

**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 **NEW SPOUSE/PARTNER** OF A REINTERVIEW R (Z076=0);
 THIS IS A **NEVER INTERVIEWED R** or A **NEW INTERVIEW R** (Z076=5)

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

R IS FROM {**AHEAD or CODA**} **COHORT** (X023={1 or 2})

R IS **MARRIED** (X065=1);
 R IS **PARTNERED** (X065=3);
 R IS **SINGLE** (X065=6)

R IS **WORKING FOR PAY** (J020=1);
 R IS **NOT CURRENTLY WORKING** (J020=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.

J964

IF R HAS NEVER WORKED FOR PAY (K003=[5 or DK or RF]):
Next I have a few questions about Social Security.

OTHERWISE:
Next I have a few questions about retirement and Social Security.

1. CONTINUE

J564 BRANCHPOINT: IF R NEVER WORKED FOR PAY (K003={5 or DK or RF}), GO TO J478

IF R IS IN NURSING HOME (A028=1) and HAS NO OTHER RESIDENCE OUTSIDE NURSING HOME (A070=5) and DID NOT REPORT THAT IS CURRENTLY WORKING (J020 NOT 1), GO TO J578

IF R REPORTED {IN CURRENT IW and IN THE LAST TWO WAVES} THAT WAS NOT WORKING (J705=1), GO TO J578

IF R {REPORTED IN CURRENT IW THAT HAD MARGINAL EMPLOYMENT and REPORTED IN LAST IW THAT HAD {MARGINAL EMPLOYMENT OR NONE}} (J703=1), GO TO J578

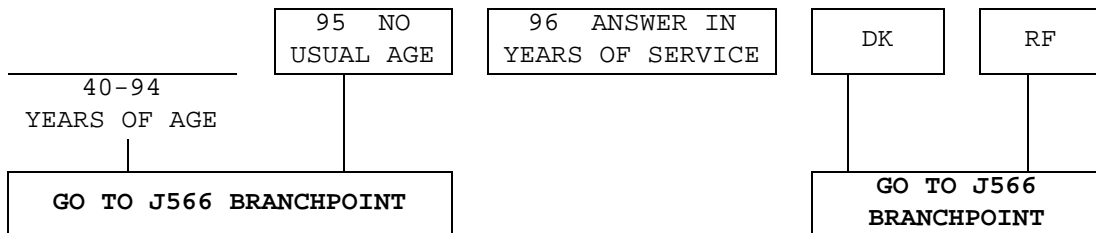
IF THIS IS A PROXY INTERVIEW and R IS NOT CURRENTLY WORKING (J020 NOT 1), GO TO J613 BRANCHPOINT

IF R IS NOT CURRENTLY WORKING (J020 NOT 1), GO TO J578

*-----Retirement Plans/Retirement Satisfaction-----
(J564-J594)

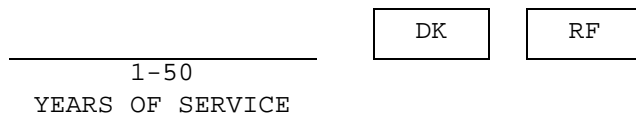
J564

On your main job, what is the usual retirement age for people who work with you or have the same kind of job?



J565

ENTER USUAL NUMBER OF YEARS OF SERVICE:



J566 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW, GO TO J613 BRANCHPOINT

J566

When you retire, do you plan to stop working altogether or reduce work hours at a particular date or age, have you not given it much thought, or what?

J570

At what age do you think you will stop working?

25-94 YEARS OF AGE

_____	95 NEVER	96 YEAR GIVEN	DK	RF
YEARS OF AGE				
GO TO J572 BRANCHPOINT			GO TO J572 BRANCHPOINT	

J571

ENTER YEAR THINKING TO STOP WORKING:

_____	DK	RF
2014-2034		
YEAR THINKING TO STOP WORKING		

J572 BRANCHPOINT: IF R DID NOT SAY S/HE PLANS TO REDUCE WORK HOURS (J566 NOT 5), GO TO J574 BRANCHPOINT

J572

At what age do you plan to start working fewer hours?

25-94 YEARS OF AGE

_____	95 NEVER	96 YEAR GIVEN	DK	RF
YEARS OF AGE				
GO TO J574 BRANCHPOINT			GO TO J574 BRANCHPOINT	

J573

ENTER YEAR PLANNING TO START WORKING FEWER HOURS:

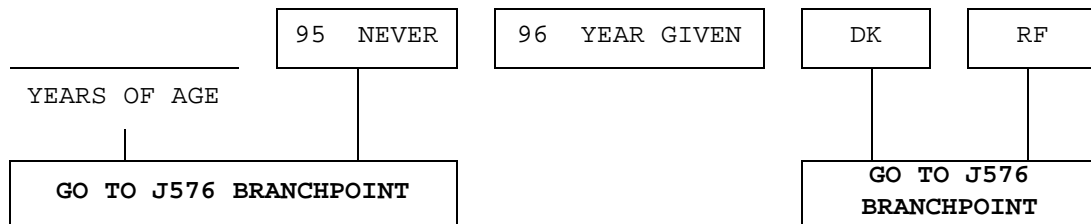
_____	DK	RF
2014-2034		
YEAR PLANNING TO START WORKING FEWER HOURS		

J574 BRANCHPOINT: IF R DID NOT SAY S/HE PLANS TO CHANGE KIND OF WORK
(J566 NOT 6), GO TO J576 BRANCHPOINT

J574

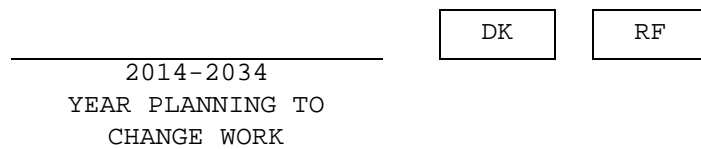
At what age do you plan to change the kind of work you do?

25-94 YEARS OF AGE



J575

ENTER YEAR PLANNING TO CHANGE WORK:

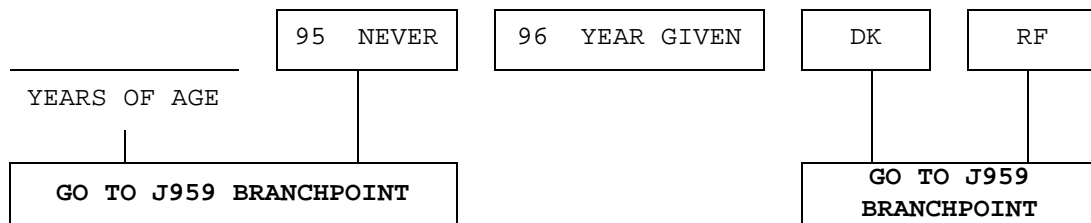


J576 BRANCHPOINT: IF R DOES NOT PLAN TO WORK FOR HIM/HERSELF
(J566 NOT 7), GO TO J959 BRANCHPOINT

J576

At what age do you plan to start working for yourself?

25-94 YEARS OF AGE



J577

ENTER YEAR PLANNING TO START SELF-EMPLOYMENT:

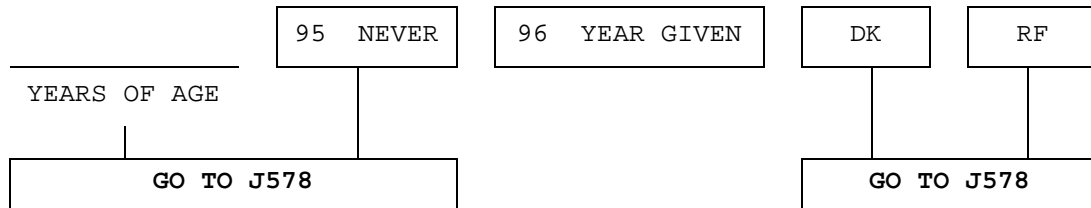


2014-2034
YEAR STARTING SELF
EMPLOYMENT

J959 BRANCHPOINT: IF R REPORTED {PLAN TO STOP WORK ALTOGETHER, NEVER STOP WORKING, NOT GIVEN MUCH THOUGHT, NO CURRENT PLANS, CONTINUE AS IS, WORK UNTIL MY HEALTH FAILS, REFUSE} (J566={1 or 2 or 3 or 4 or 8 or 99}) or REPORTED "NEVER" AT ANY FOLLOW-UPS (J572 or J574 or J576 = 95), GO TO J578

J959

At what age do you think you will stop working permanently?
25-94 YEARS OF AGE



J960

ENTER YEAR PLANNING TO STOP WORKING PERMANENTLY:

	DK	RF
_____ 2014-2034 YEAR PLANNING TO STOP WORKING PERMANENTLY		

J578

We are interested in what people think about retirement, whether they themselves are retired or not.

At this time do you consider yourself partly retired, completely retired, or not retired at all?

1. COMPLETELY RETIRED	3. PARTLY RETIRED	5. NOT RETIRED AT ALL
		 GO TO J709 (AFTER J581)
7. QUESTION NOT RELEVANT TO R, DOESN'T WORK FOR PAY OR IS HOMEMAKER, ETC.	8. DK	9. RF
 GO TO J613 BRANCHPOINT		

J580 BRANCHPOINT: IF R IS COMPLETELY RETIRED NOW (J578=1) and {WAS COMPLETELY RETIRED AT R's LAST IW (Z134=1) or {R WAS RETIRED and WE DON'T KNOW WHETHER IT WAS COMPLETELY (Z124=1 and {Z134 = EMPTY}})}, GO TO J709 (AFTER J581)

IF R IS PARTLY RETIRED (J578=3) and WAS PARTLY RETIRED AT R's LAST IW (Z134=3) or {R WAS RETIRED and WE DON'T KNOW WHETHER IT WAS COMPLETELY (Z124=1 and {Z134 = EMPTY}})}, GO TO J709 (AFTER J581)

IF R GAVE YEAR S/HE RETIRED AT J018, GO TO J709 (AFTER J581)

J580

In what month and year did you [partly/completely] retire?

[IWER: MONTH ENTERED MUST BE BEFORE CURRENT IW MONTH, YEAR]

J580

MONTH:

1. JAN	2. FEB	3. MAR	4. APR	5. MAY	6. JUN	7. JUL
8. AUG	9. SEP	10. OCT	11. NOV	12. DEC	98. DK	99. RF

DK	RF
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J581

YEAR

J709 (Tag#=J581.1)

IF R IS PARTLY RETIRED OR IS NOT RETIRED (J578={3 or 5}):

How much have you thought about retirement — a lot, some, a little, or hardly at all?

IF R IS COMPLETELY RETIRED (J578=1):

Before you retired, how much did you think about retirement — a lot, some, a little, or hardly at all?

1. A LOT	2. SOME	3. A LITTLE	4. HARDLY AT ALL	8. DK	9. RF
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J583 BRANCHPOINT: IF R IS IN NURSING HOME (A028=1) *and* HAS NO OTHER RESIDENCE OUTSIDE NURSING HOME (A070=5) *and* DID NOT REPORT THAT IS CURRENTLY WORKING (J020 NOT 1), GO TO J613 BRANCHPOINT

IF R REPORTED {IN CURRENT IW *and* IN THE LAST TWO WAVES} THAT WAS NOT WORKING (J705=1) *and* R IS NOT COMPLETELY RETIRED (J578 NOT 1), GO TO J613 BRANCHPOINT

IF R REPORTED {IN CURRENT IW *and* IN THE LAST TWO WAVES} THAT WAS NOT WORKING (J705=1), GO TO J584 BRANCHPOINT

IF R {REPORTED IN CURRENT IW THAT HAD MARGINAL EMPLOYMENT *and* REPORTED IN LAST IW THAT HAD {MARGINAL EMPLOYMENT OR NONE}} (J703=1), GO TO J613 BRANCHPOINT

IF R IS NOT RETIRED AT ALL (J578=5), GO TO J589 BRANCHPOINT

IF R IS PARTLY RETIRED (J578=3) *and* {WAS PARTLY RETIRED AT R'S LAST IW (Z134=3) *or* {R WAS RETIRED *and* WE DON'T KNOW WHETHER IT WAS PARTLY (Z124=1 *and* {Z134 = EMPTY})}}, GO TO J589 BRANCHPOINT

IF R IS COMPLETELY RETIRED NOW (J578=1) *and* {WAS COMPLETELY RETIRED AT R'S LAST IW (Z134=1) *or* {R WAS RETIRED *and* WE DON'T KNOW WHETHER IT WAS COMPLETELY (Z124=1 *and* {Z134 = EMPTY})}}, GO TO J584

J583

Thinking back to the time you [partly/completely] retired, was that something you wanted to do or something you felt you were forced into?

- | | | | | |
|--------------------|-------------------|--------------------------------|-------|-------|
| 1. WANTED
TO DO | 2. FORCED
INTO | 3. PART WANTED,
PART FORCED | 8. DK | 9. RF |
|--------------------|-------------------|--------------------------------|-------|-------|

J584 BRANCHPOINT: IF R IS NOT COMPLETELY RETIRED (J578 NOT 1), GO TO J589 BRANCHPOINT

J584

All in all, would you say that your retirement has turned out to be very satisfying, moderately satisfying, or not at all satisfying?

- | | | | | |
|-----------------------|-----------------------------|--------------------------------|-------|-------|
| 1. VERY
SATISFYING | 2. MODERATELY
SATISFYING | 3. NOT AT
ALL
SATISFYING | 8. DK | 9. RF |
|-----------------------|-----------------------------|--------------------------------|-------|-------|

J585 BRANCHPOINT: IF R REPORTED {IN CURRENT IW *and* IN THE LAST TWO WAVES} THAT WAS NOT WORKING (J705=1), GO TO J613 BRANCHPOINT

J585

Thinking about your retirement years compared to the years just before you retired, would you say the retirement years have been better, about the same, or not as good?

1. BETTER	3. ABOUT THE SAME	5. NOT AS GOOD	6. RETIRED LESS THAN 1 YEAR AGO.	8. DK	9. RF
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J586 BRANCHPOINT: IF R WAS COMPLETELY RETIRED AT R's LAST IW (Z134=1) or {R WAS RETIRED and WE DON'T KNOW WHETHER IT WAS COMPLETELY (Z124=1 and {Z134 = EMPTY})}, GO TO J613 BRANCHPOINT

J586

I'm going to read you a list of reasons why some people retire. Please tell me whether, for you, these were very important reasons for retirement, moderately important, somewhat important, or not important at all.

1. CONTINUE	DK	RF
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J588	1. VERY IMPORTANT	2. MODERATELY IMPORTANT	3. SOMEWHAT IMPORTANT	4. NOT IMPORTANT AT ALL	8. DK	9. RF
J588_1 Poor health. (Was this a very important reason for your retirement, a moderately important reason, somewhat important, or not important at all?)						
J588_2 Wanted to do other things. (Was this a very important reason for your retirement, a moderately important reason, somewhat important, or not important at all?)						

<p>J588_3</p> <p>Didn't like the work.</p> <p>(Was this a very important reason for your retirement, a moderately important reason, somewhat important, or not important at all?)</p>						
<p>J588_4</p> <p>Wanted to spend more time with my family.</p> <p>(Was this a very important reason for your retirement, a moderately important reason, somewhat important, or not important at all?)</p>						

J589 BRANCHPOINT: IF THIS IS A REINTERVIEW R, GO TO J613 BRANCHPOINT

J589

Now I'm going to read you a list of things that some people say are good about retirement.

IF R IS COMPLETELY RETIRED (J578=1):

For each one, please tell me if, during your retirement, it has been very important, moderately important, somewhat important, or not important at all.

OTHERWISE:

For each one, please tell me if, for you, they are very important, moderately important, somewhat important, or not important at all.

1. CONTINUE

DK

RF

J591	1. VERY IMPORTANT	2. MODERATELY IMPORTANT	3. SOMEWHAT IMPORTANT	4. NOT IMPORTANT AT ALL	8. DK	9. RF
<p>J591_1 Being your own boss. ([Has this been/Is this] very important, moderately important, somewhat important, or not important at all?)</p>						
<p>J591_2 Being able to take it easy. ([Has this been/Is this]) very important, moderately important, somewhat important, or not important at all?)</p>						
<p>J591_3 Having the chance to travel. ([Has this been/Is this] very important, moderately important, somewhat important, or not important at all?)</p>						

J592

Now for things that some people say are bad about retirement.

IF R IS COMPLETELY RETIRED (J578=1):

Please tell me if, during your retirement, they have bothered you a lot, somewhat, a little, or not at all.

OTHERWISE:

Please tell me if they worry you a lot, somewhat, a little, or not at all.

1. CONTINUE	DK	RF
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NOTE: EACH OF THE THREE WORRIES IN THE TABLE BELOW HAS THE FOLLOWING RETIREMENT CONDITIONS WITH QUESTION FORMS.

IF R IS COMPLETELY RETIRED (J578=1):

Does this bother you a lot, somewhat, a little, or not at all?

IF R IS PARTLY RETIRED (J578=2):

Does this worry you a lot, somewhat, a little, or not at all?

OTHERWISE (J578 {NOT 1 and NOT 2}):

Does this worry you a lot, somewhat, a little, or not at all?

J594	1. A LOT	2. SOMEWHAT	3. A LITTLE	4. NOT AT ALL	7. DIDN'T WORK	8. DK	9. RF
J594_1 Not doing anything productive or useful. (Does this [bother/worry] you a lot, somewhat, a little, or not at all?)							
J594_2 Illness or disability. (Does this [bother/worry] you a lot, somewhat, a little, or not at all?)							

<p>J594_3</p> <p>Not having enough income to get by. (Does this [bother/worry] you a lot, somewhat, a little, or not at all?)</p>						
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J613 BRANCHPOINT: IF THIS IS A NEW INTERVIEW R (Z076 NOT 1), GO TO L040 BRANCHPOINT

IF R DID NOT REPORT THAT IS CURRENTLY WORKING (J020={5 or DK or RF}) and DID NOT REPORT AT R's LAST IW THAT WAS WORKING FOR PAY (Z123 NOT 1) and DID NOT REPORT THAT HAS WORKED FOR PAY BETWEEN {LEAVING LAST IW EMPLOYER AND {THE PRESENT OR START OF CURRENT EMPLOYMENT}} (J596={5 or DK or RF}), GO TO L040 BRANCHPOINT

IF R {REPORTED IN CURRENT IW THAT HAD MARGINAL EMPLOYMENT and REPORTED IN LAST IW THAT HAD {MARGINAL EMPLOYMENT OR NONE}} (J703=1), GO TO L040 BRANCHPOINT

IF R IS SELF-EMPLOYED NOW (J021=2) and WAS SELF-EMPLOYED AT R's LAST IW (Z136=2), GO TO L040 BRANCHPOINT

IF R WAS SELF-EMPLOYED AT R's LAST IW (Z136=2) and DID NOT REPORT THAT IS CURRENTLY WORKING (J020 NOT 1) and DID NOT REPORT THAT HAS WORKED FOR PAY BETWEEN {LAST IW AND START OF CURRENT EMPLOYMENT} (J596 NOT 1), GO TO L040 BRANCHPOINT

IF R DID NOT REPORT AT R's LAST IW THAT WAS WORKING FOR PAY (Z123 NOT 1) and IS SELF-EMPLOYED NOW (J021=2) and DID NOT REPORT THAT HAS WORKED FOR PAY BETWEEN {LAST IW AND START OF CURRENT EMPLOYMENT} (J596 NOT 1), GO TO L040 BRANCHPOINT

*-----Early Out Retirement Incentives-----
(J613-J650)

J613

Employers sometimes encourage older workers to leave a firm at a particular time by offering a special financial incentive, like a cash bonus or improved pension benefits. These are often called 'early retirement windows.'

Have you been offered such an early retirement window at any time since R's LAST IW MONTH, YEAR?

1. YES	5. NO	8. DK	9. RF
GO TO L040 BRANCHPOINT			

J614

How many of these special incentive offers have you received [since R's LAST IW MONTH, YEAR/in the last two years]?

SPECIAL INCENTIVES

0	DK	RF
GO TO L040 BRANCHPOINT		

BEGINNING OF J616 LOOP: QUESTIONS J616 THROUGH J646 ARE REPEATED FOR THE FIRST AND LAST SPECIAL INCENTIVES THE R RECEIVED.

J616

In what month and year was the [first/second] special incentive offered?

[IWER: MONTH ENTERED MUST BE BETWEEN [NOV. YEAR 2 YEARS AGO/REINTERVIEW R's LAST IW MONTH, YEAR] AND CURRENT IW MONTH, YEAR]

J616

MONTH:

1. JAN	2. FEB	3. MAR	4. APR	5. MAY	6. JUN	7. JUL
8. AUG	9. SEP	10. OCT	11. NOV	12. DEC	98. DK	99. RF

DK	RF
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_____ J617
YEAR

J619 BRANCHPOINT: IF R IS STILL WORKING FOR LAST IW EMPLOYER (J045={1 or 3}), GO TO J621

J619

Which employer were you working for at the time?

[IWER: SELECT EMPLOYER FROM LIST BELOW]

[IWER: IF EMPLOYER NOT LISTED, SELECT OTHER, SPECIFY AND ENTER FULL NAME OF EMPLOYER ON NEXT SCREEN]

1. LAST WAVE EMPLOYER NAME (per A508)	2. CURRENT EMPLOYER NAME (per JW158)	7. OTHER (SPECIFY) _____ J620	8. DK	9. RF
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J621

Was the special incentive a cash bonus, improved pension benefits or what?

[IWER: CHOOSE ALL THAT APPLY]

1. CASH BONUS	2. IMPROVED PENSION BENEFITS	3. PERMANENT MEDICAL INSURANCE	4. TEMPORARY MEDICAL INSURANCE
5. TEMPORARY CASH BENEFIT	6. ADDITIONAL YEARS OF SERVICE CREDITED	7. OTHER (SPECIFY) _____	8. DK
		J622	9. RF

J623 BRANCHPOINT: IF R's OFFER DID NOT INCLUDE A CASH BONUS (J621 NOT 1), GO TO J627 BRANCHPOINT

J623

How much did the cash bonus offer amount to?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK RF

GO TO J627
BRANCHPOINT

J624-J626 Unfolding Sequence

Question text: Did it amount to less than \$____ , more than \$____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: \$15,000, \$25,000, \$50,000, \$75,000

RANDOM ENTRY POINTS: \$25,000, \$50,000

ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X506

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

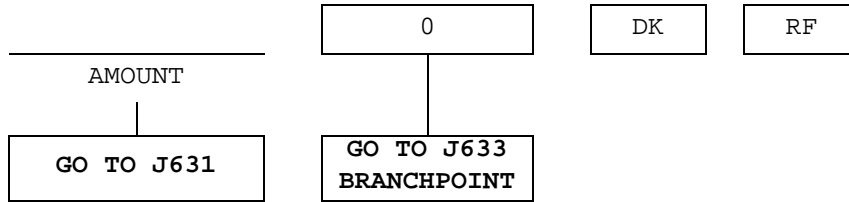
J627 BRANCHPOINT: IF R's OFFER DID NOT INCLUDE IMPROVED PENSION BENEFIT (J621 NOT 2), GO TO J633 BRANCHPOINT

J627

How much did the extra pension benefit offer amount to?

[IWER: DO NOT PROBE DK/RF]

[IWER: IF AMOUNT PER HOUR, ENTER BOTH DOLLARS AND CENTS]



J628-J630 unfolding sequence

Question text: Did it amount to less than \$____ , more than \$____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: \$3,000, \$5,000, \$12,000, \$36,000

RANDOM ENTRY POINTS: \$5,000, \$12,000

ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X507

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

J631 BRANCHPOINT: GO TO J633 BRANCHPOINT

J631

[IWER: PROBE IF NECESSARY]

Was that per week, month, year, or a lump sum?

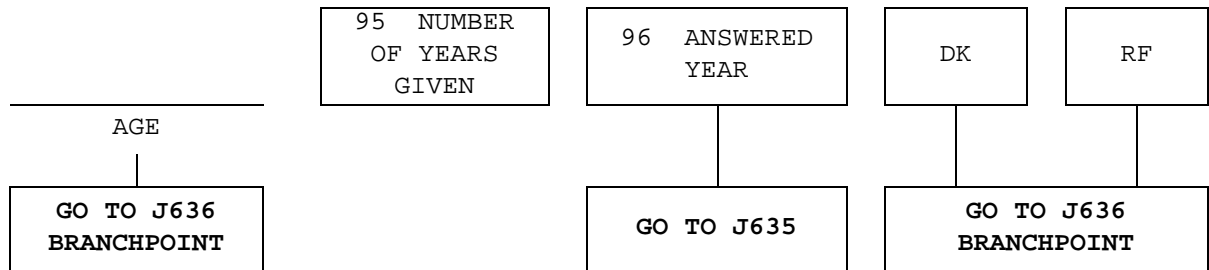
PER:

2. WEEK	4. MONTH	6. YEAR	95. LUMP SUM
97. OTHER (SPECIFY) _____ J632	98. DK	99. RF	

J633 BRANCHPOINT: IF R's OFFER DID NOT INCLUDE TEMPORARY MEDICAL INSURANCE (J621 NOT 4), GO TO J636 BRANCHPOINT

J633

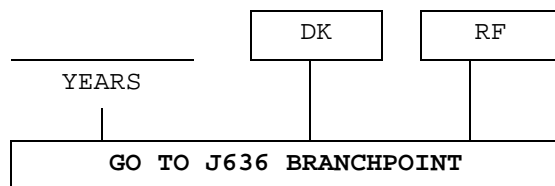
Until what age was the temporary medical insurance offered?



J634

[IWER: PROBE IF NECESSARY]

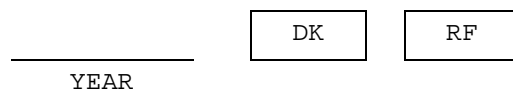
For how many years was the temporary medical insurance offered?



J635

[IWER: PROBE IF NECESSARY]

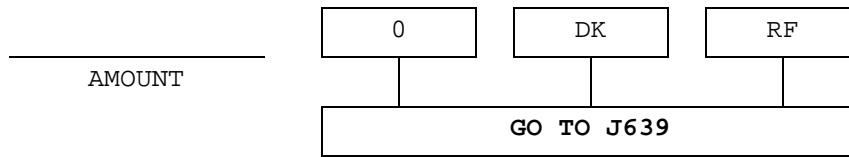
Until which year was the temporary medical insurance offered?



J636 BRANCHPOINT: IF R's OFFER DID NOT INCLUDE TEMPORARY CASH BENEFITS (J621 NOT 5), GO TO J642 BRANCHPOINT

J636

How much did the temporary cash benefits offer amount to?

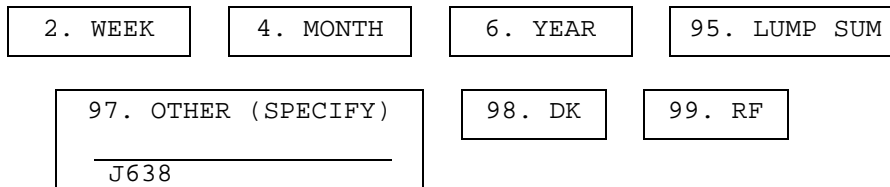


J637

[IWER: PROBE IF NECESSARY]

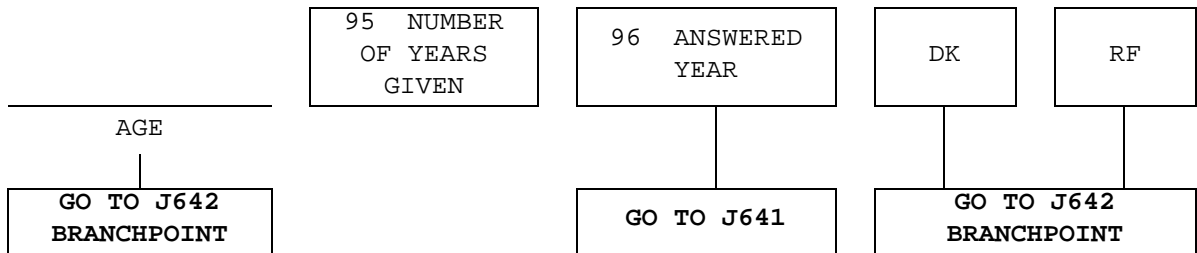
Was that per week, month year, or a lump sum?

PER:



J639

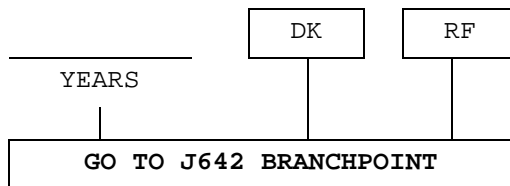
Until what age was the temporary cash benefit offered?



J640

[IWER: PROBE IF NECESSARY]

For how many years was the temporary cash benefit offered?



J641

[IWER: PROBE IF NECESSARY]

Until which year was the temporary cash benefit offered?

YEAR

J642 BRANCHPOINT: IF R'S OFFER DID NOT INCLUDE ADDITIONAL YEARS OF SERVICE CREDIT (J621 NOT 6), GO TO J643 BRANCHPOINT

J642

How many years of service credit were you offered?

YEARS

J643 BRANCHPOINT: IF R'S OFFER DID NOT INCLUDE OTHER INCENTIVES (J621 NOT 7), GO TO J644

J643

IF R MENTIONS OTHER INCENTIVES ONLY (J621=7 ONLY):

Altogether, how much did the incentive offer amount to?

OTHERWISE:

(Not including [the cash bonus, /(and) improved pension benefits, /(and) permanent medical insurance, /(and) temporary medical insurance, /(and) temporary cash benefit, /(and) additional years of service credited,]) what was the value of the other part of the [first/second] incentive offer?

NOTE: "and" IS INSERTED BETWEEN THE LAST ITEM ON THE LIST AND ITS PREDECESSOR.

AMOUNT

NOTE: ALL TYPES OF INCENTIVES SELECTED AT J621 ARE INCLUDED IN THE QUESTION TEXT.

J644

Did you accept the incentive and leave that employer?

1. YES	5. NO	8. DK	9. RF
GO TO J646			

J645

Was the special incentive important in your decision, or would you probably have left at about that time anyway?

1. IMPORTANT IN R's DECISION	5. R WOULD HAVE LEFT ANYWAY	8. DK	9. RF
GO TO END OF J616 LOOP (AFTER J646)			

J646

If you had been offered twice as much (to leave) at that time, would you have done so?

1. YES	5. NO	8. DK	9. RF
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****END OF J616 LOOP: REPEAT QUESTIONS J616 THROUGH J646 IF MORE THAN ONE EARLY OUT WINDOW WAS OFFERED. IF NOT, CONTINUE ON TO L040 BRANCHPOINT****

L040 BRANCHPOINT: IF THIS IS A REINTERVIEW R (Z076=1), GO TO J478

IF R IS FROM {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO L110

IF R REPORTED THAT HAS NOT WORKED FOR PAY IN 20 YEARS OR MORE (per K004 or K005), GO TO L110

IF R REFUSED TO SAY WHEN HE/SHE LAST WORKED ({K004 or K005}=RF), GO TO J478

L040

Employers sometimes encourage older workers to leave a firm at a particular time by offering a special financial incentive, like a cash bonus or improved pension benefits. These are often called 'early retirement windows.'

Have you ever been offered such an early retirement window on any job?

1. YES	5. NO	8. DK	9. RF
GO TO L110			

L041

How many times has this happened?

_____	DK	RF
NUMBER OF TIMES	GO TO L110	

BEGINNING OF L043 LOOP: REPEAT L043 THROUGH L063 FOR FIRST AND LAST SPECIAL INCENTIVE THE R RECEIVED.

L043

When was the [first/second] special incentive offered?

_____	DK	RF
YEAR		

L044

Which employer were you working for at the time?

[IWER: ENTER FULL EMPLOYER NAME]

_____	DK	RF
EMPLOYER		

L045

Was the special incentive a cash bonus, improved pension benefits, or what?

[IWER: ENTER ALL THAT APPLY]

1. CASH BONUS	2. IMPROVED PENSION BENEFITS	3. PERMANENT MEDICAL INSURANCE	4. TEMPORARY MEDICAL INSURANCE	
5. TEMPORARY CASH BENEFIT	6. ADDITIONAL YEARS OF SERVICE CREDITED	7. OTHER (SPECIFY) L046	8. DK	9. RF

L047 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED CASH BONUS (L045 NOT 1), GO TO L048 BRANCHPOINT

L047

How much did the cash bonus offer amount to?

[IWER: USE ZERO FOR NONE]

AMOUNT

DK	RF
----	----

L048 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED IMPROVED PENSION BENEFITS (L045 NOT 2), GO TO L051 BRANCHPOINT

L048

How much did the extra pension benefits offer amount to?

_____	0	DK	RF
AMOUNT			
GO TO L051 BRANCHPOINT			

L049

[IWER: PROBE IF NECESSARY]

Was that per week, month, or year?

PER:

2. WEEK	4. MONTH	6. YEAR	95. LUMP SUM
97. OTHER (SPECIFY) _____ L050	98. DK	99. RF	

L051 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED TEMPORARY MEDICAL INSURANCE (L045 NOT 4), GO TO L054 BRANCHPOINT

L051

Until what age was the temporary medical insurance offered?

35 — 80 AGE

_____	95 NUMBER OF YEARS GIVEN	96 ANSWERED YEAR	DK	RF
AGE				
GO TO L054 BRANCHPOINT	GO TO L053		GO TO L054 BRANCHPOINT	

L052

[IWER: PROBE IF NECESSARY:]

For how many years was the temporary medical insurance offered?

1 — 25 YEARS

_____	DK	RF
YEARS		
GO TO L054 BRANCHPOINT		

L053

[IWER: PROBE IF NECESSARY:]

Until which year was the temporary medical insurance offered?

YEAR

DK	RF
----	----

L054 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED A TEMPORARY CASH BENEFIT (L045 NOT 5), GO TO L059 BRANCHPOINT

L054

How much did the temporary cash benefits amount to?

[IWER: USE ZERO FOR NONE]

AMOUNT

0	DK	RF
---	----	----

|

GO TO L056

L055

[IWER: PROBE IF NECESSARY]

Was that per month or year?

PER:

2. WEEK	4. MONTH	6. YEAR	95. LUMP SUM
97. OTHER		98. DK	99. RF

L056

Until what age was the temporary cash benefit offered?

35 — 80 AGE

AGE

95 NUMBER OF YEARS GIVEN	96 ANSWERED YEAR	DK	RF
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|

GO TO L059 BRANCHPOINT	GO TO L058	GO TO L059 BRANCHPOINT
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L057

[IWER: PROBE IF NECESSARY]

For how many years was the temporary cash benefit offered?

0 — 25 YEARS

 YEARS

DK

RF

L058 BRANCHPOINT: IF R DID NOT GIVE THE YEAR THAT WAS OFFERED A TEMPORARY CASH BENEFIT (L056 NOT 96), GO TO L059 BRANCHPOINT

L058

[IWER: PROBE IF NECESSARY]

Until which year was the temporary cash benefit offered?

 YEAR

DK

RF

NOTE: RANGE IS 1900 TO (CURRENT YEAR + 25)

L059 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED ADDITIONAL YEARS OF SERVICE CREDIT (L045 NOT 6), GO TO L060 BRANCHPOINT

L059

How many years of service credit were you offered?

1 — 20 YEARS

 YEARS

DK

RF

L060 BRANCHPOINT: IF R'S OFFER DID NOT INCLUDE OTHER SPECIAL INCENTIVES (L045 NOT 7), GO TO L061

END OF L043 LOOP: REPEAT L043 THROUGH L063 FOR SECOND EARLY-OUT WINDOW, IF APPLICABLE. IF NOT, CONTINUE ON TO L110.

L110

[Not counting your current job,have/Have] you ever worked for a year or more on a job that was not covered by Social Security and for which you did not have to pay Social Security taxes?

1. YES	5. NO	8. DK	9. RF
GO TO J478			

L111

About how many years did you work on jobs that were not covered by Social Security?

YEARS

DK	RF
----	----

-----Social Security-----

J478

Do you currently receive any income from Social Security?

1. YES	5. NO	8. DK	9. RF
GO TO J3 ASSIST		GO TO J3 ASSIST	

J479

Do you expect to receive Social Security benefits at some time in the future?

1. YES	5. NO	8. DK	9. RF
GO TO J3 ASSIST			

J719

Do you expect to get them based on your own work record only, from a current, previous or late spouse's work record only, or both?

1. R'S OWN RECORD ONLY	2. SPOUSE'S RECORD ONLY	3. BOTH RECORDS	8. DK	9. RF
------------------------	-------------------------	-----------------	-------	-------

J480

At what age do you expect to start collecting these benefits?

[IWER: IF R MENTIONS AGE AND SOME NUMBER OF MONTHS, E.G., 59 AND ½, ENTER AGE HERE AND GO TO THE NEXT SCREEN TO ENTER MONTHS]

30-96 AGE

_____	DK	RF
AGE		
	GO TO J487 BRANCHPOINT	

J910

[IWER: IF R REPORTS AGE AND MONTHS, ENTER NUMBER OF MONTHS]

[IWER: IF R DID NOT MENTION MONTHS, PRESS [ENTER] TO CONTINUE]

1-12 NUMBER OF MONTHS

J481

If you start collecting Social Security benefits then, about how much do you expect the payments to be in today's dollars?

[IWER: DO NOT PROBE DK/RF]

_____	0	DK	RF
AMOUNT			
GO TO J485	GO TO J487 BRANCHPOINT		

J482-J484 Unfolding Sequence

Question text: Do you expect it to be less than \$____ per month, more than \$____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: \$250, **\$500**, **\$750**, \$1,750

RANDOM ENTRY POINTS: \$500, \$750

ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X509

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

J485 BRANCHPOINT: GO TO J487 BRANCHPOINT

J485

PER:

2. WEEK

3. EVERY TWO
WEEKS/BI-WEEKLY

4. MONTH

6. YEAR

7. OTHER (SPECIFY)

95. LUMP SUM

98. DK

99. RF

J486

J487 BRANCHPOINT: IF THIS IS A PROXY (A009 NOT 1), GO TO J3 ASSIST

IF R's AGE IS GREATER THAN 62 (A019>62), GO TO J493
BRANCHPOINT

IF R EXPECTS TO START COLLECTING BENEFITS AT AGE 62
(J480=62), GO TO J493 BRANCHPOINT

J487

IF R'S AGE IS LESS THAN 62:

R IS NOT RETIRED *and* NOT A HOMEMAKER (J005 NOT 5 *and* NOT 6):
 If you were to retire at age 62 and collect benefits, what do you think your Social Security benefits would be in today's dollars?

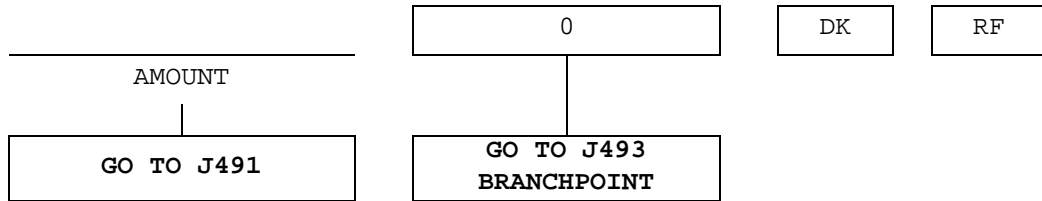
IF R IS RETIRED *or* A HOMEMAKER (J005=5 *or* 6):
 If you were to start collecting benefits at age 62, what do you think your Social Security benefits would be in today's dollars?

IF R'S AGE IS 62:

R IS NOT RETIRED *and* NOT A HOMEMAKER (J005 NOT 5 *and* NOT 6):
 If you were to retire now and collect benefits, what do you think your Social Security benefits would be in today's dollars?

IF R IS RETIRED *or* A HOMEMAKER (J005=5 *or* 6):
 If you were to start collecting benefits now, what do you think your Social Security benefits would be in today's dollars?

[IWER: DO NOT PROBE DK/RF]



J488-J490 Unfolding Sequence

Question text: Do you expect it to be less than \$____ per month, more than \$____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
 BREAKPOINTS: \$500, **\$700**, **\$900**, \$1,200
 RANDOM ENTRY POINTS: \$700, \$900
 ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X510
 ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

J491 BRANCHPOINT: GO TO J493 BRANCHPOINT

J491

PER:

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

J492

J493 BRANCHPOINT: IF {R's AGE IS GREATER THAN *SOCIAL SECURITY NORMAL RETIRMENT AGE*} (A019 > SSNRA), GO TO J3 ASSIST

IF R EXPECTS TO START COLLECTING BENEFITS AT *SOCIAL SECURITY NORMAL RETIREMENT AGE* (J480 = SSNRA), GO TO J3 ASSIST

**SOCIAL SECURITY NORMAL RETIREMENT AGE
(SSNRA)**

YEAR OF BIRTH	SS RETIREMENT AGE
1937 or earlier	65
1938	65 and 2 months
1939	65 and 4 months
1940	65 and 6 months
1941	65 and 8 months
1942	65 and 10 months
1943-1954	66
1955	66 and 2 months
1956	66 and 4 months
1957	66 and 6 months
1958	66 and 8 months
1959	66 and 10 months
1960 and later	67

J493

IF R's AGE IS LESS THAN SOCIAL SECURITY NORMAL RETIREMENT AGE (A019 < SSNRA):

R IS NOT RETIRED and NOT A HOMEMAKER (J005 NOT 5 and NOT 6):
 If you were to retire at your Social Security normal retirement age and collect benefits, what do you think your Social Security benefits would be in today's dollars?

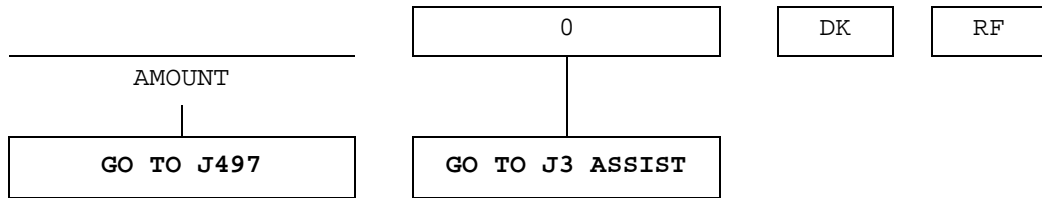
IF R IS RETIRED or A HOMEMAKER (J005=5 or 6):
 If you were to start collecting benefits at your Social Security normal retirement age, what do you think your Social Security benefits would be in today's dollars?

IF R's AGE IS SOCIAL SECURITY NORMAL RETIREMENT AGE (A019=SSNRA):

R IS NOT RETIRED and NOT A HOMEMAKER (J005 NOT 5 and NOT 6):
 If you were to retire now and collect benefits, what do you think your Social Security benefits would be in today's dollars?

IF R IS RETIRED or A HOMEMAKER (J005=5 or 6):
 If you were to start collecting benefits now, what do you think your Social Security benefits would be in today's dollars?

[IWER: DO NOT PROBE DK/RF]



J494-J496 Unfolding Sequence

Question text: Do you expect it to be less than \$____ per month, more than \$____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
 BREAKPOINTS: \$600, \$900, \$1,200, \$1,500
 RANDOM ENTRY POINTS: \$900, \$1,200
 ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X501
 ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

J497 BRANCHPOINT: GO TO J3 ASSIST

J497

PER:

2. WEEK	3. EVERY TWO WEEKS/BI-WEEKLY	4. MONTH
6. YEAR	7. OTHER (SPECIFY) _____ J498	8. DK
		9. RF

J3 ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION - EMPLOYMENT?

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 M