NOTE: WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX, THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.
S003 BRANCHPOINT: IF R’s SPOUSE/PARTNER FROM PREVIOUS WAVE IS NO LONGER THEIR SPOUSE/PARTNER (A020=5) or R IS WIDOWED (B058=2) or R IS (DIVORCED OR HAD AN ANNULMENT) (B058=1), CONTINUE ON TO S003 OTHERWISE, GO TO SECTION T

***BEGINNING OF S003 LOOP: QUESTIONS S003 THROUGH S015 ARE REPEATED FOR ALL FOUR INCOME TYPES.***

S003

IF FIRST LOOP:

IF R’s SPOUSE/PARTNER IS DEAD AND THEY WERE STILL COUPLED AT THE TIME OF SPOUSE’s/PARTNER’s DEATH (A202=1 or B058=2):

Financial situations often change with the death of a [husband/wife/partner].

Thinking back to the time surrounding your [husband/wife/partner]'s death did any income from Social Security start, stop or change because of [his/her] death?

IF R IS NO LONGER COUPLED WITH LAST IW’s SPOUSE/PARTNER AND SPOUSE/PARTNER IS STILL LIVING OR DIED AFTER THE SPLIT} (A023=1 or A202=5 or B058=1):

IF R IS DIVORCED OR HAD AN ANNULMENT} SINCE LAST IW (X066=1):

Financial situations may change with divorce.

Thinking back to your divorce, did any income from Social Security start, stop or change because of it?

IF R SPLIT FROM PARTNER SINCE LAST IW (X066=3):

Financial situations may change with separation from a partner.

Thinking back to your separation, did any income from Social Security start, stop or change because of it?

FOR SECOND, THIRD AND FOURTH LOOPS:

Did any income from

LOOP 2: Supplemental Security Income
LOOP 3: Veterans benefits
LOOP 4: other retirement pensions or annuities

start, stop or change because of [[his/her] death/the divorce/the separation]?

1. START  2. STOP  3. CHANGE  5. NO  8. DK  9. RF

GO TO S010  GO TO END OF S003 LOOP (AFTER S015)

S004

What was the usual amount before [your [husband/wife/partner]'s death/the divorce/the separation]?

[IWER: DO NOT PROBE DK/RF]
S005-S007. folding Sequence:

Question wording: Did it amount to less than $___ per month, more than $___ per month, or what?

Amount Before:

**LOOP 1: SOCIAL SECURITY**
UNFOLDING PROCEDURE: 2UP1DOWN

**INCOME STOPPED:**
BREAKPOINTs: $250, $500, $750, $1,000
ENTRY POINT: $500

**INCOME CHANGED:**
BREAKPOINTs: $100, $350, $650, $1,000
ENTRY POINT: $350

**LOOP 2: SUPPLEMENTAL SECURITY INCOME**
UNFOLDING PROCEDURE: 1UP1DOWN

**INCOME STOPPED:**
BREAKPOINTs: $100, $300, $800
ENTRY POINT: $300

**INCOME CHANGED:**
BREAKPOINTs: $100, $300, $800
ENTRY POINT: $300

**LOOP 3: VETERANS BENEFITS**
UNFOLDING PROCEDURE: 1UP1DOWN

**INCOME STOPPED:**
BREAKPOINTs: $80, $200, $300
ENTRY POINT: $200

**INCOME CHANGED:**
BREAKPOINTs: $500, $1,000, $1,500
ENTRY POINT: $1,000

**LOOP 4: OTHER RETIREMENT PENSIONS OR ANNUITIES**
UNFOLDING PROCEDURE: 1UP1DOWN

**INCOME STOPPED:**
BREAKPOINTs: $250, $400, $1,000
ENTRY POINT: $400

**INCOME CHANGED:**
BREAKPOINTs: $300, $700, $1,000
ENTRY POINT: $700

---

**S008 BRANCHPOINT: GO TO S010 BRANCHPOINT**

**S008**

**PER:**

2. WEEK  3. EVERY TWO WEEKS/BI-WEEKLY  4. MONTH
6. YEAR
7. OTHER (SPECIFY) S009
8. DK
9. RF

S010 BRANCHPOINT: IF SOCIAL SECURITY STOPPED BECAUSE OF SPOUSE's/PARTNER's {DEATH OR DIVORCE OR SEPARATION} (S003=2), GO TO END OF S003 LOOP (AFTER S015)

S010
What was the usual amount after [your [husband/wife/partner]'s death/the divorce/the separation]?
[IWER: DO NOT PROBE DK/RF]

AMOUNT

0

DK
RF

GO TO S014
GO TO END OF S003 LOOP (AFTER S015)
S011-S013. Unfolding Sequence:
Question wording: Did it amount to less than $___ per month, more than $___ per month, or what?

Amount After:

LOOP 1: SOCIAL SECURITY
 UNFOLDING PROCEDURE: 2UP1DOWN
 INCOME STARTED:
  BREAKPOINTS: $250, $500, $750, $1,000
  ENTRY POINT: $500
 INCOME CHANGED:
  BREAKPOINTS: $100, $200, $500, $750
  ENTRY POINT: $200

LOOP 2: SUPPLEMENTAL SECURITY INCOME
 UNFOLDING PROCEDURE: 2UP1DOWN
 INCOME STARTED:
  BREAKPOINTS: $150, $200, $300, $500
  ENTRY POINT: $200
 UNFOLDING PROCEDURE: 1UP1DOWN
 INCOME CHANGED:
  BREAKPOINTS: $100, $200, $600
  ENTRY POINT: $200

LOOP 3: VETERANS BENEFITS
 UNFOLDING PROCEDURE: 1UP1DOWN
 INCOME STARTED:
  BREAKPOINTS: $300, $500, $700
  ENTRY POINT: $500
 INCOME CHANGED:
  BREAKPOINTS: $200, $400, $700
  ENTRY POINT: $400

LOOP 4: OTHER RETIREMENT PENSIONS OR ANNUITIES
 UNFOLDING PROCEDURE: 1UP1DOWN
 INCOME STARTED:
  BREAKPOINTS: $150, $300, $750
  ENTRY POINT: $300
 INCOME CHANGED:
  BREAKPOINTS: $200, $400, $600
  ENTRY POINT: $400

S014 BRANCHPOINT: GO TO END OF S003 LOOP (AFTER S015)

S014
PER:

  2. WEEK  3. EVERY TWO WEEKS/BI-WEEKLY  4. MONTH  6. YEAR

  7. OTHER (SPECIFY)  95. LUMP SUM  98. DK  99. RF

***END OF S003 LOOP: REPEAT QUESTIONS S003 THROUGH S015 FOR ALL FOUR INCOME TYPES. THEN CONTINUE ON TO S016.***
Did your earnings from work or your work hours start, stop, or change after [your husband/wife/partner]'s death/the divorce/the separation? 

1. START  2. STOP  3. CHANGE  5. NO  8. DK  9. RF

GO TO S027

S017

What was the usual amount of your earnings before [your husband/wife/partner]'s death/the divorce/the separation? 

[IWER: DO NOT PROBE DK/RF]

AMOUNT

0  DK  RF

GO TO S021

GO TO S023

S018–S020. Unfolding Sequence:
Question wording: Did it amount to less than $___ per month, more than $___ per month, or what?

PROCEDURE: 1UP1DOWN

**INCOME STOPPED:**
- BREAKPOINTS: $400, $600, $1,000
- ENTRY POINT: $600

**INCOME CHANGED:**
- BREAKPOINTS: $400, $600, $1,000
- ENTRY POINT: $600

S021 BRANCHPOINT: GO TO S023

S021

PER:

2. WEEK  3. EVERY TWO WEEKS/BI-WEEKLY  4. MONTH

6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

S022
S023
And how many hours per week did you usually work before
[your [husband/wife/partner]'s death/the divorce/the separation]?
[IWER: DO NOT PROBE DK/RF]

HOURS

DK  RF

GO TO S027 BRANCHPOINT

S024-S026 Unfolding Sequence
Question wording: Did it amount to less than ___ hours per month, more
than ___ hours per month, or what?

PROCEDURE: 1Up
WORK HOURS STOPPED:
BREAKPOINTS: 20, 40
ENTRY POINT: 20
WORK HOURS CHANGED:
BREAKPOINTS: 20, 40
ENTRY POINT: 20

S027 BRANCHPOINT: IF WORK EARNINGS STOPPED BECAUSE OF SPOUSE’s/PARTNER’s
(DEATH OR DIVORCE) (S016=2), GO TO S037
S027
What was the usual amount of your earnings after [your [husband/wife/partner]'s death/the divorce/the separation]?

[IWER: DO NOT PROBE DK/RF]

| AMOUNT | 0 | DK | RF |

GO TO S031    GO TO S033

S028-S030. Unfolding Sequence:
Question wording: Did it amount to less than $___ per month, more than $___ per month, or what?

PROCEDURE: 1UP1DOWN
INCOME STARTED:
BREAKPOINTS: $300, $500, $1,000
ENTRY POINT: $500

S031 BRANCHPOINT: GO TO S033

S031
PER:

| 2. WEEK | 3. EVERY TWO WEEKS/BI-WEEKLY | 4. MONTH |
| 6. YEAR | 7. OTHER (SPECIFY) | 8. DK | 9. RF |

S032
S033
And how many hours per week did you usually work after [your [husband/wife/partner]'s death/the divorce/the separation]?
[IWER: DO NOT PROBE DK/RF]

----------
HOURS
----------

GO TO S037

S034-S036. Unfolding Sequence:
Question wording: Did it amount to less than ___ hours per month, more than ___ hours per month, or what?

PROCEDURE: 1Up
WORK HOURS STARTED:
BREAKPOINTS: 20, 40
ENTRY POINT: 20
WORK HOURS CHANGED:
BREAKPOINTS: 20, 40
ENTRY POINT: 20

S037
Did the type, cost, or coverage of your health insurance change as a result of [your [husband/wife/partner]'s death/the divorce/the separation]?

1. YES  5. NO  8. DK  9. RF

GO TO S040 BRANCHPOINT

S038
What changed about your health insurance?
[IWER: CHOOSE ALL THAT APPLY]

1. COST BECAME HIGHER
2. COST BECAME LOWER
3. FEWER SERVICES COVERED
4. MORE SERVICES COVERED
5. LESS CHOICE OF PHYSICIANS
6. MORE CHOICE OF PHYSICIANS
7. MORE CONVENIENT
8. LOST PLAN
97. OTHER (SPECIFY)

98. DK  99. RF

S040 BRANCHPOINT: IF R WAS NO LONGER COUPLED WITH LAST-IW SPOUSE/PARTNER WHEN S/HE DIED (A202 NOT 1) and R DID NOT REPORT BEING WIDOWED SINCE R’s LAST IW (B058 NOT 2), GO TO S055 BRANCHPOINT
S040
Did you receive a life insurance settlement?
(Please include any that you may have already mentioned.)

1. YES    5. NO    8. DK    9. RF

GO TO S042

S041
How much did it amount to?

[IWER: INCLUDE ONLY SETTLEMENT RELATED TO SPOUSE/PARTNER’S DEATH]
[IWER: DO NOT PROBE DK/RF]

DK    RF

AMOUNT

GO TO S042

S061-S063 (Tag# = S041.3, S041.5, S041.7) Unfolding Sequence:
Question text: Does it amount to a total of less than $___, more than $___, or what?

UNFOLDING PROCEDURE: 2Up1Down
BREAKPOINTS: $5,000, $10,000, $25,000, $50,000
ENTRY POINT: $10,000

S042
Did you receive a lump-sum pension settlement?

1. YES    5. NO    8. DK    9. RF

GO TO S044
S043
How much did it amount to?

[IWER: DO NOT PROBE DK/RF]

AMOUNT  

GO TO S044

S044
Not counting what was covered by insurance or your [husband/wife/partner]'s estate, what were the expenses associated with the death, that is, for funeral expenses, legal fees, etc.?

[IWER: DO NOT PROBE DK/RF]

[IWER: ENTER [CTRL-D] IF NOT SETTLED YET]

AMOUNT  

GO TO S048

S045-S047. Unfolding Sequence:
Question wording:  Would it amount to less than $___ , more than $___ , or what?
PROCEDURE: 2Up1Down
BREAKPOINTS: $2,000, $5,000, $7,000, $10,000
ENTRY POINT: $5,000
S048
To pay the expenses associated with [his/her] death and any illness that led to [his/her] death, did you have to sell assets, withdraw money that normally would not be touched, get help from a relative, or from a church or other institution, or do anything else special to find the money?

[IWER: CHOOSE ALL THAT APPLY]

1. YES, SELL ASSETS
2. YES, WITHDRAW MONEY
3. YES, GOT HELP FROM A RELATIVE
4. INSTITUTION OR CHARITY
5. DID NOT DO ANYTHING SPECIAL
7. YES, OTHER (SPECIFY)
8. DK
9. RF

S050 BRANCHPOINT: IF R DID NOT GET HELP FROM A RELATIVE (S048 NOT 3), GO TO S052

S050
Was that a child or grandchild of yours or your [husband/wife/partner], or was it some other relative who helped?

1. CHILD/CHILD-IN-LAW
2. OTHER RELATIVE
3. SOMEONE ELSE
6. GRANDCHILD
8. DK
9. RF

S051/S070
(Which child is that?)

IWER: IF GRANDCHILD:
Which child of yours or your [husband/wife/partner]’s is the parent of that grandchild?

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
<th>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. TO 42. CHILD NAME(S)</td>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
</tr>
<tr>
<td>92. DECEASED CHILD</td>
<td></td>
</tr>
<tr>
<td>93. ALL CHILDREN EQUALLY</td>
<td></td>
</tr>
<tr>
<td>96. ALL CHILDREN - &quot;EQUALLY&quot; NOT MENTIONED</td>
<td></td>
</tr>
<tr>
<td>98. DK</td>
<td></td>
</tr>
<tr>
<td>99. RF</td>
<td></td>
</tr>
</tbody>
</table>

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.
S052 (Tag#=S052.5)
In which state or country did your [husband/wife/partner] die?

STATE

97. OTHER COUNTRY (SPECIFY)
98. DK
99. RF

NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.

S054
What was the cause of [his/her] death?

CAUSE OF DEATH

DK
RF

S055 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW, GO TO S056
IF R’s SPOUSE/PARTNER FROM PREVIOUS WAVE IS NO LONGER LIVING (A023=5) or R IS WIDOWED (B058=2), GO TO S056

S055
Because of the [divorce/separation], do you expect to receive less in the way of life insurance benefits if your former [husband/wife/partner] dies?

1. YES
5. NO
8. DK
9. RF

S056
Did you lose any part of your claim on your [former/late] [husband/wife/partner]'s pension?

1. YES
5. NO
8. DK
9. RF

GO TO S058 BRANCHPOINT

S057
Did you receive any money or property from your [former/late] [husband/wife/partner] to compensate for the loss of your claim on [his/her] pension?

1. YES
5. NO
8. DK
9. RF

S058 BRANCHPOINT: IF R WAS STILL COUPLED WITH LAST-IW SPOUSE/PARTNER WHEN S/HE DIED (A202=1) or R IS WIDOWED (B058=2), GO TO S059 (S ASSIST)
All in all, what were your expenses associated with the [divorce/separation], that is, legal fees and costs?

[IWER: DO NOT PROBE DK/RF]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td>GO TO S059</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

S067-S069 (Tag# = S058.3, S058.5, S058.7) Unfolding Sequence:
Question text: Does it amount to a total of less than $___, more than $___, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $500, $1,500, $5,000, $15,000
ENTRY POINT: $1,500

S059 S ASSIST
IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION S — WIDOWHOOD/DIVORCE?

<table>
<thead>
<tr>
<th>1. NEVER</th>
<th>2. A FEW TIMES</th>
<th>3. MOST OR ALL OF THE TIME</th>
<th>4. THE SECTION WAS DONE BY A PROXY REPORTER</th>
</tr>
</thead>
</table>

GO TO SECTION T