

HRS 2016 -- SECTION S: WIDOWHOOD/DIVORCE
FINAL VERSION -- 8/15/2016

**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})

R'S **CHILD'S OR STEPCHILD'S NAME** (Preload_Children_X058)

R'S **CHILD'S OR STEPCHILD'S RELATIONSHIP TO R** (Preload_Children_X061={3 or 4 or 6 or 7 or 90})

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'S **CHILD OR STEPCHILD'S NAME** ADDED IN SEC A (A2.ChildTab.Child[].X058)

R'S **CHILD OR STEPCHILD'S RELATIONSHIP TO R** ADDED IN SEC A (A2.ChildTab.Child[].X061 = {3 or 4 or 6 or 7 or 90 })

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 THIS IS AN EXIT INTERVIEW, GO TO SECTION T

IF THIS IS A NEW COHORT IW (X024 NOT 1), GO TO SECTION T

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 (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]?

1. START, GO TO S010
2. STOP
3. CHANGE
5. NO, GO TO END OF S003 LOOP (AFTER S015)
8. DK, GO TO END OF S003 LOOP (AFTER S015)
9. RF, 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]

_____, GO TO S008
AMOUNT

0, GO TO S010 BRANCHPOINT
DK
RF

S005-S007

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 BRANCHPOINT: IF S008 NOT 7, GO TO S010 BRANCHPOINT

S009

OTHER (SPECIFY):

OPEN

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]

_____, GO TO S014

AMOUNT

0, GO TO END OF S003 LOOP (AFTER S015)

DK

RF

S011-S013

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

S015 BRANCHPOINT: IF S014 NOT 7, GO TO END OF S003 LOOP

S015

OTHER (SPECIFY):

OPEN

*****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, GO TO S027
2. STOP
3. CHANGE
5. NO, GO TO S037
8. DK, GO TO S037
9. RF, 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]

_____, GO TO S021
AMOUNT

- 0, GO TO S023
DK
RF

S018-S020

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 BRANCHPOINT: IF S021 NOT 7, GO TO S023

S022

OTHER (SPECIFY):

OPEN

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]

_____, GO TO S027 BRANCHPOINT

HOURS

DK

RF

S024-S026

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]

_____, GO TO S031

AMOUNT

0, GO TO S033

DK

RF

S028-S030

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 BRANCHPOINT: IF S031 NOT 7, GO TO S033

S032

OTHER (SPECIFY):

OPEN

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]

_____, GO TO S037

HOURS

DK

RF

S034-S036

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, GO TO S040 BRANCHPOINT
8. DK, GO TO S040 BRANCHPOINT
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

S039

S039 BRANCHPOINT: IF S038 NOT 97, GO TO S040 BRANCHPOINT

OTHER (SPECIFY):

OPEN

S040

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

Did you receive a life insurance settlement?

(Please include any that you may have already mentioned.)

- 1. YES
- 5. NO, GO TO S042
- 8. DK, GO TO S042
- 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]

_____, GO TO S042
AMOUNT

DK
RF

S061-S063

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?

- 1. YES
- 5. NO, GO TO S044
- 8. DK, GO TO S044
- 9. RF, GO TO S044

S043

How much did it amount to?

[IWER: DO NOT PROBE DK/RF]

_____, GO TO S044
AMOUNT

DK
RF

S064-S066

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]

_____, GO TO S048

AMOUNT

DK

RF

S045-S047

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

S049 BRANCHPOINT: IF S048 NOT 7, GO TO S050 BRANCHPOINT

S049

OTHER (SPECIFY):

OPEN

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, GO TO S052
3. SOMEONE ELSE, GO TO S052
6. GRANDCHILD
8. DK, GO TO S052
9. RF, GO TO S052

S051/S07

0

(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 IF NAMES ARE LISTED IN Preload_X058 or A2.ChildTab.X058, and relationship to R at Preload_X061 or A2.ChildTab.X061 = {3 or 4 or 6 or 7 or 90}]

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 of R's LIVING AND DEAD CHILDREN AND CURRENT (BUT NOT FORMER) STEPCHILDREN, ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

S052

(Tag#=S05

2.5)

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.

S053 BRANCHPOINT: IF S052 NOT 97, GO TO S054

S053

OTHER COUNTRY (SPECIFY):

OPEN

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, GO TO S058 BRANCHPOINT

8. DK, GO TO S058 BRANCHPOINT

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]

_____, GO TO S059
AMOUNT

- DK
RF

S067-S069

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