claimant's Own SSN (COSSN).

In the Payment files, both EN Payment data, a source for payments made to providers under the TTW program, and VRRMS, a source for traditional Cost Reimbursement payments to State VR

Agencies, a beneficiary's SSN is stored in the variable SSN and is retained with that name on the DAF.

In the Waterfall File, the variable named SSN represents the PAN for SSI and the CAN for SSDI beneficiaries. The variable named BOAN represents the PAN for SSI and BOAN for SSDI.

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