

HRS 2022 -- SECTION S: WIDOWHOOD/DIVORCE  
COMMENTED VERSION - 01/12/2022

\*\*\*\*\*

**\*\*\* NOTE FOR REVIEWERS \*\*\***

ALL CHANGES FOR THE 2022 WAVE INSTRUMENT ARE FLAGGED WITH  
**#@** LOCATED ON THE RIGHT SIDE OF THE CHANGED ITEM OR SERIES.  
THUS, ALL CHANGES CAN BE LOCATED BY SEARCHING FOR **#@** IN THE  
DESIGN CHANGE COMMENTS COLUMN.

CHANGES IN ITEMS THAT WERE IN THE 2020 INSTRUMENT APPEAR IN  
**RED**.

NEW QUESTIONS AND ASSOCIATED NEW BRANCHPOINTS, ETC., APPEAR  
IN **BLUE** SANDWICHED BETWEEN ROWS OF \*\*\*\*\* .

\*\*\*\*\*

**NOTE ABOUT BRANCHPOINTS:**

WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX,  
THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.

\*\*\*\*\*

**NOTE ABOUT COLORS:**

**ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.**

THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK  
TEXT CAN ALSO APPLY TO THE WEB INTERVIEW WHEN THERE ARE NO  
DIFFERENCES FROM THE CORE.

\*\*\*\*\*

**NOTE ABOUT BOLD/UNDERLINE TEXT:**

ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD  
IN CAPI AND WILL BE UNDERLINED FOR CAWI.

\*\*\*\*\*

**NOTE ABOUT NON-RESPONSE FLOW:**

**ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN  
CAWI INTERVIEWS WILL FOLLOW THE SAME PATH AS A REFUSAL FOR  
THAT QUESTION, UNLESS OTHERWISE SPECIFIED.**

\*\*\*\*\*

**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

S004

[Banner: Income from Social Security/Supplemental Security  
Income/Veterans Benefits/Other Retirement Pension or Annuities]

What was the usual amount before [your [husband/wife/partner]'s  
death/the divorce/the separation]?

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_ .00 ..... GO TO S008

0.....GO TO S010 BRANCHPOINT

DK

RF

[Banner: Income from Social Security/Supplemental Security  
Income/Veterans Benefits/Other Retirement Pension or Annuities]

What was the usual amount before [your [husband/wife/partner]'s  
death/the divorce/the separation]?

\$\_\_\_\_\_ .00 ..... GO TO S008

0.....GO TO S010 BRANCHPOINT

DK

RF

S005-  
S007

Question wording: (Thinking about the usual amount of [Social Security/Supplemental Security Income/ Veterans Benefits/Other Retirement Pensions or Annuities] before [your [husband/wife/partner]'s death/divorce/the separation]:)

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

Question wording: Thinking about the usual amount of [Social Security/Supplemental Security Income/ Veterans Benefits/Other Retirement Pensions or Annuities] before [your [husband/wife/partner]'s death/divorce/the separation]:

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

S008 BRANCHPOINT: GO TO S010 BRANCHPOINT

S008

**S009s** PER:

2. WEEK
3. EVERY TWO WEEKS/BI-WEEKLY
4. MONTH
6. YEAR
7. OTHER (SPECIFY) S009s\_\_\_\_\_
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

[Banner: Income from Social Security/Supplemental Security  
Income/Veterans Benefits/Other Retirement Pension or Annuities]

What was the usual amount after [your [husband/wife/partner]'s  
death/the divorce/the separation]?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 ..... GO TO S014

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

DK

RF

[Banner: Income from Social Security/Supplemental Security  
Income/Veterans Benefits/Other Retirement Pension or Annuities]

What was the usual amount after [your [husband/wife/partner]'s  
death/the divorce/the separation]?

\$ \_\_\_\_\_ .00 ..... GO TO S014

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

DK

RF

S011-  
S013

Question wording: (Thinking about the usual amount of [Social Security/Supplemental Security Income/ Veterans Benefits/Other Retirement Pensions or Annuities] after [your [husband/wife/partner]'s death/divorce/the separation]:)

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

Question wording: Thinking about the usual amount of [Social Security/Supplemental Security Income/ Veterans Benefits/Other Retirement Pensions or Annuities] after [your [husband/wife/partner]'s death/the divorce/the separation]:

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

S014 BRANCHPOINT: GO TO END OF S003 LOOP (AFTER S015)

S014

**S015s** PER:

- 2. WEEK
- 3. EVERY TWO WEEKS/BI-WEEKLY
- 4. MONTH
- 6. YEAR
- 7. OTHER (SPECIFY) S015s\_\_\_\_\_
- 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..... 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]?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 ..... GO TO S021

0.....GO TO S023

DK

RF

What was the usual amount of your earnings before [your [husband/wife/partner]'s death/the divorce/the separation]?

\$ \_\_\_\_\_ .00 ..... GO TO S021

0.....GO TO S023

DK

RF

S018-  
S020

Question wording: (Thinking about the usual amount of your earnings before [your [husband/wife/partner]'s death/the divorce/the separation]:)

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

Question wording: Thinking about the usual amount of your earning before [your [husband/wife/partner]'s death/the divorce/the separation]:

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

**S022s** 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]?

[INSTR: DO NOT PROBE DK/RF.]

HOURS \_\_\_\_\_ GO TO S027 BRANCHPOINT

DK

RF

And how many hours per week did you usually work before  
[your [husband/wife/partner]'s death/the divorce/the separation]?

HOURS \_\_\_\_\_ GO TO S027 BRANCHPOINT

DK

RF

S024-  
S026

Question wording: (Thinking about the usual amount of hours per week you worked before [your [husband/wife/partner]'s death/the divorce/the separation]):)

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

Question wording: Thinking about the usual amount of hours per week you worked before [your [husband/wife/partner]'s death/the divorce/the separation]:

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 work earnings after [your [husband/wife/partner]'s death/the divorce/the separation]?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 ..... GO TO S031

0.....GO TO S033

DK

RF

What was the usual amount of your work earnings after [your [husband/wife/partner]'s death/the divorce/the separation]?

\$ \_\_\_\_\_ .00 ..... GO TO S031

0.....GO TO S033

DK

RF

S028-  
S030

Question wording: (Thinking about the usual amount of your earnings after [your [husband/wife/partner]'s death/the divorce/the separation]):

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

Question wording: Thinking about the usual amount of your earnings after [your [husband/wife/partner]'s death/the divorce/the separation]:

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

**S032s** 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]?

[INSTR: DO NOT PROBE DK/RF.]

HOURS \_\_\_\_\_ GO TO S037

DK

RF

And how many hours per week did you usually work after  
[your [husband/wife/partner]'s death/the divorce/the separation]?

HOURS \_\_\_\_\_ GO TO S037

DK

RF

S034-

S036

Question wording: (Thinking about the number of hours per week you  
usually worked after [your [husband/wife/partner]'s death/the  
divorce/the separation]):)

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

Question wording: Thinking about the number hours per week you usually worked after [your [husband/wife/partner]'s death/the divorce/the separation]:

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

**S039S** What changed about your health insurance?

[INSTR: SELECT 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\_\_\_\_\_
- 98. DK
- 99. RF

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.....GO TO S042
- 8. DK.....GO TO S042
- 9. RF.....GO TO S042

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

[Banner: Life Insurance Settlement]

How much did it amount to?

[INSTR: INCLUDE ONLY SETTLEMENTS RELATED TO SPOUSE/PARTNER'S DEATH.]

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_ .00 ..... GO TO S042

DK

RF

[Banner: Life Insurance Settlement]

How much did it amount to?

[INSTR: PLEASE INCLUDE ONLY SETTLEMENTS RELATED TO YOUR SPOUSE / OR PARTNER'S DEATH.]

\$\_\_\_\_\_ .00 ..... GO TO S042

DK

RF

S061-

S063

Question text: (Thinking about the life insurance settlement you received:)

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

Question text: Thinking about the life insurance settlement you received:

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

[Banner: Lump-Sum Pension Settlement]

How much did it amount to?

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_ .00 ..... GO TO S044

DK

RF

[Banner: Lump-Sum Pension Settlement]

How much did it amount to?

\$\_\_\_\_\_ .00 ..... GO TO S044

DK

RF

S064-

S066

Question text: (Thinking about the lump-sum pension settlement you received:)

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

Question text: Thinking about the lump-sum pension settlement you received:

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.?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER [CTRL-D] IF NOT SETTLED YET.]

\$ \_\_\_\_\_ .00 ..... GO TO S048

DK

RF

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.?

\$ \_\_\_\_\_ .00 ..... GO TO S048

DK

RF

S045-

S047

Question wording: (Thinking about the expenses associated with the death, that were not covered by insurance or your [husband/wife/partner]'s estate:)

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

Question wording: Thinking about the expenses associated with the death, that were not covered by insurance or your [husband/wife/partner]'s estate:

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

**S049s** 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?

[INSTR: SELECT 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

[Banner: Final Illness and Death Expenses: Help From a Relative]

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

[Banner: Final Illness and Death Expenses: Help From a Relative]

(Which child is that?)

[INSTR: SELECT ALL THAT APPLY.]

[INSTR: IF GRANDCHILD:

Which child of yours or your [husband/wife/partner] is the parent of that grandchild?]

CHILD NAME(S) [DISPLAYED BY BLAISE 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 LIVING AND DEAD CHILDREN AND CURRENT (BUT NOT FORMER) STEPCHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.*

[Banner: Final Illness and Death Expenses: Help From a Relative]

Which child is that?

[INSTR: PLEASE SELECT ALL THAT APPLY.]

[INSTR: IF GRANDCHILD:

Which child of yours or your [husband/wife/partner] is the parent of that grandchild?]

CHILD NAME(S) [DISPLAYED BY BLAISE IF NAMES ARE LISTED AT  
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 LIVING AND DEAD CHILDREN AND CURRENT (BUT NOT FORMER) STEPCHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.*

S052

(Tag#=S

052.5)

S052 In which state or country did your [husband/wife/partner] die?

[INSTR: TYPE 'OT' TO ENTER COUNTRY.]

STATE\_\_\_\_\_

97. OTHER COUNTRY (SPECIFY) S053\_\_\_\_\_

98. DK

99. RF

*NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.*

In which state or country did your [husband/wife/partner] die?

[INSTR: IF YOUR [HUSBAND/WIFE/PARTNER] DIED OUTSIDE OF THE U.S., PLEASE SELECT 'OTHER COUNTRY' FROM THE BOTTOM OF THE LIST BELOW AND ENTER THE NAME OF THE COUNTRY.]

STATE \_\_\_\_\_

97. OTHER COUNTRY (SPECIFY) S053 \_\_\_\_\_

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 your  
former [husband/wife/partner/spouse] 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?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 ..... GO TO S059

DK

RF

All in all, what were your expenses associated with the  
[divorce/separation], that is, legal fees and costs?

\$ \_\_\_\_\_ .00 ..... GO TO S059

DK

RF

S067-  
S069

Question text: (Thinking about the total expenses associated with [divorce/separation], that is, legal fees and costs:)

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

Question text: Thinking about the total expenses associated with [divorce/separation] that is, legal fees and costs:

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

[INSTR: 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**