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.
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]?
S004
What was the usual amount before [your [husband/wife/partner]'s
death/the divorce/the separation]? [IWER: DO NOT PROBE DK/RF]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

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]

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

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

***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  4. NO  5. DK  6. RF

GO TO S027

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)  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]

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]

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]

<table>
<thead>
<tr>
<th>HOURS</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO S037</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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]?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO S040 BRANCHPOINT</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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

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?

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

GO TO S044

S043
How much did it amount to?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK  RF

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]

AMOUNT

DK  RF

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]

<table>
<thead>
<tr>
<th>1. YES, SELL ASSETS</th>
<th>2. YES, WITHDRAW MONEY</th>
<th>3. YES, GOT HELP FROM A RELATIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. INSTITUTION OR CHARITY</td>
<td>5. DID NOT DO ANYTHING SPECIAL</td>
<td>7. YES, OTHER (SPECIFY)</td>
</tr>
<tr>
<td>8. DK</td>
<td>9. RF</td>
<td></td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>1. CHILD/CHILD-IN-LAW</th>
<th>2. OTHER RELATIVE</th>
<th>3. SOMEONE ELSE</th>
<th>6. GRANDCHILD</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO S052</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GO TO S052</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. TO 52. CHILD NAME(S) [ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
</tr>
<tr>
<td>92. DECEASED CHILD</td>
</tr>
<tr>
<td>93. ALL CHILDREN</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>STATE</th>
<th>97. OTHER COUNTRY (SPECIFY)</th>
<th>98. DK</th>
<th>99. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>S053</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>CAUSE OF DEATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK</td>
</tr>
<tr>
<td>RF</td>
</tr>
</tbody>
</table>

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
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

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

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]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

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