
**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 NEW COHORT IW (X024 NOT 1)

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

R WAS **MARRIED AT HH'S LAST IW** (Preload_X065=1);
R WAS **PARTNERED AT HH'S LAST IW** (Preload_X065=3);
R WAS **SINGLE AT HH'S LAST IW** (Preload_X065=6);
R WAS **NOT COUPLED AT HH'S LAST IW** (Preload_X065 {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.

<p>S003 BRANCHPOINT: IF THIS IS A NEW COHORT IW (X024 NOT 1), GO TO SECTION T</p> <p>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</p> <p>OTHERWISE, GO TO SECTION T</p>
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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 (Preload_X065=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 (Preload_X065=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:

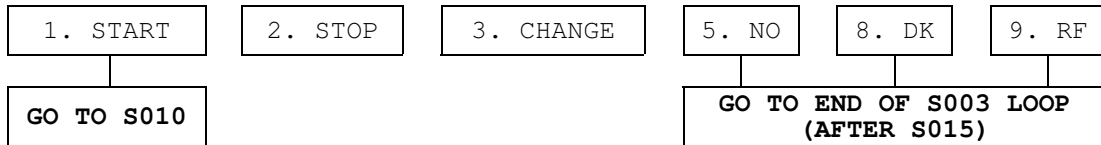
Did any income from

LOOP 2: Supplemental Security Income

LOOP 3: Veterans benefits

LOOP 4: other retirement pensions or annuities

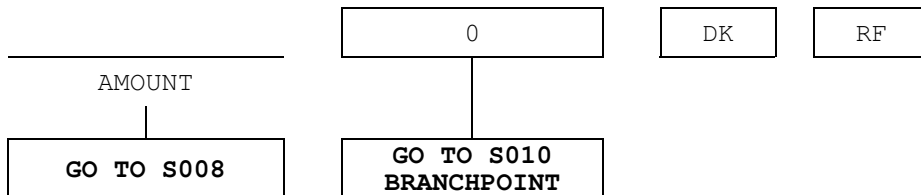
start, stop or change because of [[his/her] death/the divorce/the separation]?



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:

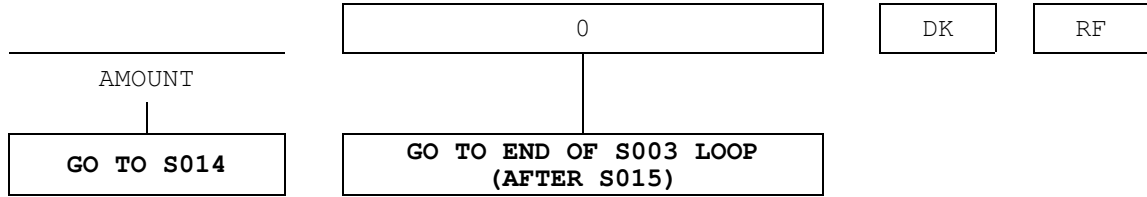
2. WEEK	3. EVERY TWO WEEKS/BI-WEEKLY	4. MONTH
6. YEAR	7. OTHER (SPECIFY) S009	8. DK
		9. RF

S010 BRANCHPOINT: IF 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]



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

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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

S015

END OF S003 LOOP: REPEAT QUESTIONS S003 THROUGH S015 FOR ALL FOUR INCOME TYPES. THEN CONTINUE ON TO S016.

S016

Did your work hours, or earnings from your own work, 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]

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) S022	8. DK
		9. RF

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) S032	8. DK
		9. RF

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

DK	RF
----	----

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
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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

S039

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]

AMOUNT

DK	RF
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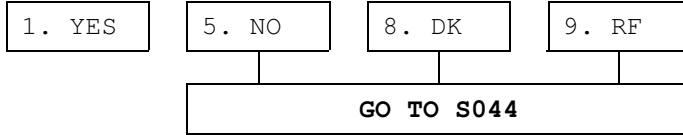
GO TO S042

S061-S063 (Tag# = S041.3, S041.5, S041.7) Unfolding Sequence:
 Question text: Did 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

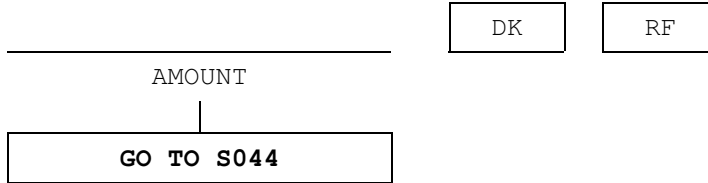
Did you receive a lump-sum pension settlement?



S043

How much did it amount to?

[IWER: DO NOT PROBE DK/RF]



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

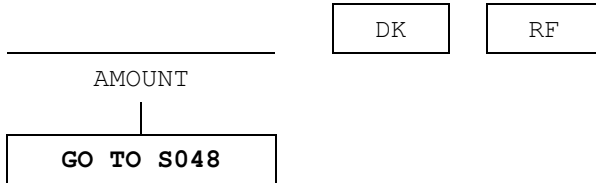
ENTRY POINT: \$8,000

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]



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?

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[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 52.	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
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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 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]

AMOUNT

|

DK	RF
----	----

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
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GO TO SECTION T