****

*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 *

R IS **MALE** (X060=1);
   R IS **FEMALE** (X060=2)

R WAS **MARRIED AT HH's LAST IW** (X066=1);
   R WAS **PARTNERED AT HH's LAST IW** (X066=3);
   R WAS **SINGLE AT HH's LAST IW** (X066=6);
   R WAS **NOT COUPLED AT HH's LAST IW** (X066 {NOT 1 *and* NOT 3})

THIS IS A **SELF INTERVIEW** (A009=1);
   THIS IS A **PROXY INTERVIEW** (A009={2 *or* 3}) *or* (A009 NOT 1);
   PROXY REPORTER IS **SPOUSE/PARTNER** (A009=2);
   PROXY REPORTER IS **NOT SPOUSE/PARTNER** (A009=3)

R HAS **SAME SPOUSE/PARTNER** AS AT R's LAST IW (A020=1);
   R's FORMER **PARTNER** IS **NOW** HIS/HER **SPOUSE** (A020=3);
   R's FORMER **SPOUSE** IS **NOW** HIS/HER **PARTNER** (A020=4);
   R DOES **NOT** HAVE **SAME SPOUSE/PARTNER** AS AT R's LAST IW (A020=5)

R's **LAST IW SPOUSE/PARTNER IS STILL ALIVE** (A023=1);
   R's **LAST IW SPOUSE/PARTNER IS NOT ALIVE** (A023=5)

R AND R's LAST IW SPOUSE/PARTNER **WERE COUPLED WHEN R's LAST IW SPOUSE/PARTNER DIED** (A202=1);
   R AND R's LAST IW SPOUSE/PARTNER **WERE NOT COUPLED WHEN R's LAST IW SPOUSE/PARTNER DIED** (A202=5)

R **DIVORCED SINCE R's LAST IW MONTH** (per Z092), **YEAR** (per Z093) (B058=1);
   R **BECAME WIDOWED SINCE R's LAST IW MONTH** (per Z092), **YEAR** (per Z093) (B058=2);
   R **DID NOT DIVORCE OR BECOME WIDOWED SINCE R's LAST IW MONTH** (per Z092), **YEAR** (per Z093) (B058=5)

----

* 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.

****

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):
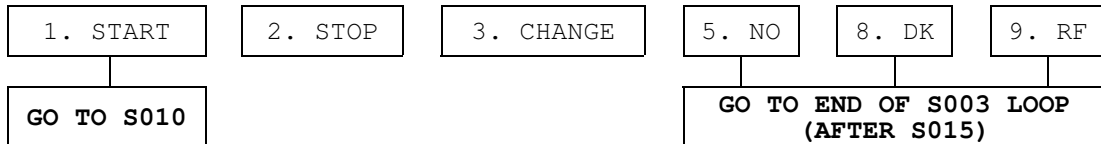Financial situations may change with divorce.

Thinking back to the time surrounding 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 the time surrounding your separation, did any
income from Social Security start, stop or change because of it?
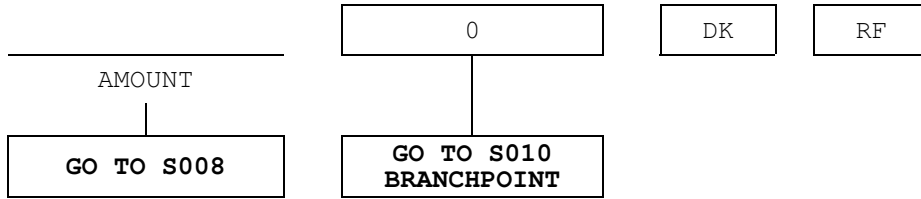
FOR SECOND, THIRD AND FOURTH LOOPS:
Did any income from
LOOP 2: Supplemental Security Income
LOOP 3: Veterans benefits
LOOP 4: other retirement pensions or annuities
start, stop or change because of [[his/her] death/the divorce/the
separation]?

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]

	0	DK	RF

```
_____                    _____
       AMOUNT

┌──────────────────┐              ┌──────────────────┐
│    GO TO S008    │              │   GO TO S010     │
│                  │              │   BRANCHPOINT    │
└──────────────────┘              └──────────────────┘
```

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

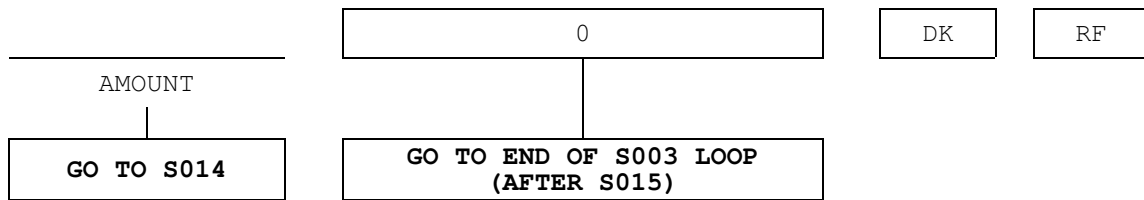| 6. YEAR	7. OTHER (SPECIFY)	8. DK	9. RF
	S009		

> **S010 BRANCHPOINT:** IF BENEFIT INCOME 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]

_____	0	DK	RF

AMOUNT

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) _____ S015	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.***

S016
Did your earnings from your own 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			**GO TO S037**		

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]

_____	0	DK	RF
AMOUNT			
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]

    _____ | DK | | RF |
                HOURS

        | 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]

    _____ | 0 | | DK | | RF |
            AMOUNT

    | 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]

_____ | 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) _____ S039	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]

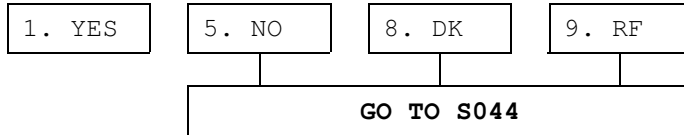| DK	RF

_____
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

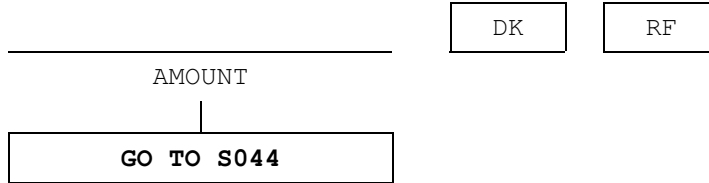Did you receive a lump-sum pension settlement?

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

GO TO S044

S043

How much did it amount to?

[IWER: DO NOT PROBE DK/RF]

_____ | DK | | RF |

AMOUNT

GO TO S044

S064–S066 (Tag# = S043.3, S043.5, S043.7) Unfolding Sequence:
Question text: Did it amount to a total of less than $___ , more than
$___ , or what?

PROCEDURE: 2Up1Down
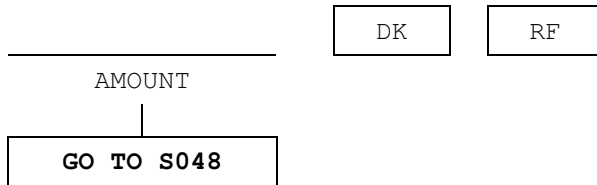BREAKPOINTS: $2,000, **$8,000**, $30,000, $45,000
ENTRY POINT: $8,000

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]

_____ | DK | | RF |

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) _____ S049	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
	GO TO S052			**GO TO S052**	

S051/S070
   (Which child is that?)

   [IWER: CHOOSE ALL THAT APPLY]

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

CHILD NAME(S)   [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. TO 42. *CHILD NAME(S)*
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. DECEASED CHILD
93. ALL CHILDREN
98. DK
99. RF

   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) _____ S053	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?

_____ | DK | | RF |

CAUSE OF DEATH

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 BRANCHPOINT: IF R's SPOUSE/PARTNER FROM PREVIOUS WAVE IS NO LONGER LIVING
(A023=5) *or* R IS WIDOWED (B058=2), GO TO S058 BRANCHPOINT

S057

Did you receive any money or property from your former
[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)

S058

All in all, what were your expenses associated with the
[divorce/separation], that is, legal fees and costs?

[IWER: DO NOT PROBE DK/RF]

_____ | DK | | RF |
        AMOUNT

GO TO S059

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?

| 1. NEVER | 2. A FEW TIMES | 3. MOST OR ALL OF THE TIME | 4. THE SECTION WAS DONE BY A PROXY REPORTER |

GO TO SECTION T