# Relevant Information for identifying access, participation, and matching

## General Notes

Apart from the clearly noted part time and all worker statistics from SIPP, all data in the report is for the universe of persons 18-65, working full time (35+ hours a week following the BLS), and for non-government work.

Labor force participation data used in the stats referring to millions of workers are from the CPS 2023 file. Paragraph 2 discussing the differences between data sources is referring to the universe of 18-65 non-governmental workers, the later SIPP estimates are for all workers, non-government. The definition used for full/part time non-government workers are in the CPS section below.

## Survey of Consumer Finances (2022)

**Source:** <https://www.federalreserve.gov/econres/scfindex.htm>

**Definitions:**

**Access:**

X11032>0 OR

X11132>0 OR

X11332>0 OR

X11432>0 OR

X11032==-1 OR

X11132==-1 OR

X11332==-1 OR

X11432==-1 OR

X5316==1 & X6461==1 OR

X5324==1 & X6466==1 OR

X5332==1 & X6471==1 OR

X5416==1 & X6476==1 OR

X4136 == 1

**Participates:**

X11032>0 OR

X11132>0 OR

X11332>0 OR

X11432>0 OR

X11032==-1 OR

X11132==-1 OR

X11332==-1 OR

X11432==-1 OR

X5316==1 & X6461==1 OR

X5324==1 & X6466==1 OR

X5332==1 & X6471==1 OR

X5416==1 & X6476==1

**Employer Contributes:**

X11047==1 OR

X11147==1 OR

**Codebook:**

<https://www.federalreserve.gov/econres/files/codebk2022.txt>

<https://www.federalreserve.gov/econres/files/bulletin.macro.txt> (for definition of participation)

X11032 - What is the balance of your pension account now? [1st job]

X11132 - What is the balance of your pension account now? [2nd job]

X11332 - What is the balance of your spouse’s pension account now? [1st job]

X11432 - What is the balance of your spouse’s pension account now? [2nd job]

X5316 - Is this a payment or account from a (current job,) past job, a disability or military

benefit, former spouse's pension, or something else? [1st benefit]

X6461 - Is this pension currently an account plan, such as a 401(k), where you could

take the whole balance as one payment if you wanted to? [1st benefit]

X5324 - Is this a payment or account from a (current job,) past job, a disability or military

benefit, former spouse's pension, or something else? [2nd benefit]

X6466 - Is this pension currently an account plan, such as a 401(k), where you could

take the whole balance as one payment if you wanted to? [2nd benefit]

X5332 - Is this a payment or account from a (current job,) past job, a disability or military

benefit, former spouse's pension, or something else? [3rd benefit]

X6471 - Is this pension currently an account plan, such as a 401(k), where you could

take the whole balance as one payment if you wanted to? [3rd benefit]

X5416 - Is this a payment or account from a (current job,) past job, a disability or military

benefit, former spouse's pension, or something else? [4th benefit]

X6476 - Is this pension currently an account plan, such as a 401(k), where you could

take the whole balance as one payment if you wanted to? [4th benefit]

X11047 - Does your employer/the business make contributions to this plan? [1st job]

X11147 - Does your employer/the business make contributions to this plan? [2nd job]

## National Compensation Survey (2023)

**Source:** <https://www.bls.gov/ebs/publications/employee-benefits-in-the-united-states-march-2023.htm>

(Provided in a public release file summary for private employment, based on all workers of all ages.)

## Current Population Survey (2023)

**Source:** <https://cps.ipums.org/cps/index.shtml>

**Access**: PENSION == 2 | PENSION == 3

**Participates**: PENSION == 3

**Non-Government:** IND < 9370

**Full time:** UHRSWORK1>=35

**Employed in the reference period:** EMPSTAT==10 | EMPSTAT==12

**Codebook**:

<https://cps.ipums.org/cps-action/variables/PENSION#codes_section> (pension)

<https://cps.ipums.org/cps-action/variables/IND#codes_section> (industry codes)

<https://cps.ipums.org/cps-action/variables/UHRSWORK1#codes_section> (hours worked)

<https://cps.ipums.org/cps-action/variables/EMPSTAT#codes_section> (employment status)

## Survey of Income and Program Participation (2023)

**Source**: <https://www.census.gov/programs-surveys/sipp/data/datasets.html>

**Access:**

EMJOB\_401 == 1 ~ "Yes",

EMJOB\_IRA == 1 ~ "Yes",

EMJOB\_PEN == 1 ~ "Yes",

EMJOB\_401 == 2 ~ "No",

EMJOB\_IRA == 2 ~ "No",

EMJOB\_PEN == 2 ~ "No",

EOWN\_THR401 == 2 ~ "No",

EOWN\_IRAKEO == 2 ~ "No",

EOWN\_PENSION == 2 ~ "No"

**Participates:**

ESCNTYN\_401 == 1

MATCHING == “Yes”

**Employer Contributes:** EECNTYN\_401 ==1

**Non-Government:**

EJB1\_CLWRK == 5

EJB1\_CLWRK == 6

**Full time worker:** TJB1\_JOBHRS1 >=35

**Education Categories:**

EEDUC >=31 & EEDUC <= 39 ~ "High School or less",

EEDUC >= 40 & EEDUC <=42 ~ "Some college",

EEDUC >= 43 & EEDUC <= 46 ~ "Bachelor's degree or higher",

**Codebook**: <https://www.census.gov/data-tools/demo/uccb/sippdict>

EMJOB\_PEN - Any defined-benefit or cash balance plan(s) provided through main employer or

business during the reference period.

EMJOB\_401 - Any 401k, 403b, 503b, or Thrift Savings Plan account(s) provided through main

employer or business during the reference period.

EMJOB\_IRA - Any IRA or Keogh account(s) provided through main employer or business during

the reference period.

EOWN\_PENSION - Participated in a defined-benefit pension or cash balance plan during the

reference period.

EOWN\_THR401 - Owned any 401k, 403b, 503b, or Thrift Savings Plan accounts during the

reference period.

EOWN\_IRAKEO - Owned any IRA or Keogh accounts during the reference period.

ESCNTYN\_401 - During the reference period, respondent contributed to the 401k, 403b, 503b,

or Thrift Savings Plan account(s) provided through their main employer or business.

EECNTYN\_401 - Main employer or business contributed to respondent's 401k, 403b, 503b, or

Thrift Savings Plan account(s) during the reference period.