
*NOTE: WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX,
THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.*

MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A REINTERVIEW R (Z076=1)

THIS IS A SELF INTERVIEW (A009=1)

THIS IS A FACE-TO-FACE IW AT THIS POINT (W311=2)

R'S LOGGING ID NUMBER FOR MAILED DOCUMENTS (per X081)

R IS WORKING FOR SOMEONE ELSE (J021=1);

R IS SELF-EMPLOYED (J021=2)

R HAS ONLY ONE PENSION PLAN ON CURRENT JOB ({J269 or J270 or J335 or J336}=1)

R HAS MORE THAN ONE PENSION PLAN ON CURRENT JOB ({J269 or J335}={2-8} or
{J270 or J336}=3)

R IS NOT A GOVERNMENT EMPLOYEE (J720 NOT 1)

R IS A UNION MEMBER (J266=1)

* A variable fieldname and code reference is shown at its first occurrence
in the questionnaire, but in some cases, especially when it is common,
is not shown after that.

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V321 BRANCHPOINT: IF THIS IS
    {NOT A CORE INTERVIEW
    or NOT A SELF INTERVIEW (A009=1)
    or NOT A FACE-TO-FACE IW AT THIS POINT (W311=2)}
or THIS IS NOT A REINTERVIEW R (Z076=1)
or R IS {NOT WORKING FOR SOMEONE ELSE
    and NOT SELF-EMPLOYED} (J021 {NOT 1 and NOT 2})}
or R IS NOT INCLUDED IN AT LEAST ONE PENSION PLAN ON CURRENT
    JOB ({{J269 and J335} NOT >0
    and {{J270 and J336} {NOT 1 and NOT 3}})
    or R IS A GOVERNMENT EMPLOYEE (J720=1),
GO TO END OF PENSION DOCUMENTS REQUEST (PENSION DOCS REQUEST)
SECTION
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V321

A very important part of our research is learning about participants' pension and retirement plans. In addition to asking the earlier questions about your plans, we would like to ask you for a copy of the documents that describe the retirement plans you have [through your business/at your current job].

We want to assure you that all of your information will be kept strictly confidential. Neither you nor your employer will be identified in any of our research, and your information will not be shared with anyone outside the study. The information from the documents will be used for statistical purposes only and ultimately used in policy-making for older people in America.

We know that it may take some time for you to obtain, copy, and send us the documents we are requesting. Since the information provided by people like you is extremely valuable to our research, we will send you a check for \$50.00 when we receive the documents.

[IWER: PRESS 1 TO CONTINUE]

1. CONTINUE

9. RF

GO TO END OF PENSION
DOCS REQUEST SECTION

V324

IF R IS SELF-EMPLOYED (J021=2):

A 'Summary Plan Description' is a public document describing the details of pension or retirement plans offered to employees. It describes such things as the type of your pension plan, the eligibility rules, amount of contribution by you and your business, vesting period, and the rules about benefits when you retire.

OTHERWISE, IF R WORKS FOR SOMEONE ELSE (J021=1)

A 'Summary Plan Description' is a public document describing the details of pension or retirement plans offered to employees. It is available through your employer or pension provider and you are entitled to a copy of this document by law. It describes such things as the type of your pension plan, the eligibility rules, amount of contribution by you and your employer, vesting period, and amount of benefits at your expected age of retirement.

IF R HAS ONLY ONE PENSION PLAN ({J269 or J270 or J335 or J336}=1):

Do you have a recent copy of this document for the plan you have through your [business/employer]?

OTHERWISE:

Do you have a recent copy of this document for any of the plans you have through your [business/employer]?

DEFINITION: A •PENSION PROVIDER• MAY BE AN EMPLOYER, A PENSION PLAN ADMINISTRATOR, A FIRM MANAGING PENSIONS OR RETIREMENT ACCOUNTS, A UNION, OR AN EMPLOYER'S ASSOCIATION.



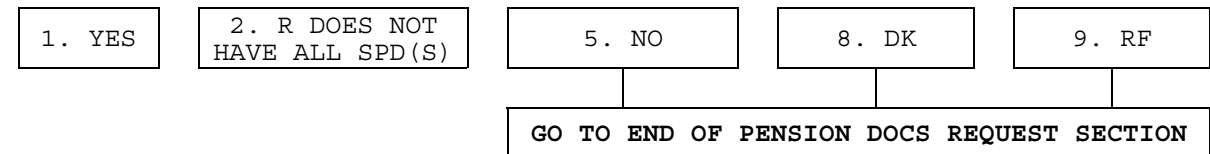
V325

IF R HAS COPY OF DOCUMENT(S) (V324=1):

Will you send us a copy of the most recent Summary Plan Description(s) you have?

OTHERWISE:

Will you check your files and send us a copy of the most recent Summary Plan Description(s) you have?



V326 BRANCHPOINT: IF R {HAS ONLY ONE PENSION PLAN ({J269 or J270 or J335 or J336}=1) and AGREED TO SEND SPD ({V324 and V325}=1)}, GO TO V327

V326

IF R HAS MORE THAN ONE PLAN ON CURRENT JOB ({{J269 or J335}={12-8}} or {{J269 or J270}=3}}):

If you find you do not have ~~all~~ of your recent Summary Plan Descriptions on hand, will you request a copy of your Summary Plan Description(s) from your employer or pension provider?

OTHERWISE:

Will you request a copy of your Summary Plan Description(s) from your employer or pension provider?

IF R {IS EMPLOYED BY SOMEONE ELSE (J021=1) and IS A UNION MEMBER (J266=1)}:

You will need to contact the Human Resources Department or Benefits Office of your employer (or your union office).

IF R {IS EMPLOYED BY SOMEONE ELSE (J021=1) and IS NOT A UNION MEMBER (J266 NOT 1)}:

You will need to contact the Human Resources Department or Benefits Office of your employer.

READ TO ALL Rs:

(I have here a prepared letter to sign and send if you wish.)

[IWER: GIVE EMPLOYER LETTER TO R IF IT IS DESIRED]

1. YES	5. NO	8. DK	9. RF
GO TO END OF PENSION DOCS REQUEST SECTION			

V327 BRANCHPOINT: IF R {HAS AGREED TO SEND SPD(S) (V325=1) or TO ASK EMPLOYER FOR IT/THEM (V326=1)}, CONTINUE ON TO V327

OTHERWISE, GO TO END OF PENSION DOCS REQUEST SECTION

V327

Here is a self-addressed stamped envelope for sending a copy of your documents to our main office.

This identification number will be used for linking what you send us to your mailing information so that we can send a payment to you for your time and trouble.

[IWER: RECORD THE FOLLOWING LOGGING ID:

R's LOGGING ID NUMBER FOR MAILED DOCUMENTS (per X081)

ON THE SELF-ADDRESSED STAMPED MAILING ENVELOPE AND ON THE INSTRUCTION SHEET LEFT WITH THE R.]

END OF PENSION DOCUMENTS REQUEST

GO TO •COMPLETE INTERVIEW• SCREEN AND THEN ON TO THUMBNAIL QUESTIONS