

# UnderStandingAmericaStudy

UAS 97: HEALTH AND RETIREMENT STUDY SECTIONS J-M



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Fielded June 30, 2017 - October 30, 2020

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# 1 INTRODUCTION

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This UAS panel survey, titled "UAS97: Health and Retirement Study Sections J-M", administers the Health and Retirement Study sections J (Current Job), J2 (Pensions), J3 (Retirement and Social Security), and M (Disability). The survey focuses on respondents' current job status, pensions and health related work impairments. This survey is no longer in the field. Respondents were paid \$20 to complete the survey.

*The UAS HRS data collections are modeled on the University of Michigan's Health and Retirement Study. Questions were adapted to online use, and collected by CESR through the UAS. More information about the UAS HRS data collections is available online at <https://uasdata.usc.edu/page/Health+And+Retirement>. For information about HRS variables not covered in this codebook, please refer to the HRS documentation at <http://hrsonline.isr.umich.edu/>.*

## 1.1 Topics

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This survey contains questions (among others) on the following topics: Employment Labor Market, Retirement Pensions. A complete survey topic categorization for the UAS can be found here.

## 1.2 Experiments

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This survey includes experiment(s) of the following type(s): Auxiliary Randomization. Please refer to explanatory comments in the Routing section for detailed information. A complete survey experiment categorization for the UAS can be found here.

## 1.3 Citation

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Each publication, press release or other document that cites results from this survey must include an acknowledgment of UAS as the data source and a disclaimer such as, 'The project described in this paper relies on data from survey(s) administered by the Understanding America Study, which is maintained by the Center for Economic and Social Research (CESR) at the University of Southern California. The content of this paper is solely the responsibility of the authors and does not necessarily represent the official views of USC or UAS.' For any questions or more information about the UAS, contact Tania Gutsche, Project and Panel Manager, Center for Economic and Social Research, University of Southern California, at [tgutsche@usc.edu](mailto:tgutsche@usc.edu).

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## 2 SURVEY RESPONSE AND DATA

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### 2.1 Sample selection and response rate

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The sample selection for this survey was:

All active respondents who completed HRS Wave 2 E-H (UAS96).

As such, this survey was made available to 4566 UAS participants. Of those 4566 participants, 4492 completed the survey and are counted as respondents. Of those who are not counted as respondents, 16 started the survey without completing and 58 did not start the survey. The overall response rate was 98.38%.

Note: We are unable to provide sample weights for a small number of UAS members (see the Sample weighting section below for details). If they completed the survey, these members are included in the data set with a weight of zero, but accounted for in the computation of total sample size and survey response rate.%.

The detailed survey response rate is as follows:

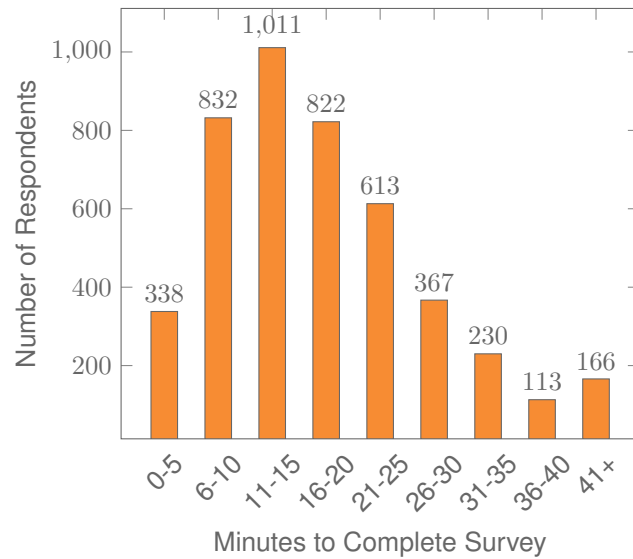
UAS97 - Response Overview	
Size of selected sample	4566
Completed the survey	4492
Started but did not complete the survey	16
Did not start the survey	58
Response rate	98.38%

### 2.2 Timings

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The survey took respondents an average of 18 minutes, and the full distribution of survey response times is available in the figure below. Times per question are available upon request.

Distribution of Respondents' Survey Response Times



### 2.3 Sample & Weighting

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Weights are included in the data set for this survey. This survey dataset may contain respondents with a weight of zero. These respondents belong to a small group of UAS members for whom sample weights cannot be computed due to non-probability recruitment for special projects. Hence, while they are accounted for in the total number of survey respondents, they do not contribute to any statistics using sample weights. For more details on the UAS weighing procedures please refer to the UAS Weighting Procedures V1. Please contact UAS staff with any questions.

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### 3 STANDARD VARIABLES

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Each Understanding America Study data contains a series of standard variables, consisting of individual, household and sample identifiers, language indicator, time stamps and a rating by the respondent of how much he or she liked the survey:

- **uasid**: the identifier of the respondent. This identifier is assigned to a respondent at recruitment and stays with the respondent throughout each and every survey he/she participates in. When analyzing data from multiple surveys, the 'uasid' can be used to merge data sets.
- **uashhid**: the household identifier of the respondent. Every member is assigned a household identifier, stored in the variable 'uashhid'. For the primary respondent this identifier equals his or her 'uasid'. All other eligible members of the primary respondent's household (everyone who is 18 or older in the household) who become UAS respondents receive the 'uasid' of the primary respondent as their household identifier. The identifier 'uashhid' remains constant over time for all respondents. Thus it is always possible to find the original UAS household of an UAS panel member (even after they, for example, have moved out to form another household).
- **survhhid**: uniquely identifies the household a UAS panel member belongs to in a given survey. For instance, if the primary respondent and his/her spouse are both UAS members at the time of a given survey, they both receive the same 'survhhid' identifier for that survey. If they subsequently split, they receive two different 'survhhid' in subsequent surveys. They, however, always share the same 'uashhid'. The identifier 'survhhid' is set to missing (.) if no other household members are UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, household members have different 'survhhid' reflecting different household compositions at the time they answered the survey. For instance, suppose that the primary respondent and his/her spouse are both UAS members. If the primary respondent answers the survey when he/she is living with the spouse, but the spouse answers the survey when the couple has split, they receive different 'survhhid'. Hence, the variable 'survhhid' identifies household membership of UAS panel members, at the time the respondent answers the survey. Note: in the My Household survey 'survhhid' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.
- **uasmembers**: is the number of other household members who are also UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, the primary respondent of a household has a value of '0', whereas the second UAS household respondent has a value of '1'. Therefore 'uasmembers' should be interpreted as the

number of household and UAS panel members at the time the respondent answers the survey. Note: in the My Household survey 'uasmembers' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.

- **sampleframe**: indicates the sampling frame from which the household of the respondent was recruited. All UAS recruitment is done through address based sampling (ABS) in which samples are acquired based on postal records. Currently, the variable 'sampleframe' takes on four values reflecting four distinct sample frames used by the UAS over the year (in future data sets the number of sample frames used for recruitment may increase if additional specific populations are targeted in future recruitment batches):
  1. U.S. National Territory: recruited through ABS within the entire U.S.
  2. Areas high concentration Nat Ame: recruited through ABS in areas with a high concentration of Native Americans in the zip-code. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
  3. Los Angeles County: recruited through ABS within Los Angeles County.
  4. California: recruited through ABS within California.

Note: prior to March 6, 2024 this variable was called sampletype and had the following value labels for the above list in UAS data sets:

1. Nationally Representative Sample: recruited through ABS within the entire U.S.
  2. Native Americans: recruited through ABS in areas with a high concentration of Native Americans. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
  3. LA County: recruited through ABS within Los Angeles County.
  4. California: recruited through ABS within California.
- **batch**: indicates the batch from which the respondent was recruited. Currently, this variable takes the following values (in future data sets the number of batches may increase as new recruitment batches are added to the UAS):
    1. ASDE 2014/01
    2. ASDE 2014/01
    3. ASDE 2014/01
    4. Public records 2015/05
    5. MSG 2015/07
    6. MSG 2016/01
    7. MSG 2016/01
    8. MSG 2016/01
    9. MSG 2016/02

10. MSG 2016/03
11. MSG 2016/04
12. MSG 2016/05
13. MSG 2016/08
14. MSG 2017/03
15. MSG 2017/11
16. MSG 2018/02
17. MSG 2018/08
18. MSG 2019/04
19. MSG 2019/05
20. MSG 2019/11
21. MSG 2020/08
22. MSG 2020/10
23. MSG 2021/02
24. MSG 2021/08
25. MSG 2021/08
26. MSG 2022/02
27. MSG 2022/02
28. MSG 2022/08
29. MSG 2022/11
30. MSG 2022/11
31. MSG 2023/01
32. MSG 2023/06
33. MSG 2023/09
34. MSG 2023/10

Note: prior to March 6, 2024 this variable had the following value labels for the above list in UAS data sets:

1. ASDE 2014/01 Nat.Rep.
2. ASDE 2014/01 Native Am.
3. ASDE 2014/11 Native Am.
4. LA County 2015/05 List Sample
5. MSG 2015/07 Nat.Rep.
6. MSG 2016/01 Nat.Rep. Batch 2
7. MSG 2016/01 Nat.Rep. Batch 3



8. MSG 2016/01 Nat.Rep. Batch 4
9. MSG 2016/02 Nat.Rep. Batch 5
10. MSG 2016/03 Nat.Rep. Batch 6
11. MSG 2016/04 Nat.Rep. Batch 7
12. MSG 2016/05 Nat.Rep. Batch 8
13. MSG 2016/08 LA County Batch 2
14. MSG 2017/03 LA County Batch 3
15. MSG 2017/11 California Batch 1
16. MSG 2018/02 California Batch 2
17. MSG 2018/08 Nat.Rep. Batch 9
18. MSG 2019/04 LA County Batch 4
19. MSG 2019/05 LA County Batch 5
20. MSG 2019/11 Nat. Rep. Batch 10
21. MSG 2020/08 Nat. Rep. Batch 11
22. MSG 2020/10 Nat. Rep. Batch 12
23. MSG 2021/02 Nat. Rep. Batch 13
24. MSG 2021/08 Nat. Rep. Batch 15
25. MSG 2021/08 Nat. Rep. Batch 16
26. MSG 2022/02 Nat. Rep. Batch 17 (priority)
27. MSG 2022/02 Nat. Rep. Batch 17 (regular)
28. MSG 2022/08 Nat. Rep. Batch 18
29. MSG 2022/11 LA County Batch 6
30. MSG 2022/11 Nat. Rep. Batch 20
31. MSG 2023/01 Nat. Rep. Batch 21
32. MSG 2023/06 Nat. Rep. Batch 22
33. MSG 2023-09 Native Am. Batch 3
34. MSG 2023-10 Nat. Rep. Batch 23

- **primary\_respondent**: indicates if the respondent was the first person within the household (i.e. to become a member or whether s/he was added as a subsequent member. A household in this regard is broadly defined as anyone living together with the primary respondent. That is, a household comprises individuals who live together, e.g. as part of a family relationship (like a spouse/child/parent) or in context of some other relationship (like a roommate or tenant).
- **hardware**: indicates whether the respondent ever received hardware or not. Note: this variable should not be used to determine whether a respondent received hardware at a given point in time and/or whether s/he used the hardware to participate in a survey. Rather, it indicates whether hardware was ever provided:

1. None
  2. Tablet (includes Internet)
- **language**: the language in which the survey was conducted. This variable takes a value of 1 for English and a value of 2 for Spanish.
  - **start\_date (start\_year, start\_month, start\_day, start\_hour, start\_min, start\_sec)**: indicates the time at which the respondent started the survey.
  - **end\_date (end\_year, end\_month, end\_day, end\_hour, end\_min, end\_sec)**: indicates the time at which the respondent completed the survey.
  - **cs\_001**: indicates how interesting the respondent found the survey.

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## 4 BACKGROUND DEMOGRAPHICS

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Every UAS survey data set includes demographic variables, which provide background information about the respondent and his/her household. Demographic information such as age, ethnicity, education, marital status, work status, state of residence, family structure is elicited every quarter through the “My Household” survey. The demographic variables provided with each survey are taken from the most recent ‘MyHousehold’ survey answered by the respondent. If at the time of a survey, the information in “My Household” is more than three months old, a respondent is required to check and update his or her information before being able to take the survey.

The following variables are available in each survey data set:

- **gender**: the gender of the respondent.
- **dateofbirth\_year**: the year of birth of the respondent.
- **age**: the age of the respondent at the start of the survey.
- **agerange**: if the respondent’s age cannot be calculate due to missing information, ‘agerange’ indicates the approximate age. Should a value for both the ‘age’ and ‘agerange’ be present, then ‘age’ takes precedence over ‘agerange’.
- **citizenus**: indicates whether the respondent is a U.S. citizen.
- **bornus**: indicates whether the respondent was born in the U.S.
- **stateborn**: indicates the state in which the respondent was born. This is set to missing (.) if the respondent was not born in the U.S.
- **countryborn**: indicates the country in which the respondent was born. This is set to missing (.) if the respondent was born in the U.S.
- **countryborn\_other**: indicates the country of birth if that country is not on the drop down list of countries shown to the respondent’.
- **statereside**: the state in which the respondent is living.
- **immigration\_status**: indicates whether the respondent is an immigrant. It takes one of the following values: 0 Non-immigrant, 1 First generation immigrant (immigrant who migrated to the U.S), 2 Second generation immigrant (U.S.-born children of at least one foreign-born parent), 3 Third generation immigrant (U.S.-born children of at least one U.S.-born parent, where at least one grandparent is foreign-born), or 4 Unknown immigrant status.
- **maritalstatus**: the marital status of the respondent.
- **livewithpartner**: indicates whether the respondent lives with a partner.

- **education**: the highest level of education attained by the respondent.
- **hisplativo**: indicates whether the respondent identifies him or herself as being Hispanic or Latino. This variable is asked separately from race.
- **hisplatinogroup**: indicates which Hispanic or Latino group a respondent identifies him or herself with. This is set to missing (.) if the respondent does not identify him or herself as being Hispanic or Latino.
- **white**: indicates whether the respondent identifies him or herself as white (Caucasian).
- **black**: indicates whether the respondent identifies him or herself as black (African-American).
- **nativeamer**: indicates whether the respondent identifies him or herself as Native American (American Indian or Alaska Native).
- **asian**: indicates whether the respondent identifies him or herself as Asian (Asian-American).
- **pacific**: indicates whether the respondent identifies him or herself as Native Hawaiian or Other Pacific Islander.
- **race**: indicates the race of the respondent as singular (e.g., '1 White' or '2 Black') or as mixed (in case the respondent identifies with two or more races). The value '6 Mixed' that the respondent answered 'Yes' to at least two of the single race categories. This variable is generated based on the values of the different race variables (white, black, nativeamer, asian, pacific). This composite measure is not conditional on hisplativo, so an individual may identify as Hispanic or Latino, and also as a member of one or more racial groups.
- **working**: indicates whether the respondent is working for pay.
- **sick\_leave**: indicates whether the respondent is not working because sick or on leave.
- **unemp\_layoff**: indicates whether the respondent is unemployed or on lay off.
- **unemp\_look**: indicates whether the respondent is unemployed and looking for a job.
- **retired**: indicates whether the respondent is retired.
- **disabled**: indicates whether the respondent has a disability.
- **If\_other**: specifies other labor force status.
- **laborstatus**: indicates the labor force status of the respondent as singular (e.g., '1 Working for pay' or '2 On sick or other leave') or as mixed (in case the respondent selects two or more labor statuses). The value '8 Mixed' indicates that the respondent answered 'Yes' to at least two of the single labor force status variables. This variable is generated based on the values of the different labor status variables (working, sick\_leave, unempl\_layoff, unempl\_look, retired, disabled, If\_other).

- **employmenttype**: indicates the employment type of the respondent (employed by the government, by a private company, a nonprofit organization, or self-employed). This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **workfullpart**: indicates whether the respondent works full or part-time. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **hourswork**: indicates the number of hours the respondent works per week. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **hhincome**: is the total combined income of all members of the respondent's household (living in their household) during the past 12 months.
- **anyhhmember**: indicates whether there were any members in the respondent's household at the time he/she answered the survey as reported by the respondent.
- **hhmembernumber**: indicates the number of household members in the respondent's household at the time of the survey as reported by the respondent. It may be that 'anyhhmember' is 'Yes', but 'hhmembernumber' is missing if the respondent did not provide the number of household members at the time of the survey.
- **hhmemberin\_#**: indicates whether a household member is currently in the household as reported by the respondent. Household members are never removed from the stored household roster and their information is always included in survey data sets. The order of the roster is the same order in which household members were specified by the respondent in the 'MyHousehold' survey. The order is identified by the suffix \_# (e.g., \_1 indicates the first household member, \_2 the second household member, etc.).

As an example, if the first household member is in the household at the time of the survey, 'hhmemberin\_1' is set to '1 HH Member 1 is in the HH'; if he/she has moved out, 'hhmemberin\_1' is set to '0 HH member 1 is no longer in the HH'. Since information of other household members (stored in the variables listed below) is always included in survey data sets, information about 'hhmemberin\_1' is available whether this person is still in the household or has moved out.

- **hhmembergen\_#**: indicates the gender of another household member as reported by the respondent.
- **hhmemberage\_#**: indicates the age of another household member. The age is derived from the month and year of birth of the household member as reported by the respondent.
- **hhmemberrel\_#**: indicates the relationship of the respondent to the other household member as reported by the respondent.

- **hhmemberuasid\_#**: is the 'uasid' of the other household member if this person is also a UAS panel member. It is set to missing (.) if this person is not a UAS panel member at the time of the survey. Since this identifier is directly reported by the respondent (chosen from a preloaded list), it may differ from the actual (correct) 'uasid' of the UAS member it refers to because of reporting error. Also, this variable should not be used to identify UAS members in a given household at the time of the survey. This is because the variables 'hhmemberuasid\_#' are taken from the most recent 'My Household' and changes in household composition involving UAS members may have occurred between the time of the respondent answered 'My Household' and the time the respondent answers the survey. To follow UAS members of a given household, it is advised to use the identifiers 'uashhid' and 'survhhid'.
- **lastmyhh\_date**: the date on which the demographics variables were collected through the 'My Household' survey.

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## 5 MISSING DATA CONVENTIONS

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Data files provide so-called clean data, that is, answers given to questions that are not applicable anymore at survey completion (for example because a respondent went back in the survey and skipped over a previously answered question) are treated as if the questions were never asked. In the data files all questions that were asked, but not answered by the respondent are marked with (.e). All questions never seen by the respondent (or any dirty data) are marked with (.a). The latter may mean that a respondent did not view the question because s/he skipped over it; or alternatively that s/he never reached that question due to a break off. If a respondent did not complete a survey, the variables representing survey end date and time are marked with (.c). Household member variables are marked with (.m) if the respondent has less household members (e.g. if the number of household members is 2, any variables for household member 3 and up are marked with (.m)).

UAS provides data in STATA and CSV format. Stata data sets come with include variable labels that are not available in the CSV files. Value labels are provided for single-response answer option. In STATA these labels will include the labels 'Not asked' and 'Not answered' for (.a) and (.e), and will show in tabulations such as 'tab q1, missing'. For multiple-response questions a binary variable is created for each answer option indicating whether the option was selected or not. A summary variable is also provided in string format reflecting which options were selected and in which order. For example, if a question asked about favorite animals with options cat, dog, and horse, then if a respondent selected horse and then cat, the binary variables for horse and cat will be set to yes, while the overall variable would have a string value of '3-1'. If no answer was given, all binary variables and the summary variable will be marked with '.e'.

Questions that are asked multiple times are often implemented as so-called array questions. Supposing the name of such question was Q1 and it was asked in 6 different instances, your data set would contain the variables Q1\_1\_ to Q1\_6\_. To illustrate, if a survey asked the names of all children, then child\_1\_ would contain the name of the first child the respondent named and so on.

More information about the UAS data in general can be found on the UAS Data Pages web site.

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## 6 ROUTING SYNTAX

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The survey with routing presented in the next section includes all of the questions that make up this survey, the question answers when choices were provided, and the question routing. The routing includes descriptions of when questions are grouped, conditional logic that determines when questions are presented to the respondent, randomization of questions and answers, and fills of answers from one question to another.

If you are unfamiliar with conditional logic statements, they are typically formatted so that **if** the respondent fulfills some condition (e.g. they have a cellphone or a checking account), **then** they are presented with some other question or the value of some variable is changed. If the respondent does not fulfill the condition (e.g. they are not a cellphone adopter or they do not have a checking account), something **else** happens such as skipping the next question or changing the variable to some other value. Some of the logic involved in the randomization of questions or answers being presented to the respondent is quite complex, and in these instances there is documentation to clarify the process being represented by the routing.

Because logic syntax standards vary, here is a brief introduction to our syntax standards. The syntax used in the conditional statements is as follows: '=' is equal to, '<' is less than, '>' is greater than, and '!= ' is used for does not equal. When a variable is set to some number N, the statement looks like 'variable := N'.

The formatting of the questions and routing are designed to make it easier to interpret what is occurring at any given point in the survey. Question ID is the bold text at the top of a question block, followed by the question text and the answer selections. When a question or variable has associated data, the name links to the appropriate data page, so you can easily get directly to the data. Text color is used to indicate the routing: **red** is conditional logic, **gold** is question grouping, **green** is looping, and **orange** is used to document randomization and other complex conditional logic processes. The routing is written for a computer to parse rather than a human to read, so when the routing diverges significantly from what is displayed to the respondent, a screenshot of what the respondent saw is included.

The name of the randomization variables are defined in proximity to where they are put into play, and like the question ID the names of the randomization variables can be used to link directly to the associated data page.



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## 7 SURVEY WITH ROUTING

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Start of section **PreloadJ**

**intro1** (Section PreloadJ)

In this survey we want to ask you some questions about your current and past work experiences as well as how your health might affect your ability to work.

```
wave1_endtime := getHRSPreloadWave1(6,"endtime")
```

```
IF wave1_endtime = RESPONSE THEN
```

```
| Z076 := YES
```

```
ELSE
```

```
| Z076 := NO
```

```
END OF IF
```

```
A019_RAge := getHRSPreload(1, "A019_RAge")
```

```
X067AYrBorn := getHRSPreload(1, "X067AYrBorn", 2)
```

```
A028_RInNHome := getHRSPreload(1, "A167_A028")
```

```
A070_NHOwnRent := getHRSPreload(1, "A070_NHOwnRent")
```

```
A026_Rmarried := getHRSPreload(1, "A026_Rmarried")
```

```
A027_RPartnerd := getHRSPreload(1, "A027_RPartnerd")
```

```
R2X060ASex := getHRSPreload(1, "R2X060ASex")
```

```
IF A019_RAge = EMPTY THEN
```

```
| A019_RAge := floor( (strtotime(date("Y-m-d")) - strtotime(dateofbirth_year . '-' . dateof-  
birth_month . '-' . dateofbirth_day)) / 31556926);
```

```
END OF IF
```

```
ageminimum := A019_RAge
```

```
IF ageminimum = EMPTY THEN
```

```
| ageminimum := 25
```

```
ELSEIF ageminimum < 25 THEN
```

```
| ageminimum := 25
```

```
ELSEIF ageminimum > 93 THEN
```

```
| ageminimum := 25
```

```
END OF IF
```

```
ageminimum2 := A019_RAge
```

```

IF ageminimum2 = EMPTY THEN
| ageminimum2 := 30
ELSEIF ageminimum2 < 30 THEN
| ageminimum2 := 30
ELSEIF ageminimum2 > 95 THEN
| ageminimum2 := 30
END OF IF

```

```

ageminimum3 := A019_RAge

```

```

IF ageminimum3 = EMPTY THEN
| ageminimum3 := 40
ELSEIF ageminimum3 < 40 THEN
| ageminimum3 := 40
ELSEIF ageminimum3 > 93 THEN
| ageminimum3 := 40
END OF IF

```

```

FLCurrentYear := date("Y")
FLCurrentYearPlus20 := FLCurrentYear + 20
FLCurrentYearPlus50 := FLCurrentYear + 50
FLSYSYR := date("Y")
FLSYSMO := date("n")
FLTENYearsAgo := FLCurrentYear - 10
FLCurrentMonth := date("n")

```

### **intro2** (Section PreloadJ)

Before we get started, we first need to retrieve some information from our records to ensure that we ask you the right questions. This may take a few moments, so please just be patient and wait until the next screen appears. Thank you!

```

IF Z076 = YES THEN
| Z092_temp := getHRSPreloadWave1(1,"begintime")
| PrevIWMonth := date('n',strtotime(Z092_temp))
| Fill code of question Z092 executed
| Z093 := date('Y',strtotime(Z092_temp))
| Z124_temp1 := getHRSPreloadWave1(3,"J017")
| Z124_temp2 := getHRSPreloadWave1(3,"J018")
| IF Z124_temp1 = RESPONSE AND Z124_temp2 = RESPONSE THEN

```

```
| Z124 := 1
ELSE
| Z124 := 5
END OF IF
```

```
wave1_numberofpensions_J := getHRSpreloadWave1(3,"numberofpensions") - 1
```

```
IF wave1_numberofpensions_J < 0 THEN
```

```
| wave1_numberofpensions_J := 0
```

```
END OF IF
```

```
Z136 := getHRSpreloadWave1(3,"J021")
```

```
A508 := getHRSpreloadWave1(3,"JW158")
```

```
Z123 := getHRSpreloadWave1(3,"J020")
```

```
Z134 := getHRSpreloadWave1(3,"J578")
```

```
Z128 := getHRSpreloadWave1(3,"J167")
```

```
Z206_temp1 := getHRSpreloadWave1(3,"J172")
```

```
Z206_temp2 := getHRSpreloadWave1(3,"J179")
```

```
IF z123 = 5 OR (Z206_temp1 = RESPONSE AND Z206_temp1
```

```
| Z206 := 1
```

```
ELSE
```

```
| Z206 := 0
```

```
END OF IF
```

**intro3** (Section PreloadJ)

We are almost there. Thank you for your patience.

```
Z122_temp := getHRSpreloadWave1(3,"J005")
```

```
IF 4 IN Z122_temp THEN
```

```
| Z122 := 1
```

```
ELSE
```

```
| Z122 := 5
```

```
END OF IF
```

```
IF wave1_numberofpensions_J > 0 THEN
```

```
| Z133 := YES
```

```
ELSE
```

```
| Z133 := NO
```

```
END OF IF
```

```
kw158 := getHRSPreloadWave1(3,"kw158")  
lw158_2 := getHRSPreloadWave1(3,"lw158_2")  
l008 := getHRSPreloadWave1(3,"l008")
```

**END OF IF**

```
X065ACouplenss := getHRSPreload(1, "X065ACouplenss", 2)  
J731 := YES  
J732 := YES  
J705 := NO  
Fill code of question FLHWP executed  
Fill code of question FLSPPHESHE executed
```

**Start of section Randomizers**

```
X501 := getHRSPreload(2, "X501")  
X502 := getHRSPreload(2, "X502")  
X503 := getHRSPreload(2, "X503")  
X504 := getHRSPreload(2, "X504")  
X505 := getHRSPreload(2, "X505")  
X506 := getHRSPreload(2, "X506")  
X507 := getHRSPreload(2, "X507")  
X508 := getHRSPreload(2, "X508")  
X509 := getHRSPreload(2, "X509")  
X510 := getHRSPreload(2, "X510")  
X511 := getHRSPreload(2, "X511")  
X512 := getHRSPreload(2, "X512")  
X513 := getHRSPreload(2, "X513")  
X514 := getHRSPreload(2, "X514")  
X515 := getHRSPreload(2, "X515")  
X053 := getHRSPreload(2, "X053")
```

**End of section Randomizers**

**End of section PreloadJ**

**Start of section Definitions**

```
Fill code of question FLBenefit executed  
Fill code of question FLContribution executed  
Fill code of question FLBenefitUpper executed  
Fill code of question FLContributionUpper executed
```

**End of section Definitions**

**Start of section SectionJ**

**introJ** (Section SectionJ)

Thank you for your patience! We are ready to begin. First we would like to start with asking some questions about your current employment situation.

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J005** (CURRENT JOB STATUS in section SectionJ)

First we want to ask you some questions about your current employment situation.

Are you working now, temporarily laid off, unemployed and looking for work, disabled and unable to work, retired, a homemaker, or what?

- 1 Working now
- 2 Unemployed and looking for work
- 3 Temporarily laid off
- 4 Disabled
- 5 Retired
- 6 Homemaker
- 7 Other, please specify:

**J006** (CURRENT JOB STATUS - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**IF 2 IN J005 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J007** (MO UNEMPLOYED in section SectionJ)

In what month and year did you become unemployed?

**J008** (YR UNEMPLOYED in section SectionJ)

**END OF GROUP**

**END OF IF**

**IF 3 IN J005 OR 8 IN J005 THEN**

**J010** (EXPECT TO GO BACK TO JOB - LAID OFF in section SectionJ)

Do you expect to go back to this job?

**IF J010 = YES THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J011** (MO LAST WORKED - LAID OFF in section SectionJ)  
In what month and year did you last work on this job?

**J012** (YR LAST WORKED - LAID OFF in section SectionJ)

END OF GROUP

END OF IF

END OF IF

IF 4 IN J005 AND (z076 = NO OR (Z076 = YES AND Z122 != 1)) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J014** (DISABLED MO in section SectionJ)  
In what month and year did you become disabled?

**J015** (DISABLED YR in section SectionJ)

END OF GROUP

END OF IF

IF 5 IN J005 AND (z076 = NO OR (Z076 = YES AND Z124 != 1)) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J017** (RETIRED MO in section SectionJ)  
In what month and year did you retire?

**J018** (RETIRED YR in section SectionJ)

END OF GROUP

END OF IF

IF 1 IN J005 OR (3 IN J005 AND J010 = YES) THEN

J020 := 1

ELSEIF z076 = YES AND A028\_RInNHome = YES AND A070\_NHOwnRent = NO AND  
Z123 != 1 THEN

J020 := 5

ELSE

**J020** (WORKING FOR PAY in section SectionJ)  
Are you doing any work for pay at the present time?

END OF IF

IF J020 = YES AND not(3 IN J005 AND J010 = YES) THEN

**J612** (NUMBER OF WEEKS WORKED IN LAST 12 MONTHS in section SectionJ)  
Counting paid vacations as weeks of work, how many weeks did you work in the last 12 months? Please count paid sick time as work time.  
RANGE 0..52

**ELSE**

**J963** (WORKED FOR PAY IN LAST 12 MONTHS in section SectionJ)  
Have you worked for pay in the last 12 months?

**IF J963 = YES THEN**

**J612** (NUMBER OF WEEKS WORKED IN LAST 12 MONTHS in section SectionJ)  
Counting paid vacations as weeks of work, how many weeks did you work in the last 12 months? Please count paid sick time as work time.  
RANGE 0..52

**END OF IF**

**END OF IF**

**IF J020 = YES THEN**

Fill code of question FLJ021 executed

**J021** (WORK FOR SOMEONE ELSE/SLF-EMPLOYED in section SectionJ)  
(On the job you plan to go back to/On your current (main) job) do you work for someone else or are you self-employed?

- 1 Working for someone else
- 2 Self-employed

**IF Z076 = YES AND z136 = 2 AND J021 = 2 THEN**

**J958** (SAME BUSINESS in section SectionJ)  
According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you were self-employed. Do you have the same business that you had in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()) or is it a different business?

- 1 Same business
- 5 Different business
- 6 I did not work for myself in (January/February/March/April/May/June/July/August/September/October/November/December) (())

j958\_asked := 1

**END OF IF**

**END OF IF**

**IF z076 = YES AND (j958\_asked != 1 OR (j958\_asked = 1 AND j958 = 5)) THEN**

**IF J021 = 1 AND z136 = 1 THEN**

Fill code of question FLJ045 executed  
Fill code of question FLJ045\_2 executed

**J045** (STILL WORKING FOR EMPLOYER in section SectionJ)

According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you were (working for ^A508/also working for someone else).

Are you still working (there/for that same employer)?

- 1 Yes
- 3 Yes, But the ownership has changed
- 4 No, the ownership has changed
- 5 No
- 7 Never worked for that employer

**IF J045 IN (1,3) THEN**

**IF A508 = RESPONSE THEN**

**JW168\_1** (CONFIRM PREVIOUS WAVE EMPLOYER in section SectionJ)

Is the correct name of your employer "(PREVIOUS EMPLOYER NAME())"?

- 1 Yes
- 5 No
- 7 I never worked for (PREVIOUS EMPLOYER NAME())

**IF JW168\_1 = 1 THEN**

JW158\_1 := A508

**ELSE**

**JW158\_1** (EMPLOYER NAME PREVIOUS WAVE CHANGED in section SectionJ)

What is the name of the company or organization for whom you work now?

STRING

**END OF IF**

**ELSE**

**JW158\_1** (EMPLOYER NAME PREVIOUS WAVE CHANGED in section SectionJ)

What is the name of the company or organization for whom you work now?

STRING

**END OF IF**

FLCurrentEmployer := JW158\_1

Fill code of question FLJ055 executed

**J055** (ANY MONTHS NOT WORKING in section SectionJ)

Were there any months since (January/February/March/April/May/June/July/August/September/October/November/December) when you did not work for (^A508/^JW158\_1/that employer)?

**IF J055 = YES THEN**



LOOP FROM Z093 TO FLCURRENTYEAR

JW777startyr2 := (FLCurrentYear + Z093) - JW777startyr

**JW777.2** (YEAR ANY MONTHS NOT WORKING in section SectionJ)  
Were there any months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) when you were not working for (^A508/^JW158\_1/that employer)?

**IF JW777.2(JW777startyr2) = 1 THEN**

**IF JW777startyr2 = FLCurrentYear THEN**

Fill code of question FLJW778 executed

**JW778.2** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working for (^A508/^JW158\_1/that employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

13 All of these months

**ELSEIF JW777startyr2 = Z093 THEN**

Fill code of question FLJW778\_min executed

**JW778.2\_min** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working for (^A508/^JW158\_1/that employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.2(JW777startyr2) := JW778.2\_min(JW777startyr2)

**ELSE**

**JW778.2\_dummy** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working for (^A508/^JW158\_1/that

employer)?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 All of these months

JW778.2(JW777startyr2) := JW778.2\_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP

END OF IF

Fill code of question FLJ058 executed

**J058** (SAME JOB TITLE in section SectionJ)

(Is your job title still the same as it was in ^z092, ^z093?/Our records indicate that in ^z092, ^z093 your job title was ^Z128.

Is this still the case?)

- 1 Yes
- 3 I am retired and working for the same employer
- 5 No
- 7 I never had that job title

**IF J058 = 7 THEN**

**J059** (PREVIOUS WAVE JOB TITLE CORRECTED in section SectionJ)

What was your job title in (January/February/March/April/May/June/July/August/September/October/November/December/January)?

STRING

**J060** (PREVIOUS WAVE JOB DESCRIPTION in section SectionJ)

What sort of work did you do?

STRING

**J061** (CURRENT JOB TITLE in section SectionJ)

What is your job title now?

STRING

**J062** (CURRENT JOB DESCRIPTION in section SectionJ)

What sort of work do you do now?

STRING

**ELSEIF J058 = 3 THEN**

**IF J018 = EMPTY THEN**

Fill code of question FLJ063 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J063** (MONTH RETIRE in section SectionJ)

(In what month and year did you retire?/In what month and year did you stop working there?/According to our records, you were working for ^A508 in ^z092, ^z093.

In what month and year did you stop working there?/According to our records, you were working for someone else in ^z092, ^z093.

In what month and year did you stop working for that employer?)

**J064** (YEAR RETIRE in section SectionJ)

**END OF GROUP**

**IF j063 = RESPONSE AND j064 = RESPONSE THEN**

**IF j064 < z093 OR (z093 = j064 AND j063 < PrevIWMonth) THEN**

**j064\_warning** (Section SectionJ)

You indicated you stopped working in (MONTH RETIRE()), (YEAR RETIRE()), which is prior to the last time we asked about this in (January/February/March/April/May/June/July/August/September/October/November/December), (()). **If this is correct, click 'Next' to continue.** Otherwise, please go back and revise your answer.

**END OF IF**

**END OF IF**

**END OF IF**

**IF not(J021 = 2 AND J063 = 94) THEN**

Fill code of question FLJ067 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J067** (EARNINGS BEFORE RETIREMENT in section SectionJ)  
(What were you earning, before deductions, when you retired?/What were you earning, before deductions, when you left that employer?)

**J071** (AMOUNT PER in section SectionJ)  
Was that per hour, week, month, or year?  
1 Hour  
2 Week  
3 Every two weeks/bi-weekly  
4 Month  
5 Twice a month  
6 Year  
7 Other, please specify:

**J072** (OTHER AMOUNT PER in section SectionJ)  
STRING

**END OF GROUP**

**IF J067 = EMPTY THEN**

**IF X502 = 1 THEN**

    J068\_Unf\_Random := 5

**ELSE**

    J068\_Unf\_Random := 6

**END OF IF**

**J068\_Unf** (Was it more, about, or less than... in section SectionJ)  
Was it more, about, or less than...

J068\_Unf\_Results := explode("'", J068\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**ELSEIF J045 IN (4,5) THEN**

Fill code of question FLJ063 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J063** (MONTH RETIRE in section SectionJ)

(In what month and year did you retire?/In what month and year did you stop working there?/According to our records, you were working for ^A508 in ^z092, ^z093.

In what month and year did you stop working there?/According to our records, you were working for someone else in ^z092, ^z093.

In what month and year did you stop working for that employer?)

**J064** (YEAR RETIRE in section SectionJ)

**END OF GROUP**

**IF j063 = RESPONSE AND j064 = RESPONSE THEN**

**IF j064 < z093 OR (z093 = j064 AND j063 < PreviWMonth) THEN**

**j064.warning** (Section SectionJ)

You indicated you stopped working in (MONTH RETIRE()), (YEAR RETIRE()), which is prior to the last time we asked about this in (January/February/March/April/May/June/July/August/September/October/November/December), (()). **If this is correct, click 'Next' to continue.** Otherwise, please go back and revise your answer.

**END OF IF**

**END OF IF**

**IF not(J021 = 2 AND J063 = 94) THEN**

Fill code of question FLJ067 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J067** (EARNINGS BEFORE RETIREMENT in section SectionJ)

(What were you earning, before deductions, when you retired?/What were you earning, before deductions, when you left that employer?)

**J071** (AMOUNT PER in section SectionJ)

Was that per hour, week, month, or year?

- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J072** (OTHER AMOUNT PER in section SectionJ)  
STRING

**END OF GROUP**

**IF J067 = EMPTY THEN**  
  **IF X502 = 1 THEN**  
    J068\_Unf\_Random := 5  
  **ELSE**  
    J068\_Unf\_Random := 6  
  **END OF IF**

**J068\_Unf** (Was it more, about, or less than... in section SectionJ)  
Was it more, about, or less than...

J068\_Unf\_Results := explode('~', J068\_Unf)

**END OF IF**  
**END OF IF**

Fill code of question FLJ073 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J073** (WHY STOPPED WORKING in section SectionJ)  
(Why did you leave that employer? Please select all that apply./Why did you stop working at that business? Please select all that apply.)  
1 The business closed  
2 I was laid off/let go  
3 Poor health/disabled  
4 Family care  
5 Better job  
6 I quit  
7 I retired  
9 Ownership changed  
10 Pension rules changed  
97 Other, please specify:

**J074** (OTHER WHY LEFT in section SectionJ)  
STRING

**END OF GROUP**

**IF 3 IN J073 OR 4 IN J073 OR 5 IN J073 OR 6 IN J073 OR 7 IN J073 OR 9  
IN J073 OR 10 IN J073 OR 97 IN J073 THEN**

**IF z136 != 2 THEN**

**J075** (DID EMPLOYMENT SITUATION CHANGE in section SectionJ)

Did your employment situation change in some way that encouraged you to leave?

**IF J075 = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J076** (HOW CHANGED in section SectionJ)

How did it change? Please select all that apply.

- 1 My supervisor encouraged departure
- 2 My coworker(s) encouraged departure
- 3 My wages were reduced (or about to be reduced)
- 4 My hours were reduced (or about to be reduced)
- 5 I would have been laid off
- 6 I got new job duties
- 7 My job location changed
- 8 I became eligible for pension
- 9 My employer changed health insurance
- 10 I received a special early retirement incentive offer
- 97 Other, please specify:

**J077** (OTHER EMPLOYMENT SITUATION CHANGED in section SectionJ)

STRING

**END OF GROUP**

**IF J076 != 4 THEN**

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section SectionJ)

If your employer had allowed you to work fewer hours with correspondingly less pay, would you have continued working there?

**END OF IF**

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

**ELSE**

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section SectionJ)

If your employer had allowed you to work fewer hours with correspondingly less pay, would you have continued working there?



**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

END OF IF

END OF IF

END OF IF

**IF 2 IN J073 THEN**

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

END OF IF

Fill code of question J080\_year executed

Fill code of question J080\_month executed

**IF not(J080\_year = EMPTY OR J080\_month = empty) AND not(z093 = J080\_year AND (PrevIWMonth + 2) > J080\_month) THEN**

Fill code of question FLJ080 executed

**J080** (ANY MONTHS NOT WORKING in section SectionJ)

(Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for ^A508?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work at this business?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for this employer?)

**IF J080 = YES THEN**

Fill code of question FLJW778\_extra executed

**LOOP FROM Z093 TO J080\_YEAR**

JW777startyr2 := (Z093 + J080\_year) - JW777startyr

**IF Z093 = J080\_year THEN**

JW777\_3(JW777startyr2) := 1

**ELSE**

**JW777.3** (YEAR ANY MONTHS NOT WORKING in section SectionJ)  
Were there any months in (STARTING YEAR FOR JW777 LOOP- -  
DECREASING YEARS()) when you were not working (at this business/for this  
employer)?

END OF IF

IF JW777.3(JW777startyr2) = 1 THEN

IF JW777startyr2 = J080\_year THEN

Fill code of question FLJW778.3\_max executed

**JW778.3\_max** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you did not work (at this business/for this  
employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 13 All of these months

JW778.3(JW777startyr2) := JW778.3\_max(JW777startyr2)

**ELSEIF JW777startyr2 = Z093 THEN**

Fill code of question FLJW778\_min executed

**JW778.3\_min** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did not work (at this business/for this employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.3(JW777startyr2) := JW778.3\_min(JW777startyr2)

**ELSE**

**JW778.3\_dummy** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did not work (at this business/for this

employer)?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 All of these months

JW778\_3(JW777startyr2) := JW778\_3\_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP

END OF IF

END OF IF

END OF IF

ELSEIF J021 != 1 AND Z136 = 1 THEN

Fill code of question FLJ063 executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J063** (MONTH RETIRE in section SectionJ)

(In what month and year did you retire?/In what month and year did you stop working there?/According to our records, you were working for ^A508 in ^z092, ^z093.

In what month and year did you stop working there?/According to our records, you were working for someone else in ^z092, ^z093.

In what month and year did you stop working for that employer?)

**J064** (YEAR RETIRE in section SectionJ)

END OF GROUP

IF j063 = RESPONSE AND j064 = RESPONSE THEN

IF j064 < z093 OR (z093 = j064 AND j063 < PrevIWMonth) THEN

**j064\_warning** (Section SectionJ)

You indicated you stopped working in (MONTH RETIRE()), (YEAR RETIRE()), which is prior to the last time we asked about this in (January/February/March/April/May/June/July/August/September/October/November/December), (()). **If this is correct, click 'Next' to continue.** Otherwise, please go back and revise your answer.

END OF IF

END OF IF

IF not(J021 = 2 AND J063 = 94) THEN

Fill code of question FLJ067 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J067** (EARNINGS BEFORE RETIREMENT in section SectionJ)

(What were you earning, before deductions, when you retired?/What were you earning, before deductions, when you left that employer?)

**J071** (AMOUNT PER in section SectionJ)

Was that per hour, week, month, or year?

- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J072** (OTHER AMOUNT PER in section SectionJ)

STRING

END OF GROUP

IF J067 = EMPTY THEN

IF X502 = 1 THEN

J068\_Unf\_Random := 5

ELSE

J068\_Unf\_Random := 6

END OF IF

**J068\_Unf** (Was it more, about, or less than... in section SectionJ)  
Was it more, about, or less than...

J068\_Unf\_Results := explode("'", J068\_Unf)

END OF IF

END OF IF

Fill code of question FLJ073 executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J073** (WHY STOPPED WORKING in section SectionJ)  
(Why did you leave that employer? Please select all that apply./Why did you stop working at that business? Please select all that apply.)

- 1 The business closed
- 2 I was laid off/let go
- 3 Poor health/disabled
- 4 Family care
- 5 Better job
- 6 I quit
- 7 I retired
- 9 Ownership changed
- 10 Pension rules changed
- 97 Other, please specify:

**J074** (OTHER WHY LEFT in section SectionJ)  
STRING

END OF GROUP

IF 3 IN J073 OR 4 IN J073 OR 5 IN J073 OR 6 IN J073 OR 7 IN J073 OR 9 IN J073 OR 10 IN J073 OR 97 IN J073 THEN

IF z136 != 2 THEN

**J075** (DID EMPLOYMENT SITUATION CHANGE in section SectionJ)  
Did your employment situation change in some way that encouraged you to leave?

IF J075 = 1 THEN

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J076** (HOW CHANGED in section SectionJ)  
How did it change? Please select all that apply.

- 1 My supervisor encouraged departure
- 2 My coworker(s) encouraged departure
- 3 My wages were reduced (or about to be reduced)

- 4 My hours were reduced (or about to be reduced)
- 5 I would have been laid off
- 6 I got new job duties
- 7 My job location changed
- 8 I became eligible for pension
- 9 My employer changed health insurance
- 10 I received a special early retirement incentive offer
- 97 Other, please specify:

**J077** (OTHER EMPLOYMENT SITUATION CHANGED in section SectionJ)  
STRING

END OF GROUP

IF J076 != 4 THEN

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section SectionJ)

If your employer had allowed you to work fewer hours with correspondingly less pay, would you have continued working there?

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

END OF IF

ELSE

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section SectionJ)

If your employer had allowed you to work fewer hours with correspondingly less pay, would you have continued working there?

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

END OF IF

END OF IF

END OF IF

IF 2 IN J073 THEN

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

END OF IF

Fill code of question J080\_year executed  
Fill code of question J080\_month executed

IF not(J080\_year = EMPTY OR J080\_month = empty) AND not(z093 = J080\_year  
AND (PrevIWMonth + 2) > J080\_month) THEN

Fill code of question FLJ080 executed

**J080** (ANY MONTHS NOT WORKING in section SectionJ)

(Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for ^A508?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work at this business?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for this employer?)

IF J080 = YES THEN

Fill code of question FLJW778\_extra executed

LOOP FROM Z093 TO J080\_YEAR

JW777startyr2 := (Z093 + J080\_year) - JW777startyr

IF Z093 = J080\_year THEN

JW777\_3(JW777startyr2) := 1

ELSE

**JW777\_3** (YEAR ANY MONTHS NOT WORKING in section SectionJ)

Were there any months in (STARTING YEAR FOR JW777 LOOP- -  
DECREASING YEARS()) when you were not working (at this business/for this  
employer)?

END OF IF

IF JW777\_3(JW777startyr2) = 1 THEN

IF JW777startyr2 = J080\_year THEN

Fill code of question FLJW778\_3\_max executed

**JW778\_3\_max** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you did not work (at this business/for this em-



ployer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778\_3(JW777startyr2) := JW778\_3\_max(JW777startyr2)

**ELSEIF JW777startyr2 = Z093 THEN**

Fill code of question FLJW778\_min executed

**JW778\_3\_min** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did not work (at this business/for this employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778\_3(JW777startyr2) := JW778\_3\_min(JW777startyr2)

**ELSE**

**JW778\_3\_dummy** (MONTHS NOT WORKING in section SectionJ)  
 Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did not work (at this business/for this employer)?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December

```

13 All of these months
    JW778.3(JW777startyr2) := JW778.3_dummy(JW777startyr2)
    END OF IF
    END OF IF
    END OF LOOP
    END OF IF
    END OF IF
ELSEIF (Z136 = 2 AND J021 != 2) OR (J021 = 2 AND J958_asked = 1 AND J958 = 5)
THEN
    Fill code of question FLJ023 executed

```

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J023** (MONTH STOPPED WORKING in section SectionJ)  
(In what month and year did you stop working for the business you were working for in ^z092, ^z093?/According to our records, in ^z092, ^z093 you were self-employed.

In what month and year did you stop working for yourself?)

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 96 Still working as a second job
- 97 I was not self-employed in (January/February/March/April/May/June/July/August/September/October/November/December)

**J024** (YEAR STOPPED WORKING in section SectionJ)  
RANGE ()..()

**END OF GROUP**

**IF J023 = 96 THEN**

**J028** (ANY MONTHS NOT WORKING in section SectionJ)

Were there any months since (January/February/March/April/May/June/July/August/September/October/November/December) when you were not working for pay?

**IF J028 = YES THEN**

**LOOP FROM Z093 TO FLCURRENTYEAR**

JW777startyr2 := (FLCurrentYear + Z093) - JW777startyr

**JW777\_1** (YEAR ANY MONTHS NOT WORKING in section SectionJ)

Were there any months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) when you were not working for pay?

**IF JW777\_1(JW777startyr2) = 1 THEN**

**IF JW777startyr2 = FLCurrentYear THEN**

Fill code of question FLJW778 executed

**JW778\_1** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working for pay?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

12 months)  
12 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
13 All of these months

**ELSEIF JW777startyr2 = Z093 THEN**

Fill code of question FLJW778\_min executed

**JW778\_1\_min** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you were not working for pay?

Choose all that apply.

1 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
2 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
3 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
4 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
5 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
6 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
7 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
8 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
9 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
10 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
11 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
12 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)  
13 All of these months

JW778\_1(JW777startyr2) := JW778\_1\_min(JW777startyr2)

**ELSE**

**JW778\_1\_dummy** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working for pay?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 All of these months

JW778\_1(JW777startyr2) := JW778\_1\_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP

END OF IF

ELSE

**J031** (PAID REGULAR SALARY in section SectionJ)  
Were you paid a regular salary or wages?

IF J031 = YES THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J032** (AMOUNT PAID REGULAR SALARY in section SectionJ)  
How much were you paid before taxes and other deductions?  
RANGE 0..9223372036854775807

**J036** (AMOUNT PER in section SectionJ)  
Was that per hour, week, month, or year?  
1 Hour  
2 Week  
3 Every two weeks/bi-weekly  
4 Month

- 5 Twice per month
- 6 Year
- 7 Other, please specify:

**J037** (OTHER AMOUNT PER in section SectionJ)  
STRING

**END OF GROUP**

**IF J032 = EMPTY THEN**  
  **IF X510 = 1 THEN**  
    J033\_Unf\_Random := 5  
  **ELSE**  
    J033\_Unf\_Random := 6  
  **END OF IF**

**J033\_Unf** (Was it more, about, or less than... in section SectionJ)  
Was it more, about, or less than...

J033\_Unf\_Results := explode('...', J033\_Unf)

**END OF IF**

**ELSE**

**J038** (RECEIVE EARNINGS in section SectionJ)  
Did you receive some or all of the net earnings or profits?

(DEF: Net earnings or profit is total business incomes less total business expenses.)

**END OF IF**

**IF not(J031 = 1 AND J038 != 1) THEN**

Fill code of question FLJ039 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J039** (AMOUNT PAID REGULAR SALARY in section SectionJ)  
(What did you earn the last year you worked?/In addition to your regular salary, how much did you receive from net earnings or profits?)  
RANGE 0..9223372036854775807

**J043** (AMOUNT PER in section SectionJ)  
Was that per hour, week, month, or year?  
1 Hour  
2 Week

- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice per month
- 6 Year
- 7 Other, please specify:

**J044** (OTHER AMOUNT PER in section SectionJ)  
STRING

**END OF GROUP**

**IF J039 = EMPTY THEN**  
  **IF X510 = 1 THEN**  
    J040\_Unf\_Random := 5  
  **ELSE**  
    J040\_Unf\_Random := 6  
  **END OF IF**

**J040\_Unf** (Was it more, about, or less than... in section SectionJ)  
Was it more, about, or less than...

J040\_Unf\_Results := explode('~', J040\_Unf)

**END OF IF**  
**END OF IF**

Fill code of question FLJ073 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J073** (WHY STOPPED WORKING in section SectionJ)  
(Why did you leave that employer? Please select all that apply./Why did you stop working at that business? Please select all that apply.)

- 1 The business closed
- 2 I was laid off/let go
- 3 Poor health/disabled
- 4 Family care
- 5 Better job
- 6 I quit
- 7 I retired
- 9 Ownership changed
- 10 Pension rules changed
- 97 Other, please specify:

**J074** (OTHER WHY LEFT in section SectionJ)



| STRING

END OF GROUP

IF 3 IN J073 OR 4 IN J073 OR 5 IN J073 OR 6 IN J073 OR 7 IN J073 OR 9  
IN J073 OR 10 IN J073 OR 97 IN J073 THEN

IF z136 != 2 THEN

**J075** (DID EMPLOYMENT SITUATION CHANGE in section SectionJ)

Did your employment situation change in some way that encouraged you to leave?

IF J075 = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J076** (HOW CHANGED in section SectionJ)

How did it change? Please select all that apply.

- 1 My supervisor encouraged departure
- 2 My coworker(s) encouraged departure
- 3 My wages were reduced (or about to be reduced)
- 4 My hours were reduced (or about to be reduced)
- 5 I would have been laid off
- 6 I got new job duties
- 7 My job location changed
- 8 I became eligible for pension
- 9 My employer changed health insurance
- 10 I received a special early retirement incentive offer
- 97 Other, please specify:

**J077** (OTHER EMPLOYMENT SITUATION CHANGED in section Sec-  
tionJ)

STRING

END OF GROUP

IF J076 != 4 THEN

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section  
SectionJ)

If your employer had allowed you to work fewer hours with correspondingly  
less pay, would you have continued working there?

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between  
(January/February/March/April/May/June/July/August/September/October/November/December),  
(()) and the time you were leaving?

END OF IF

**ELSE**

**J078** (CONTINUE WORKED IF FEWER HOURS OFFERED in section SectionJ)

If your employer had allowed you to work fewer hours with correspondingly less pay, would you have continued working there?

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

**END OF IF**

**END OF IF**

**END OF IF**

**IF 2 IN J073 THEN**

**J079** (PERMANENT REDUCTION in section SectionJ)

Did your employer experience a permanent reduction in employment between (January/February/March/April/May/June/July/August/September/October/November/December), (()) and the time you were leaving?

**END OF IF**

Fill code of question J080\_year executed

Fill code of question J080\_month executed

**IF not(J080\_year = EMPTY OR J080\_month = empty) AND not(z093 = J080\_year AND (PrevIWMonth + 2) > J080\_month) THEN**

Fill code of question FLJ080 executed

**J080** (ANY MONTHS NOT WORKING in section SectionJ)

(Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for ^A508?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work at this business?/Were there any months between ^z092, ^z093 and ^J080\_month, ^J080\_year when you did not work for this employer?)

**IF J080 = YES THEN**

Fill code of question FLJW778\_extra executed

**LOOP FROM Z093 TO J080\_YEAR**

JW777startyr2 := (Z093 + J080\_year) - JW777startyr

**IF Z093 = J080\_year THEN**

JW777.3(JW777startyr2) := 1

ELSE

**JW777.3** (YEAR ANY MONTHS NOT WORKING in section SectionJ)  
Were there any months in (STARTING YEAR FOR JW777 LOOP- -  
DECREASING YEARS()) when you were not working (at this business/for this  
employer)?

END OF IF

IF JW777.3(JW777startyr2) = 1 THEN

IF JW777startyr2 = J080\_year THEN

Fill code of question FLJW778.3\_max executed

**JW778.3\_max** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you did not work (at this business/for this  
employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)

12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)  
13 All of these months

JW778.3(JW777startyr2) := JW778.3\_max(JW777startyr2)

**ELSEIF JW777startyr2 = Z093 THEN**

Fill code of question FLJW778\_min executed

**JW778.3\_min** (MONTHS NOT WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did not work (at this business/for this employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.3(JW777startyr2) := JW778.3\_min(JW777startyr2)

```

ELSE
  JW778_3_dummy (MONTHS NOT WORKING in section SectionJ)
  Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING
  YEARS()) were those when you did not work (at this business/for this
  employer)?

  Choose all that apply.
  1 January
  2 February
  3 March
  4 April
  5 May
  6 June
  7 July
  8 August
  9 September
  10 October
  11 November
  12 December
  13 All of these months

  JW778_3(JW777startyr2) := JW778_3_dummy(JW777startyr2)

  END OF IF
  END OF IF
  END OF LOOP
  END OF IF
  END OF IF
  END OF IF
  END OF IF
  END OF IF

IF j020 = YES THEN
  IF (J021 = 1 AND z076 = YES AND J058 = 3) THEN
    FLCurrentEmployer := A508
  ELSE
    Fill code of question FLJW158_2 executed

    IF JW158_1 = RESPONSE THEN
      JW158 := JW158_1

```

ELSE

**JW158** (EMPLOYER NAME in section SectionJ)

What is the **name** of the company or organization for whom you (work now/work on your main job)?

STRING

END OF IF

FLCurrentEmployer := JW158

END OF IF

IF z076 = YES AND J045 IN (1,3) THEN

Fill code of question FLJ248.2 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J248** (MO-START WORK FOR CURRENT EMPLOYER in section SectionJ)

(In what month and year did you start working for this business?/In what month and year did you start working for this employer?/That concludes our questions on the involvement of your ^FLHWP in this business. Thinking of yourself again, in what month and year did **you** start working for this business? )

**J249** (YR-START WORK FOR CURRENT EMPLOYER in section SectionJ)

END OF GROUP

J248\_month := J248

J248\_year := J249

ELSEIF J732 = NO THEN

ELSE

Fill code of question FLJ248.2 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J248** (MO-START WORK FOR CURRENT EMPLOYER in section SectionJ)

(In what month and year did you start working for this business?/In what month and year did you start working for this employer?/That concludes our questions on the involvement of your ^FLHWP in this business. Thinking of yourself again, in what month and year did **you** start working for this business? )

**J249** (YR-START WORK FOR CURRENT EMPLOYER in section SectionJ)

END OF GROUP

```

J248_month := J248
J248_year := J249
END OF IF

IF z076 = NO THEN
|
ELSEIF z076 = YES AND (j064 = EMPTY OR j249 = empty) THEN
|
ELSEIF z076 = YES AND (j064
|
ELSE
|
Fill code of question J252_year executed

J252 (confirmation when started and left in section SectionJ)
You indicated that you started working for your current (business in ^J249/employer in
^J249) and left your previous job in (()).Is that correct?

IF J252 != 1 THEN
|
J253 (confirmation when left in section SectionJ)
Did you leave your previous employer in (())?

|
IF J253 = NO THEN
|
J254 (when stopped working in section SectionJ)
In what year did you stop working at your previous job?
RANGE (())..(())
|
END OF IF

|
J255 (confirmation when started in section SectionJ)
Did you start your current job in (YR-START WORK FOR CURRENT EMPLOYER())?

|
IF J255 = NO THEN
|
J256 (when started working in section SectionJ)
In what year did you start working at your current job?
RANGE (())..(())

|
J248_year := J256
|
END OF IF
|
END OF IF
|
END OF IF

IF z076 = YES AND J058 = 7 THEN
|
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

```

**J169** (MONTH STARTED THIS KIND OF WORK in section SectionJ)  
In what month and year did you start doing this kind of work? Please include work for previous employers.

**J170** (YEAR STARTED THIS KIND OF WORK in section SectionJ)

**END OF GROUP**

**ELSEIF** z076 = YES AND ((J045 = 1 OR J045 = 3) OR j958 = 1) **THEN**

**IF** j958 = 1 AND j732 = NO **THEN**

**ELSE**

**J168** (TYPE WORK DONE in section SectionJ)  
What sort of work do you do?  
STRING

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J169** (MONTH STARTED THIS KIND OF WORK in section SectionJ)  
In what month and year did you start doing this kind of work? Please include work for previous employers.

**J170** (YEAR STARTED THIS KIND OF WORK in section SectionJ)

**END OF GROUP**

**END OF IF**

**ELSE**

Fill code of question FLJ166 executed

**IF** J732 = YES **THEN**

**J166** (WORK IN WHAT INDUSTRY in section SectionJ)  
(What kind of business or industry do you work in, that is, what do they make or do at the place where you work?/Now we have a few questions about your current business. What industry do you work in? That is, what does your company do or make?)  
STRING

**END OF IF**

**IF** J058 IN (1,3) **THEN**

**ELSEIF** J021 != 2 AND j732 = YES **THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J167.auto** (OFFICIAL JOB TITLE in section SectionJ)  
We would like to know your official title, that is, the title that your employer uses.



Please just type your job title or keywords describing your job in the box. We will then offer you some options to choose from, and you can select the job title that best describes your current position.

**J167\_code** (CODE OFFICIAL JOB TITLE in section SectionJ)  
STRING

**J167\_open** (OTHER OFFICIAL JOB TITLE in section SectionJ)  
STRING

END OF GROUP

IF J167\_open = RESPONSE THEN

    J167 := J167\_open

ELSE

    J167 := getJobString(J167\_code)

END OF IF

END OF IF

IF z076 = YES AND j958 = 1 AND j732 = NO THEN

|

ELSE

**J168** (TYPE WORK DONE in section SectionJ)

What sort of work do you do?

STRING

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J169** (MONTH STARTED THIS KIND OF WORK in section SectionJ)

In what month and year did you start doing this kind of work? Please include work for previous employers.

**J170** (YEAR STARTED THIS KIND OF WORK in section SectionJ)

END OF GROUP

END OF IF

END OF IF

Fill code of question FLJ172 executed

**J172** (HRS WORK PER WEEK in section SectionJ)

(How many hours a week do you usually work on this job?/How many hours a week do you usually work in this business?)

RANGE 0..168

**IF J021 = 1 THEN**

Fill code of question FLJ173\_1 executed

Fill code of question FLJ173\_2 executed

**J173 (HOURS STAY SAME OR VARY in section SectionJ)**

Do you work (the same/this) number of hours nearly every week, or do the hours you work vary a lot from week to week?

1 (Same each week/This number)

2 Vary a lot

**IF J173 = 2 THEN**

**J174 (HRS PER WEEK-LONG HRS in section SectionJ)**

How many hours would you work in a week with relatively long hours?

RANGE 0..168

**J175 (HRS PER WEEK-SHORTHRS in section SectionJ)**

How many hours in a relatively short week?

RANGE 0..168

**END OF IF**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J176 (NUMBER WEEKS PAID TIME OFF in section SectionJ)**

How many weeks of paid time off do you get each year?

RANGE 0..52

**J177 (TIME UNIT FOR WEEKS PAID TIME OFF in section SectionJ)**

Time unit:

1 Days

2 Weeks

4 Months

6 None

7 Other, please specify:

**J178 (TIME UNIT FOR WKS PAID PAID TIME OFF- SPECIFY in section SectionJ)**

STRING

**END OF GROUP**

**IF J176 = 0 THEN**

J177 := 6

ELSEIF J176\_combined = 996 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J951** (NUMBER WEEKS PAID TIME OFF in section SectionJ)

How many weeks of paid time off do you get each year?

RANGE 0..52

**J952** (TIME UNIT FOR WEEKS PAID TIME OFF in section SectionJ)

1 Days

2 Weeks

4 Months

6 None

7 Other, please specify:

**J953** (TIME UNIT FOR WKS PAID PAID TIME OFF- SPECIFY in section SectionJ)

STRING

END OF GROUP

END OF IF

END OF IF

Fill code of question FLJ179 executed

**J179** (WKS PR YR USUALLY WORK in section SectionJ)

(How many weeks a year do you **usually** work on this job?/How many weeks a year do you **usually** work on this job? Please include any weeks of paid vacations.)

RANGE 0..52

IF J172 = RESPONSE AND J172

| J703 := 1

ELSE

| J703 := 0

END OF IF

IF J703 != 1 THEN

**J180** (MISS ANY DYS BECAUSE OF HEALTH in section SectionJ)

In the last 12 months, did you miss any days from work because of your health?

IF J180 = YES THEN

**J181** (# DYS MISSED in section SectionJ)

About how many days did you miss?

RANGE 0..365

END OF IF

END OF IF

IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN

ELSEIF z076 = YES AND J732 = NO THEN

ELSEIF J021 = 1 THEN

IF J176 = 996 THEN

ELSEIF Z076 = NO OR (Z076 = YES AND (not(J045 IN (1,3)) OR not(J058 IN (1,3)))) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J183\_differs** (PAID SICK DAYS PER YEAR NOT SET in section SectionJ)

How many days of paid sick leave at full pay do you earn each year?

1 Number of days:

995 No set number

**J183** (PAID SICK DAYS PER YEAR in section SectionJ)

How many days of paid sick leave at full pay do you earn each year?

RANGE 0..365

END OF GROUP

END OF IF

**J184** (LONG TERM DISABILITY in section SectionJ)

Does your employer provide coverage for long-term disability on this job?

**J185** (DECISIONS ABOUT PAY/PROMOTION in section SectionJ)

On your job, do you make decisions about the pay and promotion of others?

IF J185 = YES THEN

**J186** (OW MANY PAY AND PROMOTION DECISIONS in section SectionJ)

For how many people do you make pay and promotion decisions?

RANGE 1..99994

END OF IF

ELSE

**J187** (PAID REGULAR SALARY/WAGES in section SectionJ)

Are you paid a regular salary or wages?

IF J187 = YES THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J188** (SELF-EMPLOYMENT SALARY AMOUNT in section SectionJ)  
How much are you paid before taxes and other deductions?  
RANGE 0..99999996

**J192** (SELF-EMPLOYMENT SALARY AMOUNT PER in section SectionJ)  
Per:  
1 Hour  
2 Week  
3 Every two weeks/bi-weekly  
4 Month  
5 Twice a month  
6 Year  
7 Other, please specify:

**J193** (SELF-EMPLOYMENT SALARY AMOUNT PER - SPECIFY in section SectionJ)  
STRING

END OF GROUP

IF J188 = EMPTY THEN

IF x508 = 1 THEN

    J189\_Unf\_Random := 5

ELSE

    J189\_Unf\_Random := 6

END OF IF

**J189\_Unf** (Was it more, about, or less than... in section SectionJ)  
Per year, is it more, about, or less than...

J189\_Unf\_Results := explodeUnfolding(J189\_Unf)

IF J189\_Unf\_Results(1) = J189\_Unf\_Results(2) THEN

    J189\_Unf\_Results(3) := J189\_Unf\_Results(1)

ELSE

    J189\_Unf\_Results(3) := empty

END OF IF

END OF IF

END OF IF

**J194** (REC NET EARNINGS/PROFITS in section SectionJ)  
Do you receive some or all of the net earnings or profits?

(Net earning or profit is total business incomes less total business expenses.)

**IF J187 = YES AND J194 != 1 THEN**

**ELSE**

Fill code of question FLJ195 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J195** (AMT NET EARNINGS/PROFITS in section SectionJ)

(What did you earn last year?/In addition to your regular salary, how much do you receive from net earnings or profits?/How much do you receive from net earnings or profits?)

RANGE 0..99999996

**J199** (AMT NET EARNINGS/PROFITS PER in section SectionJ)

Per:

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

5 Twice a month

6 Year

7 Other, please specify:

**J200** (AMT NET EARNINGS/PROFITS PER - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**IF J195 = EMPTY THEN**

**IF X509 = 1 THEN**

    J196\_Unf\_Random := 5

**ELSE**

    J196\_Unf\_Random := 6

**END OF IF**

**J196\_Unf** (Was it more, about, or less than... in section SectionJ)

Per year, is it more, about, or less than...

J196\_Unf\_Results := explodeUnfolding(J196\_Unf)

**IF J196\_Unf\_Results(1) = J196\_Unf\_Results(2) THEN**

    J196\_Unf\_Results(3) := J196\_Unf\_Results(1)

```

ELSE
| J196_Unf_Results(3) := empty
| END OF IF
END OF IF
END OF IF

J201 (# EMPLOYEES IN BUSINESS in section SectionJ)
Including yourself, how many people work in this business?
RANGE 1..999995

IF J201 = EMPTY THEN
J957 (ESTIMATED # EMPLOYEES IN BUSINESS in section SectionJ)
Is it fewer than 5, 5 to 14, 15 to 24, 25 to 49, 50 to 99, 100 to 499, or 500 or more?
1 Fewer than 5
2 5 to 14
3 15 to 24
4 25 to 49
5 50 to 99
6 100 to 499
7 500 or more
END OF IF

IF (X065ACouplenss(1) IN (1,2,3,4) AND J958 = 1) OR not(X065ACouplenss(1) IN (1,2,3,4)) OR J201 = 1 THEN
|
ELSE
J202 (SP WORK IN BUSINESS in section SectionJ)
Does your (husband/wife/partner/spouse) do any work for the business?

IF J202 = YES THEN
J203 (HOURS/WEEK SP WORKS in section SectionJ)
How many hours a week does (he/she/s/he) usually work for the business?
RANGE 0..168

J204 (SP PAID REGULAR SALARY in section SectionJ)
Is (he/she/s/he) paid a regular salary?
END OF IF
END OF IF
END OF IF

IF ((X065ACouplenss(1) IN (1,2,3,4) AND J958 = 1) OR not(X065ACouplenss(1) IN (1,2,3,4)) OR J201 = 1) AND J021 != 1 THEN
|
ELSEIF J021 = 1 THEN

```

**J205** (HOW PAID ON JOB in section SectionJ)

How are you paid on this job?

- 1 Salaried
- 2 Hourly
- 3 Piecework/Commission
- 7 Other/Combination

**IF J205 = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J206** (AMOUNT OF SALARY ON JOB in section SectionJ)

How much is your salary, before taxes and other deductions?

RANGE 0..99999996

**J210** (AMOUNT OF SALARY ON JOB PER in section SectionJ)

Per:

- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J211** (AMOUNT OF SALARY ON JOB PER - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**IF J206 = EMPTY THEN**

**IF X510 = 1 THEN**

| J207\_Unf\_Random := 5

**ELSE**

| J207\_Unf\_Random := 6

**END OF IF**

**J207\_Unf** (Was it more, about, or less than... in section SectionJ)

Per year, is it more, about, or less than...

J207\_Unf\_Results := explodeUnfolding(J207\_Unf)

**IF J207\_Unf\_Results(1) = J207\_Unf\_Results(2) THEN**

| J207\_Unf\_Results(3) := J207\_Unf\_Results(1)

**ELSE**



```

| J207_Unf_Results(3) := empty
| END OF IF
END OF IF

IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
| ELSE
| J212 (HOW PAID FOR OVERTIME in section SectionJ)
| If you were to work more hours than usual during some weeks, would you get paid
| for those extra hours, get time off later, or get no compensation for the extra hours?
| 1 Extra pay
| 2 Time off
| 3 No compensation
| 6 Don't work over time

| IF J212 = 1 THEN
| GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

| J213 (OVERTIME RATE in section SectionJ)
| About how much would you make per hour for those extra hours?
| 1 Time and half
| 2 Double time
| 3 Straight time or regular wage
| 4 Per hour amount
| 7 Other, please specify:

| J214 (OVERTIME RATE - SPECIFY in section SectionJ)
| STRING

| END OF GROUP

| IF J213 = 4 THEN
| J215 (OVERTIME RATE - $ in section SectionJ)
| How much would you make per hour for each extra hour?
| RANGE 0..99999996
| END OF IF
| END OF IF
| END OF IF

| ELSEIF J205 = 2 THEN
| J216 (HRLY WAGE RATE in section SectionJ)
| What is your hourly wage rate for regular work time?
| RANGE 0..99999996

| IF J216 = EMPTY THEN

```

**IF X501 = 1 THEN**

| J217\_Unf\_Random := 5

**ELSE**

| J217\_Unf\_Random := 6

**END OF IF**

**J217\_Unf** (Was it more, about, or less than... in section SectionJ)  
Per hour, is it more, about, or less than...

J217\_Unf\_Results := explodeUnfolding(J217\_Unf)

**IF J217\_Unf\_Results(1) = J217\_Unf\_Results(2) THEN**

| J217\_Unf\_Results(3) := J217\_Unf\_Results(1)

**ELSE**

| J217\_Unf\_Results(3) := empty

**END OF IF**

**ELSE**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

| **J220** (OVERTIME RATE HOURLY WAGE in section SectionJ)

What is your hourly wage rate for overtime?

1 Time and a half

2 Double time

3 Straight time or regular wage

4 Amount per hour

5 Get time off

6 Don't work overtime

7 Other, please specify:

| **J221** (OVERTIME RATE HOURLY WAGE - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**IF J220 = 4 THEN**

| **J222** (OVERTIME RATE HOURLY WAGE - \$ PER HOUR in section SectionJ)

What is your hourly wage rate for overtime?

RANGE 0.0..999996.0

**END OF IF**

**END OF IF**

**IF (J216 = RESPONSE AND J220 = 6) THEN**

|

```

ELSEIF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
| ELSE
|   J223 (# WKS WORKED OVERTIME in section SectionJ)
|   During the last year, in how many weeks did you work some overtime?
|   RANGE 0..52
|
|   IF J223 = EMPTY OR J223 > 0 THEN
|     J224 (OVERTIME REQUIRED in section SectionJ)
|     Are you required to work overtime, or is it pretty much up to you?
|     1 Required
|     2 Sometimes required
|     3 Up to me
|   END OF IF
| END OF IF
ELSEIF J205 = 3 THEN
| GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
|
|   J225 (AMOUNT PAID FOR OVERTIME in section SectionJ)
|   What does that amount to, before taxes and other deductions, in an average week
|   or month?
|   RANGE 0..99999996
|
|   J226 (AMOUNT PAID FOR OVERTIME PER in section SectionJ)
|   Per:
|   1 Hour
|   2 Week
|   3 Every two weeks/bi-weekly
|   4 Month
|   5 Twice a month
|   6 Year
|   7 Other, please specify:
|
|   J227 (AMOUNT PAID FOR OVERTIME PER - SPECIFY in section SectionJ)
|   STRING
|
| END OF GROUP
|
| IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
| ELSE
|   GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

```

**J228\_timeoff** (HRLY OVERTIME RATE get time off in section SectionJ)

If you worked an extra hour, how much would you earn for that?

1 Amount:

0 No extra pay or time off

999995 I get time off instead

**J228** (HRLY OVERTIME RATE in section SectionJ)

If you worked an extra hour, how much would you earn for that?

RANGE 0.0..999995.0

**END OF GROUP**

**IF J228\_timeoff = RESPONSE AND J228\_timeoff != 1 THEN**

  J228 := J228\_timeoff

**END OF IF**

**END OF IF**

**ELSEIF J205 = 7 OR j205 = EMPTY THEN**

**IF J205 = 7 THEN**

**J229** (HOW PAID ON JOB - OTHER in section SectionJ)

  How are you paid?

  STRING

**END OF IF**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J230** (AMOUNT PAID in section SectionJ)

How much are you paid before taxes and other deductions?

RANGE 0..99999996

**J231** (AMOUNT PAID PER in section SectionJ)

Per:

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

5 Twice a month

6 Year

7 Other, please specify:

**J232** (AMOUNT PAID PER - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

```

IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
ELSE
|
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
|
J233_timeoff (HRLY OVERTIME RATE - OTHER get time off in section SectionJ)
If you worked an extra hour, how much would you earn for that hour?
1 Amount:
0 No extra pay or time off
99995 I get time off instead
|
J233 (HRLY OVERTIME RATE - OTHER in section SectionJ)
If you worked an extra hour, how much would you earn for that hour?
RANGE 0.0..999995.0
|
END OF GROUP
|
END OF IF
END OF IF

IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
ELSE
|
Fill code of question FLJ234 executed
|
J234 (ABLE TO REDUCE PAID WORK HRS in section SectionJ)
(Not counting overtime hours, could/Could) you reduce the number of paid hours in
your regular work schedule?
|
IF J234 = YES THEN
|
IF J172 ≥ 30 THEN
|
J940 (ABLE TO WORK HALF-TIME in section SectionJ)
If you wanted to work half time on this job, would your employer allow you to do
that?
1 Yes
3 Only temporarily
5 No
|
IF J940 = 1 THEN
|
J941 (PAY CUT IN PROPORTION TO HRS in section SectionJ)
If you reduced to half time, would your pay be cut in proportion to your reduction
in hours, would it be cut more than that, or would it be cut less than that?
1 Cut in proportion
2 Cut More
3 Cut Less

```

**J942** (REDUCED HRS- AFFECT HEALTH BENEFITS in section SectionJ)  
If you reduced to half time, would your health insurance benefits be reduced, eliminated, or kept the same?

- 1 Reduced
- 2 Eliminated
- 3 Kept the same
- 6 I don't have health insurance benefits

**J943** (REDUCED HRS- AFFECT PENSION BENEFITS in section SectionJ)  
If you reduced to half time, would your eligibility for pension benefits be affected?

- 1 Yes
- 5 No
- 6 I don't have pension benefits

END OF IF

END OF IF

ELSE

**J235** (LIKE TO REDUCE HRS in section SectionJ)  
Would you like to do so even if your earnings were reduced in the same proportion?

IF J235 = YES THEN

**J236** (DESIRED HRS OF WORK/WK- REDUCE HRS in section SectionJ)  
How many hours would you like to work each week?  
RANGE 0..168

END OF IF

END OF IF

**J241** (ABLE TO INCREASE PAID WORK HRS in section SectionJ)  
Could you increase the number of paid hours in your regular work schedule?

IF J241 = YES THEN

ELSE

**J242** (LIKE TO INCREASE HRS in section SectionJ)  
Would you like to do so if your earnings were increased in the same proportion?

IF J242 = YES THEN

**J243** (DESIRED HRS OF WORK/WK- INCREASE HRS in section SectionJ)  
How many hours would you like to work each week?  
RANGE 0..168

END OF IF

END OF IF

END OF IF

**J244** (NUMBER OF EMPLOYEES AT LOCATION in section SectionJ)  
About how many employees work for this company or organization **at the location where you work?**

RANGE 0..99999996

J244\_minimum := 0

**IF J244 = EMPTY THEN**

**J245** (ESTIMATED # EMPLOYEES AT LOCATION in section SectionJ)

Is it fewer than 5, 5 to 14, 15 to 24, 25 to 49, 50 to 99, 100 to 499, or 500 or more?

1 Fewer than 5

2 5 to 14

3 15 to 24

4 25 to 49

5 50 to 99

6 100 to 499

7 500 or more

**IF J245 = 1 THEN**

| J244\_minimum := 0

**ELSEIF J245 = 2 THEN**

| J244\_minimum := 5

**ELSEIF J245 = 3 THEN**

| J244\_minimum := 15

**ELSEIF J245 = 4 THEN**

| J244\_minimum := 25

**ELSEIF J245 = 5 THEN**

| J244\_minimum := 50

**ELSEIF J245 = 6 THEN**

| J244\_minimum := 100

**ELSEIF J245 = 7 THEN**

| J244\_minimum := 500

**END OF IF**

**ELSE**

| J244\_minimum := J244

**END OF IF**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J246\_one** (NUMBER OF EMPLOYEES AT ALL LOCATION in section SectionJ)

About how many employees work for this company or organization **at all locations?**

1 Number of people:

2 Only one location

**J246** (NUMBER OF EMPLOYEES AT ALL LOCATION in section SectionJ)  
About how many employees work for this company or organization **at all locations**?  
RANGE ()..99999996

**END OF GROUP**

IF J246\_one = EMPTY AND J246 = EMPTY AND ((J244 = RESPONSE AND J244 < 500) OR (J244 = EMPTY AND J245 != 7)) THEN

IF J244 = RESPONSE THEN

IF J244 < 5 THEN

J247\_minimum := 1

ELSEIF J244 < 15 THEN

J247\_minimum := 2

ELSEIF J244 < 25 THEN

J247\_minimum := 3

ELSEIF J244 < 50 THEN

J247\_minimum := 4

ELSEIF J244 < 100 THEN

J247\_minimum := 5

ELSEIF J244 < 500 THEN

J247\_minimum := 6

END OF IF

ELSEIF J245 = RESPONSE THEN

J247\_minimum := J245

END OF IF

**J247** (ESTIMATED # EMPLOYEES AT ALL LOCATION in section SectionJ)

Is it fewer than 5, 5 to 14, 15 to 24, 25 to 49, 50 to 99, 100 to 499, or 500 or more?

1 Fewer than 5

2 5 to 14

3 15 to 24

4 25 to 49

5 50 to 99

6 100 to 499

7 500 or more

END OF IF

END OF IF

IF Z076 = YES OR J187 = RESPONSE THEN

ELSE



**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J257** (CURRENT JOB- STARTING PAY in section SectionJ)  
What was your starting pay, before taxes and other deductions?  
RANGE 0..99999996

**J258** (CURRENT JOB- STARTING PAY- PER in section SectionJ)  
Per:  
1 Hour  
2 Week  
3 Every two weeks/bi-weekly  
4 Month  
5 Twice a month  
6 Year  
7 Other, please specify:

**J259** (CURRENT JOB- STARTING PAY- PER- SPECIFY in section SectionJ)  
STRING

**END OF GROUP**

**END OF IF**

Fill code of question J260\_year executed  
Fill code of question J260\_month executed  
J260\_diff := calculateMonths(FLCurrentYear, FLSYSMO, J260\_year, J260\_month)

**IF Z076 = YES THEN**

**IF J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN**

**ELSEIF J045 IN (1,3) THEN**

**ELSEIF J260\_year = EMPTY OR J260\_month = EMPTY OR J260\_diff < 2 THEN**

**ELSE**

**J260** (ANY MONTHS NOT WORKING in section SectionJ)  
Were there any months since (()), (()) when you did not work for this (at this business/for this employer)?

**IF J260 = YES THEN**

Fill code of question FLJW778\_extra4 executed  
start\_year := J260\_year

**IF J260\_year < Z093 THEN**

start\_year := Z093

END OF IF

LOOP FROM START\_YEAR TO FLCURRENTYEAR

JW777startyr2 := (FLCurrentYear + start\_year) - JW777startyr

IF J260\_year = FLCurrentYear THEN

JW777\_4(JW777startyr2) := 1

ELSE

**JW777.4** (YEAR ANY MONTHS NOT WORKING in section SectionJ)  
Were there any months in (STARTING YEAR FOR JW777 LOOP- -  
DECREASING YEARS()) when you were not working (at this business/for this  
employer)?

END OF IF

IF JW777\_4(JW777startyr2) = 1 THEN

IF JW777startyr2 = FLCurrentYear THEN

Fill code of question FLJW778\_4\_max executed

**JW778.4\_max** (MONTHS NOT WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you did not work (at this business/for this em-  
ployer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All  
12 months)

- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778\_4(JW777startyr2) := JW778\_4\_max(JW777startyr2)

**ELSEIF JW777startyr2 = J260\_year THEN**

Fill code of question FLJW778\_4\_min executed

**JW778\_4\_min** (MONTHS NOT WORKING in section SectionJ)  
 Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you were not working (at this business/for this employer)?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

```

12 months)
12 (January/February/March/April/May/June/July/August/September/October/November/December/All
12 months)
13 All of these months

JW778.4(JW777startyr2) := JW778.4_min(JW777startyr2)

ELSE

JW778.4_dummy (MONTHS NOT WORKING in section SectionJ)
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING
YEARS()) were those when you were not working for (at this business/for this
employer)?

Choose all that apply.
1 January
2 February
3 March
4 April
5 May
6 June
7 July
8 August
9 September
10 October
11 November
12 December
13 All of these months

JW778.4(JW777startyr2) := JW778.4_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP
END OF IF
END OF IF
END OF IF

IF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN
|
ELSEIF J021 = 1 THEN

```

Fill code of question FLJ263 executed

**J263** (CURRENT EMPLOYER EXP PERM REDUCTION in section SectionJ)

Has your employer experienced a **permanent** reduction in employment (since ^J248/^J249/since you started your current job)?

**IF J263 = YES THEN**

**J264** (CURRENT EMPLOYER- DOWNSIZE AFFECT JOBS in section SectionJ)

Has this downsizing affected workers whose jobs are similar to yours?

**END OF IF**

**IF z076 = YES AND J045 IN (1,3) THEN**

**ELSEIF J731 = NO THEN**

**IF Z076 = YES AND J058 IN (1,3) THEN**

**ELSEIF J732 = NO THEN**

**ELSE**

**J266** (UNION/EMPLOYEE-ASSOCIATION in section SectionJ)

Are you covered by a union or employee-association contract?

**END OF IF**

**ELSE**

**J720** (EMPLOYEE/GOVN'T-CURRENTPENSION SAME in section SectionJ)

Are you employed by the government at the federal, state, or local level?

This includes teachers and other service workers who are on the payrolls of local government, school districts, and other agencies of state and local government.

**IF J720 = YES THEN**

**J721** (EMPL/GOV-ST,LOCAL,FED-CURRENTPENSIONSAME in section SectionJ)

Would that be the federal, state, or local government?

1 Federal

2 State

3 Local (county, city, township)

**END OF IF**

**IF Z076 = YES AND J058 IN (1,3) THEN**

**ELSEIF J732 = NO THEN**

**ELSE**

**J266** (UNION/EMPLOYEE-ASSOCIATION in section SectionJ)

Are you covered by a union or employee-association contract?

**END OF IF**

| | END OF IF  
| END OF IF  
END OF IF

| IF A028\_RlnNHome = YES AND A070\_NHOwnRent = NO AND J020 != 1 THEN

| ELSEIF Z076 = YES AND J020 != 1 AND J705 = 1 THEN

| ELSEIF z076 = YES AND J703 = 1 AND (z206 = 1 OR Z123 = 5) THEN

| ELSE

| IF J020 != 1 THEN

| **J517** (DOING WHAT TO FIND WORK- NOT WORKING in section SectionJ)

| Have you been doing anything to find work during the last four weeks?

| IF J517 = YES THEN

| **J518** (LOOKING FULL/PART-TIME WORK- NOT WORKING in section SectionJ)

| Are you looking for part-time or full-time work?

- 1 Part-time
- 2 Full-time
- 3 Either kind

| **J519** (LOOKING SAME/DIFFERENT WORK- NOT WORKING in section SectionJ)

| Are you looking for the same kind of work you did before, or something different?

- 1 Same
- 2 Different
- 3 Either or both

| IF J519 = 2 THEN

| **J520** (HOW WOULD JOB BE DIFFERENT- NOT WORKING in section SectionJ)

| How would it be different?

| STRING

| END OF IF

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

| **J521** (WAGE/SALARY NECESSARY TO TAKE JOB in section SectionJ)

| If you were to be offered work like that, how high would the wage or salary have to be for you to take it?

| RANGE 0..99999996

| **J522** (WAGE/SALARY NECESSARY TO TAKE JOB - PER in section SectionJ)

| Per:

- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J523** (WAGE/SALARY NECESSARY TO TAKE JOB - PER - SPECIFY in section SectionJ)  
STRING

#### END OF GROUP

**IF J521 = EMPTY THEN**

**IF X502 = 1 THEN**

    J842\_Unf\_Random := 5

**ELSE**

    J842\_Unf\_Random := 6

**END OF IF**

**J842\_Unf** (Was it more, about, or less than... in section SectionJ)  
Per year, would it be more, about, or less than...

J842\_Unf\_Results := explodeUnfolding(J842\_Unf)

**IF J842\_Unf\_Results(1) = J842\_Unf\_Results(2) THEN**

    J842\_Unf\_Results(3) := J842\_Unf\_Results(1)

**ELSE**

    J842\_Unf\_Results(3) := empty

**END OF IF**

**END OF IF**

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J524** (WHAT DONE TO FIND WORK in section SectionJ)

What are all of the things you have done to find work during the last four weeks?

- 1 Read ads
- 2 Attend school or received other training
- 3 Checked with public employment agency
- 4 Check with private employment agency
- 5 Visited employers directly
- 6 Telephoned or wrote employers directly

7 Asked friends or relatives  
8 Placed or answered ads  
96 Didn't do anything specific  
97 Other, please specify:

**J525** (WHAT DONE TO FIND WORK - SPECIFY in section SectionJ)  
STRING

END OF GROUP

IF 5 IN J524 OR 6 IN J524 THEN

Fill code of question FLJ526 executed

**J526** (# EMPLOYERS CONTACT- NOT WORKING in section SectionJ)  
How many employers did you (visit/call or write)?  
RANGE 1..96

END OF IF

ELSE

**J527** (WANT JOB CURRENTLY in section SectionJ)  
Do you currently want a job, either full-time or part-time?  
1 Yes  
3 Depends  
5 No  
6 Can't work

IF J527 = 1 OR J527 = 3 THEN

**J528** (WANT FULL/PART-TIME WORK- NOT WORKING in section SectionJ)  
Would you prefer part-time or full-time?  
1 Part-time  
2 Full-time  
3 Either

END OF IF

IF J527 != 6 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J529** (WAGE NECESSARY TO TAKE REGULAR JOB NOW in section SectionJ)  
If someone offered you a regular job now, how high would the wage or salary  
have to be for you to take it?  
RANGE 0..99999996

**J533** (WAGE/SALARY NECESSARY TO TAKE JOB NOW - PER in section  
SectionJ)  
Per:



- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J534** (WAGE/SALARY NECESSARY TO TAKE JOB NOW - PER - SPECIFY in section SectionJ)  
STRING

#### END OF GROUP

```
IF J529 = EMPTY THEN
  IF X503 = 1 THEN
    J530_Unf_Random := 5
  ELSE
    J530_Unf_Random := 6
  END OF IF
END OF IF
```

**J530\_Unf** (Was it more, about, or less than... in section SectionJ)  
Per year, would it be more, about, or less than...

J530\_Unf\_Results := explodeUnfolding(J530\_Unf)

```
IF J530_Unf_Results(1) = J530_Unf_Results(2) THEN
  J530_Unf_Results(3) := J530_Unf_Results(1)
ELSE
  J530_Unf_Results(3) := empty
END OF IF
END OF IF
```

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J535** (WHY NOT LOOK FOR WORK in section SectionJ)  
What is the main reason you were not looking for work during the last four weeks?

- 1 I believe nothing is available in my line of work
- 2 I don't believe I can find work
- 3 I don't have needed skills/experience
- 4 I believe employers think I am too old
- 5 I believe employers won't hire older women or minorities
- 6 Poor health, disability

- 7 Family responsibilities/child responsibilities
- 8 Transportation problems
- 9 I don't want a job
- 95 No particular reason
- 97 Other, please specify:

**J536** (WHY NOT LOOK FOR WORK - SPECIFY in section SectionJ)  
STRING

END OF GROUP

END OF IF

END OF IF

ELSE

IF z076 = YES AND J958 = 1 AND J045 IN (1,3) AND J732 = NO THEN

|  
ELSEIF z076 = YES AND J958 = 1 AND (J248\_year = EMPTY OR J248\_month = empty)  
THEN

|  
ELSEIF z076 = YES AND J958 = 1 AND ((J248\_year = z093 AND J248\_month < Pre-  
viWMonth) OR J248\_year < Z093) THEN

|  
ELSEIF z076 = YES AND J058 IN (1,3) AND J732 = NO THEN

|  
ELSEIF z076 = YES AND J732 = NO THEN

|  
ELSE

**J501** (EDUCATION NEEDED FOR JOB in section SectionJ)  
Now we have some questions about your work experience.

Counting high school graduation as 12 years, about how many years of school  
would you say are needed to do your job reasonably well?  
RANGE 0..25

IF J501 = RESPONSE THEN

IF J501 > 0 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J502** (EXPERIENCE NEEDED FOR JOB in section SectionJ)  
For someone with this much formal schooling, about how much experience do  
you think it would take to become good at your job?  
NUMBER (NO DECIMALS ALLOWED)

**J503** (EXPERIENCE NEEDED FOR JOB - UNIT in section SectionJ)

Unit:  
1 Hours  
2 Weeks

- 4 Months
- 6 Years
- 7 Other, please specify:

**J504** (EXPERIENCE NEEDED FOR JOB - SPECIFY in section SectionJ)  
STRING

END OF GROUP

END OF IF

**J676** (CURRENT JOB COVERED BY FICA in section SectionJ)  
Is your current job covered by the Federal Insurance Contributions Act (FICA)? That is, do you pay social security taxes?

END OF IF

END OF IF

**J505** (LOOKING FOR ANOTHER JOB CURRENTLY in section SectionJ)  
Sometimes people look for a different job even when they are currently working. Are you currently looking for another job?

IF J505 = YES THEN

**J506** (JOB SEARCH IN AREA in section SectionJ)  
Are you looking for jobs only in the area where you live, or are you considering jobs that would require you to move?  
1 Jobs in this area  
2 Jobs requiring a move  
3 Both/either one

**J507** (LOOKING FULL/PART-TIME WORK in section SectionJ)  
Are you looking for part-time or full-time work?  
1 Part-time  
2 Full-time  
3 Either kind

**J508** (LOOKING SAME/DIFFERENT KIND OF WORK in section SectionJ)  
Are you looking for the same kind of work you're doing now, or something different?  
1 Same  
2 Either/both  
3 Different

IF J508 = 3 THEN

**J509** (HOW WOULD JOB BE DIFFERENT in section SectionJ)  
How would it be different?  
STRING

END OF IF

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J510** (DOING WHAT TO FIND JOB in section SectionJ)

During the past four weeks, what have you been doing to find another job?

- 1 Checked with public employment agency
- 2 Checked with private employment agency
- 3 Visited employers directly
- 4 Telephoned or wrote employers directly
- 5 Asked friends or relatives
- 6 Placed or answered ads
- 7 Read ads
- 8 Didn't do anything specific
- 97 Other, please specify:

**J511** (DOING WHAT TO FIND JOB - SPECIFY in section SectionJ)

STRING

END OF GROUP

IF 3 IN J510 THEN

**J512** (# EMPLOYERS VISITED in section SectionJ)

How many employers did you visit?

RANGE 1..95

END OF IF

IF 4 IN J510 THEN

**J513** (# EMPLOYERS CALLED/WROTE in section SectionJ)

How many employers did you call or write?

RANGE 1..95

END OF IF

ELSE

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J514** (LOOK INTO ANOTHER SIMILAR JOB in section SectionJ)

If you found out about another job like the one you have now, would you look into it?

- 1 Yes
- 2 Probably
- 3 Maybe
- 4 Probably not
- 5 No
- 7 Other, please specify:

**J515** (LOOK INTO ANOTHER SIMILAR JOB- SPECIFY in section SectionJ)

| STRING

| END OF GROUP

END OF IF

IF z076 = yes AND (j045 IN (1,3) OR j058 IN (1,3)) AND J732 = NO THEN

| ELSEIF Z076 = YES AND J732 = NO THEN

| ELSE

Fill code of question FLJ537 executed

Fill code of question FLJ537\_2 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J537** (STATEMENTS ABOUT JOB INTRO in section SectionJ)

Below are some statements that are true for some people's jobs but not for other people's jobs. Thinking of your job, please indicate how often these statements are true.

SUBGROUP OF QUESTIONS

**J538** (PHYSICAL EFFORT in section SectionJ)

My job requires lots of physical effort.

**J539** (LIFTING HEAVY LOADS in section SectionJ)

My job requires lifting heavy loads.

**J540** (STOOPING/KNEELING/CROUCHING in section SectionJ)

My job requires stooping, kneeling, or crouching.

**J541** (GOOD EYESIGHT in section SectionJ)

My job requires good eyesight.

**J542** (INTENSE CONCENTRATION in section SectionJ)

My job requires intense concentration or attention.

**J543** (PEOPLE SKILLS in section SectionJ)

My job requires skill in dealing with other people.

| END OF SUBGROUP

| END OF GROUP

END OF IF

Fill code of question FLJ544 executed

**J544** (COMPUTER USAGE in section SectionJ)

Thinking of your job, please indicate how often this statement is true:

My job requires me to work with computers.

Fill code of question FLJ545 executed

Fill code of question FLJ545.2 executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J545** (Section SectionJ)

Here are some more statements that are true for some people's jobs but not for others. Again, thinking of your job, please indicate how much you agree or disagree with each statement.

#### SUBGROUP OF QUESTIONS

**J546** (MORE DIFFICULT THINGS REQUIRED in section SectionJ)

My job requires me to do more difficult things than it used to.

**J547** (A LOT OF STRESS in section SectionJ)

My job involves a lot of stress.

**IF J021 = 1 THEN**

**J548** (PREFERENCE TO YOUNG FOR PROMOTION in section SectionJ)

In decisions about promotion, my employer gives younger people preference over older people.

**J549** (PRESSURE TO RETIRE in section SectionJ)

My co-workers make older workers feel that they ought to retire before age 65.

**END OF IF**

**J550** (GRADUALLY REDUCE HRS in section SectionJ)

As I get older, I would prefer to gradually reduce the hours I work on this job, keeping my pay per hour the same.

**IF J021 = 1 THEN**

**J551** (MOVE TO LESS DEMANDING JOB in section SectionJ)

My employer would let older workers move to a less demanding job with less pay if they wanted to.

**END OF IF**

**J552** (ENJOY GOING TO WORK in section SectionJ)

I really enjoy going to work.

**END OF SUBGROUP**

**END OF GROUP**

**J553** (ANY OTR PAID WORK in section SectionJ)

Now we have some questions about any other paid job you may have.

Are you doing any other work for pay now, such as (a/another) business of your own, a second job or the military reserves?

**IF J553 = YES THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J554** (KIND 2ND JOB in section SectionJ)

Is this your own business, a second job, the military reserves, or something else?  
Please choose all that apply.

- 1 My own business
- 2 A second job
- 3 Military reserves
- 7 Other, please specify:

**J555** (KIND 2ND JOB - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**J556** (HRS/WK ON 2ND JOB in section SectionJ)

How many hours a week do you usually work on (this other job/these other jobs)?  
RANGE 0..96

**J557** (WKS/YR ON 2ND JOB in section SectionJ)

How many weeks a year do you usually work on this other job/these other jobs?  
Please include any weeks of paid vacations.  
RANGE 0..52

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J558** (EARNINGS ON SECOND JOB in section SectionJ)

About how much do you earn before taxes from this other job/these other jobs?

RANGE 0..99999996

**J562** (EARNINGS ON SECOND JOB - PER in section SectionJ)

Per:

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

5 Twice a month

6 Year

7 Other, please specify:

**J563** (EARNINGS ON SECOND JOB - PER - SPECIFY in section SectionJ)

STRING

**END OF GROUP**

**IF J558 = EMPTY THEN**

**IF X504 = 1 THEN**

  J559\_Unf\_Random := 5

**ELSE**

  J559\_Unf\_Random := 6

**END OF IF**

**J559\_Unf** (Was it more, about, or less than... in section SectionJ)

Per year, is it more, about, or less than...

J559\_Unf\_Results := explodeUnfolding(J559\_Unf)

**IF J559\_Unf\_Results(1) = J559\_Unf\_Results(2) THEN**

  J559\_Unf\_Results(3) := J559\_Unf\_Results(1)

**ELSE**

  J559\_Unf\_Results(3) := empty

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**



```
j596_diff := calculateMonths(J248_year, J248_month, J064, J063)
j596_diff2 := calculateMonths(J248_year, J248_month, J024, J023)
```

```
IF z076 = NO THEN
|
| ELSEIF z076 = YES AND J045 IN (1,3) THEN
|
| ELSEIF z076 = YES AND z136 = 1 AND J063 = EMPTY AND J064 = EMPTY THEN
|
| ELSEIF z076 = YES AND z136 = 1 AND J248_year = RESPONSE AND J248_month =
| RESPONSE AND J063 = RESPONSE AND J064 = RESPONSE AND j596_diff < 2 THEN
|
| ELSEIF z076 = YES AND z136 = 2 AND J023 = EMPTY AND J024 = EMPTY THEN
|
| ELSEIF z076 = YES AND j958 = 1 AND ((J248_year = RESPONSE AND J248_year <
| Z093) OR (J248_year = Z093 AND J248_month = RESPONSE AND J248_month
|
| ELSEIF z076 = YES AND J020 = 1 AND ((J248_year = RESPONSE AND J248_year <
| Z093) OR (J248_year = Z093 AND J248_month = RESPONSE AND J248_month
|
| ELSEIF z076 = YES AND z136 = 2 AND J248_year = RESPONSE AND J248_month =
| RESPONSE AND j023 = RESPONSE AND j024 = RESPONSE AND j596_diff2 < 2 THEN
|
| ELSEIF J020 = 1 AND J248_year = EMPTY AND J248_month = EMPTY THEN
|
| ELSE
| Fill code of question J596_year executed
| Fill code of question J596_month executed
| Fill code of question J260_year executed
| Fill code of question J260_month executed
| Fill code of question FLJ596 executed
|
| J596 (any work for pay in section SectionJ)
| (Between ^J596_month, ^J596_year and ^J260_month, ^J260_year did you do any work
| for pay?/Since ^J596_month, ^J596_year did you do any work for pay?)
|
| IF J596 = YES THEN
| IF J020 != 1 THEN
| start_year := J596_year
|
| IF J596_year < Z093 THEN
| start_year := Z093
| END OF IF
|
| LOOP FROM START_YEAR TO FLCURRENTYEAR
```

JW777startyr2 := (FLCurrentYear + J596\_year) - JW777startyr

**IF J596\_year = FLCurrentYear THEN**

    JW777\_5(JW777startyr2) := 1

**ELSE**

**JW777\_5** (YEAR ANY MONTHS WORKING in section SectionJ)

    Were there any months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) when you did any work for pay?

**END OF IF**

**IF JW777\_5(JW777startyr2) = 1 THEN**

**IF JW777startyr2 = FLCurrentYear THEN**

        Fill code of question FLJW778.5\_max2 executed

**JW778.5\_max2** (MONTHS WORKING in section SectionJ)

        Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did any work for pay?

        Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_max2(JW777startyr2)

**ELSEIF JW777startyr2 = J596\_year THEN**

Fill code of question FLJW778.5\_min executed

**JW778.5\_min** (MONTHS WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did any work for pay?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_min(JW777startyr2)

ELSE

**JW778.5\_dummy** (MONTHS WORKING in section SectionJ)  
Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING  
YEARS()) were those when you did any work for pay?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP

ELSEIF J020 = 1 THEN

start\_year := J596\_year

IF J596\_year < Z093 THEN

start\_year := Z093

END OF IF

LOOP FROM START\_YEAR TO J260\_YEAR

JW777startyr2 := (J260\_year + J596\_year) - JW777startyr

IF J596\_year = J260\_year THEN

JW777.5(JW777startyr2) := 1

ELSE

**JW777\_5** (YEAR ANY MONTHS WORKING in section SectionJ)

Were there any months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) when you did any work for pay?

END OF IF

IF JW777\_5(JW777startyr2) = 1 THEN

IF JW777startyr2 = J260\_year THEN

Fill code of question FLJW778\_5\_max executed

**JW778\_5\_max** (MONTHS WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did any work for pay?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_max(JW777startyr2)

**ELSEIF JW777startyr2 = J596\_year THEN**

Fill code of question FLJW778.5\_min executed

**JW778.5\_min** (MONTHS WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did any work for pay?

Choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_min(JW777startyr2)

**ELSE**

**JW778.5\_dummy** (MONTHS WORKING in section SectionJ)

Which months in (STARTING YEAR FOR JW777 LOOP- -DECREASING YEARS()) were those when you did any work for pay?

Choose all that apply.

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 All of these months

JW778.5(JW777startyr2) := JW778.5\_dummy(JW777startyr2)

END OF IF

END OF IF

END OF LOOP

END OF IF

**J599** (number of hours in section SectionJ)

During these months, how many hours per week did you usually work?

RANGE 0..168

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J600** (how much earning in section SectionJ)

On average, how much were you earning before deductions during these months?

**J604** (AMOUNT PER in section SectionJ)

Was that per hour, week, month, or year?

- 1 Hour
- 2 Week
- 3 Every two weeks/bi-weekly
- 4 Month
- 5 Twice a month
- 6 Year
- 7 Other, please specify:

**J605** (OTHER AMOUNT PER in section SectionJ)

| STRING

END OF GROUP

IF J600 = EMPTY THEN

IF X505 = 1 THEN

| J601\_Unf\_Random := 5

ELSE

| J601\_Unf\_Random := 6

END OF IF

**J601\_Unf** (Was it more, about, or less than... in section SectionJ)

Was it more, about, or less than...

J601\_Unf\_Results := explodeUnfolding(J601\_Unf)

IF J601\_Unf\_Results(1) = J601\_Unf\_Results(2) THEN

| J601\_Unf\_Results(3) := J601\_Unf\_Results(1)

ELSE

| J601\_Unf\_Results(3) := empty

END OF IF

END OF IF

**J606** (how many employers in section SectionJ)

Counting yourself as an employer if you were self employed, for how many employers did you work during those months?

1 One

2 Two or more

IF J606 = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J607** (WHY STOPPED WORKING in section SectionJ)

Why did you stop working at that job?

1 Business closed

2 Laid off/let go

3 Poor health/Disabled

4 Family care

5 Better job

6 Quit

7 Retired

97 Other, please specify:



```

| J608 (other why stopped working in section SectionJ)
| STRING
|
| END OF GROUP
|
| IF J607 > 2 THEN
|   J609 (DID EMPLOYMENT SITUATION CHANGE in section SectionJ)
|   Did your employment situation change in some way that encouraged you to leave?
|
|   IF J609 = YES THEN
|     GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
|
|     J610 (HOW EMPLOYMENT SITUATION CHANGE in section SectionJ)
|     How did it change?
|     1 My supervisor encouraged departure
|     2 My coworker(s) encouraged departure
|     3 My wages were reduced (or about to be reduced)
|     4 My hours were reduced (or about to be reduced)
|     5 I would have been laid off
|     6 I got new job duties
|     7 My job location changed
|     8 I became eligible for pension
|     9 My employer changed health insurance
|     10 I received a special early retirement incentive offer
|     97 Other, please specify:
|
|     J611 (OTHER EMPLOYMENT SITUATION CHANGED in section SectionJ)
|     STRING
|
|     END OF GROUP
|   END OF IF
| END OF IF
| END OF IF
| END OF IF
| END OF IF

```

End of section **SectionJ**

Start of section **SectionK**

```

| IF J020 = YES OR 1 IN J005 THEN
|
| ELSEIF Z076 = YES THEN
|
| ELSE

```

/\* New interview questions not asked. \*/

END OF IF

End of section **SectionK**

Start of section **SectionL**

IF not(J020 = YES OR 1 IN J005) AND K003 != YES THEN

**J650** (ASSIST SECTION J in section SectionJ)

How often did you receive assistance with giving answers to the questions about your employment situation?

- 1 Never
- 2 A few times
- 3 Most or all of the time

ELSEIF not(J020 = YES OR 1 IN J005) AND K004 = EMPTY AND K005 = EMPTY THEN

**J650** (ASSIST SECTION J in section SectionJ)

How often did you receive assistance with giving answers to the questions about your employment situation?

- 1 Never
- 2 A few times
- 3 Most or all of the time

ELSEIF Z076 = YES THEN

**J650** (ASSIST SECTION J in section SectionJ)

How often did you receive assistance with giving answers to the questions about your employment situation?

- 1 Never
- 2 A few times
- 3 Most or all of the time

ELSE

/\* New interview questions not asked. \*/

END OF IF

Start of section **PreloadJ2**

IF Z076 = YES THEN

```
wave1_numberofpensions := 0  
dummy := getPastPensionsL(0)  
dummy := getPastPensionsK(wave1_numberofpensions.L)
```

**jw400\_intro2** (Section SectionJ2)

Now we would like to ask about retirement accounts and pensions from work, which are important for studying retirement planning and income.

We will first retrieve any pension information you provided to us in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

```
dummy := getPastPensionsJ(wave1_numberofpensions_K + wave1_numberofpensions_L)  
wave1_numberofpensions := wave1_numberofpensions_J + wave1_numberofpensions_K  
+ wave1_numberofpensions_L
```

LOOP FROM 1 TO WAVE1\_NUMBEROFPENSIONS

IF Z141(JCnt) = A508 THEN

| Z503(JCnt) := 1

ELSE

| Z503(JCnt) := 2

END OF IF

END OF LOOP

**jw400\_intro3** (Section SectionJ2)

Thank you for your patience. We are almost done. Please click "Next" to continue.

Fill code of question Z510\_string executed  
Z141\_temp := getUniqueValues(Z141)

END OF IF

IF Z076 = 1 AND J020 = 1 AND ((J021=1 AND Z136=1 AND (J045 = 1 OR J045 = 3))  
OR (Z136=2 AND J958=1)) THEN

| JW417 := 1

ELSE

| JW417 := 5

END OF IF

IF wave1\_numberofpensions\_J > 0 THEN

| Z276 := 1

ELSE

| Z276 := 5

END OF IF

JW416 := wave1\_numberofpensions

IF JW416 = EMPTY THEN

| JW416 := 0

END OF IF

**jw400.intro4** (Section SectionJ2)

Thanks again for your patience! Please click "Next" to continue.

End of section **PreloadJ2**

Start of section **SectionJ2**

askJ2 := NO

IF J020 = YES OR 1 IN J005 THEN

| askJ2 := YES

ELSEIF Z076 = YES THEN

| IF A019\_RAge > 79 AND not(J020 = YES OR 1 IN J005) AND (jw416 = 0 OR jw416 = empty) THEN

| | askJ2 := NO

| ELSEIF z276 = 1 AND not(J020 = YES OR 1 IN J005) AND (jw416 = 0 OR jw416 = empty) THEN

| | askJ2 := NO

| ELSE

| | askJ2 := YES

| END OF IF

ELSE

| IF k003 = 5 OR k003 = EMPTY THEN

| | askJ2 := NO

| END OF IF

END OF IF

IF askJ2 = YES THEN

| Fill code of question FLJW400 executed

**JW400** (Section SectionJ2)

Let's start with any retirement accounts and pensions from work.

(With your help, we hope to streamline and improve our questions about your retirement accounts and pensions. To start, we would like to ask some questions about retirement accounts and pensions you may have with your current job as well as review each of the plans you mentioned in ^z092, ^z093 to be sure we have the right information./With your help, we hope to streamline and improve our questions about your

retirement accounts and pensions./For this reason we would like to ask some questions about retirement accounts and pensions you may currently have.)

Fill code of question FLBusEmp executed

**IF J020 = YES THEN**

**IF z076 = NO OR (z076 = YES AND ((jw416 = 0 OR jw416 = empty) OR jw417 = 5)) THEN**

Fill code of question FLJ848\_ executed

**J848** (FIRM/UNION OFFERS PENSION in section SectionJ2)

(Does your employer or union/Does your business or union) offer retirement accounts, tax deferred retirement savings plans, or pensions to any of its employees?

**IF J848 = YES THEN**

**J849** (PARTICIPATING IN PLAN in section SectionJ2)

Are you included in any such plans?

**IF J849 != YES THEN**

**J326** (ELIGIBLE FOR PENSION in section SectionJ2)

Are you **eligible** to be included in any plans on your current job?

1 Yes

5 No

6 I would be eligible if I worked full-time

**J851** (FIRM HAS PEN ACCOUNT-NOT CONTRIBUTING in section SectionJ2)

Do you have any money in a retirement or tax deferred savings account through this (employer/business) or union?

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**IF z076 = NO AND (J848 = NO OR (J848 = YES AND J849 != YES AND J851 = NO)) THEN**

**ELSEIF z076 = YES AND (jw416 = 0 OR jw416 = empty) AND (J848 = NO OR (J848 = YES AND J849 != YES AND J851 = NO)) THEN**

**ELSEIF A019\_RAge > 79 AND not(J020 = YES OR 1 IN J005) AND (z076 = NO OR (z076 = YES AND (jw416 = 0 OR jw416 = empty))) THEN**

**ELSE**

LOOP FROM 1 TO 50

pensionskip(pensionCnt) := NO  
JW451(pensionCnt) := ACTIVE

IF z076 = YES AND Z506(pensionCnt) = RESPONSE THEN

IF pension\_section(pensionCnt) IN (1,2) THEN

Fill code of question FLPreloadPlan executed  
Fill code of question FLPreloadEmployer executed  
Fill code of question FLPreloadStartYear executed  
Fill code of question FLPreloadEndYear executed  
Fill code of question FLPreloadPlanName executed  
Fill code of question FLJW402 executed

**JW402** (still has plan in section SectionJ2)

(First we would like to go over retirement plans you mentioned in ^z092, ^z093 and then we'll ask about any other plans you may have with your current ^FLBusEmp. According to our records, you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreloadEndYear, which you called your ^FLPreloadPlanName plan./Next, our records show that you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreloadEndYear, which you called your ^FLPreloadPlanName plan.)

Did you ever have such a plan?

1 Yes

5 No, I never had this plan

IF JW402(pensionCnt) = NO OR JW402(pensionCnt) = EMPTY THEN

pensionskip(pensionCnt) := YES  
preload\_JW401(pensionCnt) := NO  
JW451(pensionCnt) := DEAD

ELSE

JW405(pensionCnt) := Z508(pensionCnt)  
JW406(pensionCnt) := Z506(pensionCnt)  
JW407(pensionCnt) := Z507(pensionCnt)  
JW410(pensionCnt) := Z142(pensionCnt)  
JW411(pensionCnt) := Z143(pensionCnt)  
JW412(pensionCnt) := Z510(pensionCnt)  
preload\_JW401(pensionCnt) := YES

```
pensionskip(pensionCnt) := NO
JW451(pensionCnt) := preload_JW451(pensionCnt)
```

END OF IF

ELSEIF z276 != 1 THEN

```
Fill code of question FLPreloadPlan executed
Fill code of question FLPreloadEmployer executed
Fill code of question FLPreloadStartYear executed
Fill code of question FLPreloadEndYear executed
Fill code of question FLPreloadPlanName executed
Fill code of question FLJW402 executed
```

**JW402** (still has plan in section SectionJ2)

(First we would like to go over retirement plans you mentioned in ^z092, ^z093 and then we'll ask about any other plans you may have with your current ^FLBusEmp. According to our records, you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreloadEndYear, which you called your ^FLPreloadPlanName plan./Next, our records show that you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreloadEndYear, which you called your ^FLPreloadPlanName plan.)

Did you ever have such a plan?

1 Yes

5 No, I never had this plan

IF JW402(pensionCnt) = NO OR JW402(pensionCnt) = EMPTY THEN

```
pensionskip(pensionCnt) := YES
preload_JW401(pensionCnt) := NO
JW451(pensionCnt) := DEAD
```

ELSE

```
JW405(pensionCnt) := Z508(pensionCnt)
JW406(pensionCnt) := Z506(pensionCnt)
JW407(pensionCnt) := Z507(pensionCnt)
JW410(pensionCnt) := Z142(pensionCnt)
JW411(pensionCnt) := Z143(pensionCnt)
JW412(pensionCnt) := Z510(pensionCnt)
preload_JW401(pensionCnt) := YES
pensionskip(pensionCnt) := NO
```

JW451(pensionCnt) := ACTIVE

END OF IF

END OF IF

IF not((pension\_section(pensionCnt) IN (1,2) OR z276 != 1) AND JW402(pensionCnt) != YES) THEN

Fill code of question FLPreloadPlan executed  
Fill code of question FLPreloadEmployer executed  
Fill code of question FLPreloadStartYear executed  
Fill code of question FLPreloadEndYear executed  
Fill code of question FLPreloadPlanName executed  
Fill code of question FLJW403 executed  
Fill code of question FLJW403.2 executed

**JW403** (still has plan in section SectionJ2)

(First we would like to go over plans you mentioned in ^z092, ^z093. According to our records, you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreloadEndYear, which you called your ^FLPreloadPlanName plan.

/Next, our records show that you had ^FLPreloadPlan with ^FLPreloadEmployer where you worked from approximately ^FLPreloadStartYear until ^FLPreload-EndYear, which you called your ^FLPreloadPlanName plan.

)Do you still have this plan?

1 Yes

5 No

6 (I never had this plan)

IF JW403(pensionCnt) IN (1,5) THEN

JW451(pensionCnt) := DEAD  
JW405(pensionCnt) := Z508(pensionCnt)  
JW406(pensionCnt) := Z506(pensionCnt)  
JW407(pensionCnt) := Z507(pensionCnt)  
JW410(pensionCnt) := Z142(pensionCnt)  
JW411(pensionCnt) := Z143(pensionCnt)  
JW412(pensionCnt) := Z510(pensionCnt)  
pensionskip(pensionCnt) := NO  
preload\_JW401(pensionCnt) := YES



IF JW403(pensionCnt) = 1 THEN

JW451(pensionCnt) := ACTIVE

END OF IF

**jw\_confirm** (Section SectionJ2)

We have a few questions about your (^Z506(pensionCnt)/(UNKNOWN)) plan to ensure that we have the most up to date information. Note that some of those questions are to confirm the information we have in our records already about this plan. In those cases you may find that answers have already been entered. If they are correct, you can just click 'Next' continue. If not, we ask you to please correct the information and then continue.

ELSEIF JW403(pensionCnt) = 6 THEN

pensionskip(pensionCnt) := YES  
preload\_JW401(pensionCnt) := NO  
JW451(pensionCnt) := DEAD

END OF IF

END OF IF

IF ((z276 = 1 AND JW403(pensionCnt) = 5) OR (((pension\_section(pensionCnt) IN (1,2) AND JW402(pensionCnt) = 1) OR (z276 != 1 AND JW402(pensionCnt) = 1)) AND JW403(pensionCnt) = 5)) AND preload\_JW451(pensionCnt) != DEAD THEN

preload\_JW401(pensionCnt) := YES  
JW451(pensionCnt) := DEAD

**JW404** (what happened to plan in section SectionJ2)

What happened to this plan?

- 1 Withdrew **all** of the money/received full amount as cash settlement or lump-sum
- 9 Withdrew **some** of the money
- 2 Combined with another plan
- 3 Transferred to new employer
- 4 Rolled over into IRA
- 5 Lost all benefits
- 6 Plan frozen or lost some benefits
- 7 Converted to or purchased an annuity
- 8 Receiving regular payment/benefits
- 97 Other

JW404\_asked(pensionCnt) := YES

IF 1 IN JW404(pensionCnt) THEN

    JW427(pensionCnt) := 3  
    JW436(pensionCnt) := YES

END OF IF

IF 9 IN JW404(pensionCnt) THEN

    JW427(pensionCnt) := 3  
    JW437(pensionCnt) := YES

END OF IF

IF 2 IN JW404(pensionCnt) THEN

    JW427(pensionCnt) := 3  
    JW443(pensionCnt) := YES

END OF IF

IF 3 IN JW404(pensionCnt) THEN

    JW427(pensionCnt) := 3  
    JW444(pensionCnt) := YES

END OF IF

IF 4 IN JW404(pensionCnt) THEN

    JW427(pensionCnt) := 3  
    JW439(pensionCnt) := YES

END OF IF

IF 5 IN JW404(pensionCnt) THEN

    JW445(pensionCnt) := YES

END OF IF

```
IF 6 IN JW404(pensionCnt) THEN
```

```
| JW446(pensionCnt) := YES
```

```
END OF IF
```

```
IF 7 IN JW404(pensionCnt) THEN
```

```
| JW426(pensionCnt) := 2  
| JW440(pensionCnt) := YES
```

```
END OF IF
```

```
IF 8 IN JW404(pensionCnt) THEN
```

```
| JW426(pensionCnt) := 1  
| JW434(pensionCnt) := YES
```

```
END OF IF
```

```
IF 97 IN JW404(pensionCnt) THEN
```

```
| JW447(pensionCnt) := YES
```

```
END OF IF
```

```
IF JW404(pensionCnt) = EMPTY THEN
```

```
| JW448(pensionCnt) := YES
```

```
END OF IF
```

```
IF 5 IN JW404(pensionCnt) OR JW404(pensionCnt) = EMPTY THEN
```

```
| pensionskip(pensionCnt) := YES
```

```
END OF IF
```

```
IF JW437(pensionCnt) = YES OR JW446(pensionCnt) = YES OR  
JW447(pensionCnt) = YES THEN
```

```
| JW451(pensionCnt) := ACTIVE
```

| END OF IF

| END OF IF

ELSEIF z076 = YES AND z276 = 1 AND J020 = NO THEN

| pensionskip(pensionCnt) := YES  
| numberofpensions := pensionCnt - 1

ELSEIF z076 = YES AND z276 = 1 AND J849 != 1 AND J851 != 1 AND (jw417 != 1  
OR (J020 = YES AND J848 = response)) THEN

| pensionskip(pensionCnt) := YES  
| numberofpensions := pensionCnt - 1

END OF IF

IF pensionskip(pensionCnt) = NO THEN

| IF (pensionCnt = 1 AND (J849 = YES OR J851 = YES)) OR  
| preload\_JW401(pensionCnt) = YES THEN

| JW401(pensionCnt) := YES

ELSE

| Fill code of question FLJW401 executed

**JW401** (ANY OTHER ACCOUNT in section SectionJ2)

(We have no record that you ever reported a retirement or pension plan, but just so we are clear - - do you have any retirement or tax deferred savings accounts or pensions from any business, employer or union? Please do not include IRAs that are not sponsored by an employer or union./Do you have any other retirement or tax deferred savings accounts or pensions from any previous business, employer or union? Please do not include IRAs that were not sponsored by an employer or union./Earlier you mentioned that you are participating in a retirement account or pension with your current job or union - Is that correct? Please do not include IRAs that are not sponsored by an employer or union./Since ^z092, ^z093, are you now participating in a new retirement or tax deferred savings account or pension offered to you by your current ^FLBusEmp or union? Please do not include IRAs that are not sponsored by an employer or union./Do you have any other retirement or tax deferred savings accounts or pensions with your current job or union that we have not already asked about? Please do not include IRAs that are not sponsored by an employer or union./Do you have any other retirement or tax deferred savings accounts or pensions that we have not already asked

about? Please do not include IRAs that are not sponsored by an employer or union./Do you have any other retirement or tax deferred savings accounts or pensions? Please do not include IRAs that are not sponsored by an employer or union.

If you have another plan with your current job, please tell us about that plan first./Do you have any other retirement or tax deferred savings accounts or pensions that we have not already asked about? Please do not include IRAs that are not sponsored by an employer or union.)

**END OF IF**

**IF JW401(pensionCnt) = YES THEN**

**JW405** (WHO in section SectionJ2)

Who provides this plan?

- 1 Private employer
- 2 Government employer
- 3 My own business
- 4 Union
- 7 Other

Fill code of question FLJW406 executed

**JW406** (PENSION PLAN NAME in section SectionJ2)

(We would like to have a name for this plan in order to ask follow-up questions about it.

What name would help you to distinguish it from any other plans you may have?/Is ^Z506(pensionCnt) a good name or would you like to call it something else?)

We'll use the name you give to identify this plan in our records and for follow-up questions about your plans. Please give it a name that will help you distinguish it from any others you may have.

STRING

**IF JW451(pensionCnt) = ACTIVE THEN**

Fill code of question FLJW407 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**JW407** (TYPE in section SectionJ2)

(What kind of plan is this?/What kind of plan was this?/We have this listed as a ^Z507(pensionCnt). Is that right?)

- 1 401K Plan
- 2 (Defined benefit plan/Defined benefit plan/A defined benefit plan is a retirement plan in which benefits are based on a formula involving age, years of service and salary.)
- 3 (Defined contribution plan/Defined contribution plan/A defined contribution plan is a retirement plan in which benefits are based on how much money has accumulated in a person's retirement account.)
- 4 Supplemental Retirement Account (SRA)
- 5 401A Plan
- 6 403B Plan
- 7 457 Plan
- 8 Thrift/Savings Plan (TSP)
- 9 Profit-sharing Plan
- 10 Employee Stock Ownership Plan (ESOP)
- 11 Money Purchase Plan
- 12 Portable Cash Option Plan
- 13 Employee Stock Purchase Plan (ESPP)
- 14 SEP or SIMPLE Plan
- 15 Combination Plan
- 16 Cash Balance Plan
- 97 Other, please specify:

**JW407\_specify** (TYPE - SPECIFY in section SectionJ2)  
STRING

**END OF GROUP**

- Fill code of question FLW408 executed
- Fill code of question FLJW408.2 executed
- Fill code of question FLJW408.3 executed
- Fill code of question FLJW408.4 executed
- Fill code of question FLJW408.5 executed
- Fill code of question FLJW408.6 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

- JW408\_options** (JOB in section SectionJ2)  
(Who did you work for when you started this plan?/Is ^z141(pensionCnt) the employer associated with this plan?/Is ^z141(pensionCnt) the employer that provided this plan?/Is ^z141(pensionCnt) the business that provided this plan?)
- 1 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(1))
  - 2 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(2))
  - 3 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(3))
  - 4 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(4))
  - 5 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(5))

6 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(6))  
7 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(7))  
8 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(8))  
9 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(9))  
10 (PV WAVE EMPLOYER NAME - USED FOR JW408 LIST(10))  
11 (Current employer/^FLCurrentEmployer)  
12 (Last employer (^kw158))  
13 (Most recent employer (^l008))  
14 (Longest held job with employer (^lw158\_2))  
96 (Current self-employment)  
97 Other, please specify:

**JW408\_temp** (JOB in section SectionJ2)

(Who did you work for when you started this plan?/Is ^z141(pensionCnt) the employer associated with this plan?/Is ^z141(pensionCnt) the employer that provided this plan?/Is ^z141(pensionCnt) the business that provided this plan?)  
STRING

END OF GROUP

IF JW408\_options(pensionCnt) = RESPONSE AND JW408\_options(pensionCnt) < 11 THEN

| JW408(pensionCnt) := Z141(JW408\_options(pensionCnt))

ELSEIF JW408\_options(pensionCnt) = 11 THEN

| JW408(pensionCnt) := JW158  
| JW408\_eleven(pensionCnt) := YES

ELSEIF JW408\_options(pensionCnt) = 12 THEN

| JW408(pensionCnt) := KW158

ELSEIF JW408\_options(pensionCnt) = 13 THEN

| JW408(pensionCnt) := L008

ELSEIF JW408\_options(pensionCnt) = 14 THEN

| JW408(pensionCnt) := LW158\_2

ELSEIF JW408\_options(pensionCnt) = 96 THEN

ELSEIF JW408\_options(pensionCnt) = 97 THEN

JW408(pensionCnt) := JW408\_temp(pensionCnt)

END OF IF

Fill code of question FLBusEmpW410 executed

IF JW408\_options(pensionCnt) = 11 OR (JW408\_options(pensionCnt) = 96) THEN

Fill code of question FLW410 executed

**JW410** (BEGIN in section SectionJ2)

(In what year did you start working for this ^FLBusEmpW410?/Is ^Z142(pensionCnt) the year you started working for this ^FLBusEmpW410?)  
RANGE 1900..(())

ELSE

Fill code of question FLW410 executed

Fill code of question FLW411 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**JW410** (BEGIN in section SectionJ2)

(In what year did you start working for this ^FLBusEmpW410?/Is ^Z142(pensionCnt) the year you started working for this ^FLBusEmpW410?)  
RANGE 1900..(())

**JW411** (END in section SectionJ2)

(In what year did you stop working for this (employer/business/employer/business)?/Is ^Z143(pensionCnt) the year you stopped working for this (employer/business/employer/business)?  
Please just leave empty if you are still working for this (employer/business/employer/business).  
RANGE 1900..(())

END OF GROUP

END OF IF



```

| | | | Fill code of question FLJW412 executed
| | | |
| | | | JW412 (STATE in section SectionJ2)
| | | | (In what state is this ^FLBusEmpW410 located?/Is this ^FLBusEmpW410
| | | | located in ^Z510_string(pensionCnt)?)
| | | |
| | | | END OF IF
| | | |
| | | | ELSE
| | | |
| | | | IF z076 = NO OR (z076 = YES AND (wave1_numberofpensions
| | | | = 0 OR wave1_numberofpensions = EMPTY OR pensionCnt >
| | | | wave1_numberofpensions)) THEN
| | | |
| | | | | numberofpensions := pensionCnt - 1
| | | |
| | | | | END OF IF
| | | |
| | | | | END OF IF
| | | |
| | | | | END OF IF
| | | |
| | | | | END OF LOOP
| | | |
| | | | END OF IF
| | | | END OF IF

```

```

IF askJ2 = YES THEN
| IF z076 = NO AND (J848 = NO OR (J848 = YES AND J849 != YES AND J851 = NO))
| THEN
| |
| | ELSEIF z076 = YES AND (jw416 = 0 OR jw416 = empty) AND (J848 = NO OR (J848 =
| | YES AND J849 != YES AND J851 = NO)) THEN
| | |
| | | ELSEIF A019_RAge > 79 AND not(J020 = YES OR 1 IN J005) AND (z076 = NO OR
| | | (z076 = YES AND (jw416 = 0 OR jw416 = empty))) THEN
| | | |
| | | | ELSE
| | | | | LOOP FROM 1 TO NUMBEROFPENSIONS
| | | |
| | | | | IF pensionskip(pensionCnt) = YES OR 5 IN JW404(pensionCnt) OR (z276
| | | | | = 1 AND JW403(pensionCnt) = 5 AND JW404_asked(pensionCnt) = YES
| | | | | AND JW404(pensionCnt) = empty) OR (pension_section(pensionCnt) IN

```

```
(1,2) AND JW402(pensionCnt) = 1 AND JW403(pensionCnt) = 5 AND
JW404_asked(pensionCnt) = YES AND JW404(pensionCnt) = empty) OR
(z276 != 1 AND JW402(pensionCnt) = 1 AND JW403(pensionCnt) = 5 AND
JW404_asked(pensionCnt) = YES AND JW404(pensionCnt) = empty) THEN
```

```
|
```

```
ELSEIF JW401(pensionCnt) = YES OR (pension_section(pensionCnt) IN (1,2) AND
JW402(pensionCnt) = 1) OR (z276 != 1 AND JW402(pensionCnt) = 1) OR (z276 = 1
AND JW403(pensionCnt) IN (1,5)) THEN
```

```
| Fill code of question FLBusEmpW410 executed
```

```
| IF JW408(pensionCnt) = 11 OR (JW408(pensionCnt) = 96 AND J021=2) OR
| (Z503(pensionCnt) = 1 AND JW417 = 1) THEN
```

```
| | JW452(pensionCnt) := YES
```

```
| ELSE
```

```
| | JW452(pensionCnt) := NO
```

```
| END OF IF
```

```
| Fill code of question FLPlanName executed
```

```
| JW419 (Section SectionJ2)
```

```
| Now we would like to ask some more questions about your
| (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan
| provided by your union/plan provided by ^JW408(pensionCnt)/provided by
| your current employer/plan provided by your current employer/provided
| by your current self-employment/plan provided by your current self-
| employment/provided by a ^JW405(pensionCnt)/plan provided by a
| ^JW405(pensionCnt)/provided by another employer/business/plan provided
| by another employer/business/) plan.(
```

```
| When answering questions about this plan, please include any plan you com-
| bined with or transferred into it.)
```

```
| IF JW405(pensionCnt) = 4 THEN
```

```
| | jw789 (name of union in section SectionJ2)
```

```
| | What is the name of the union that provides this plan?
```

```
| | STRING
```

END OF IF

IF Z503(pensionCnt) = 1 AND JW417 = 5 AND (z276 = 1 AND JW403(pensionCnt) IN (1,2)) THEN

Fill code of question FLJW420 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**jw420** (PREVIOUS PLAN NEW EMPLOYER WHAT HAPPENED in section SectionJ2)

We would like to know what has happened to your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/) plan since you left (^Z141(pensionCnt)/your job). Are you receiving regular payments now, did you leave the money in the account, did you withdraw all or part of the money, did you convert it to or purchase an annuity, did you roll it over into an IRA, or something else? Please choose all that apply.

- 1 Receiving regular payments/benefits
- 2 Left money in the account
- 3 Withdrew **all** of the money/received full amount as cash settlement or lump-sum
- 4 Withdrew **some** of the money
- 5 Rolled over into IRA
- 6 Converted to or purchased an annuity
- 7 Haven't done anything with plan/waiting to become eligible for benefits
- 8 Combined it with another plan
- 9 Transferred to new employer
- 10 Lost all benefits
- 11 Frozen, or lost some benefits
- 97 Other, please specify:

**jw421** (OTHER PREVIOUS PLAN NEW EMPLOYER WHAT HAPPENED in section SectionJ2)

STRING

END OF GROUP

IF 1 IN JW420(pensionCnt) THEN

```
JW426(pensionCnt) := 2  
JW434(pensionCnt) := YES
```

END OF IF

IF 2 IN JW420(pensionCnt) THEN

```
JW435(pensionCnt) := YES
```

END OF IF

IF 3 IN JW420(pensionCnt) THEN

```
JW427(pensionCnt) := 3  
JW436(pensionCnt) := YES
```

END OF IF

IF 4 IN JW420(pensionCnt) THEN

```
JW427(pensionCnt) := 3  
JW437(pensionCnt) := YES
```

END OF IF

IF 5 IN JW420(pensionCnt) THEN

```
JW427(pensionCnt) := 3  
JW439(pensionCnt) := YES
```

END OF IF

IF 6 IN JW420(pensionCnt) THEN

```
JW426(pensionCnt) := 2  
JW440(pensionCnt) := YES
```

END OF IF

IF 7 IN JW420(pensionCnt) THEN

```
JW441(pensionCnt) := YES
```

END OF IF

IF 8 IN JW420(pensionCnt) THEN

| JW427(pensionCnt) := 3  
| JW443(pensionCnt) := YES

END OF IF

IF 9 IN JW420(pensionCnt) THEN

| JW427(pensionCnt) := 3  
| JW444(pensionCnt) := YES

END OF IF

IF 10 IN JW420(pensionCnt) THEN

| JW445(pensionCnt) := YES

END OF IF

IF 11 IN JW420(pensionCnt) THEN

| JW446(pensionCnt) := YES

END OF IF

IF 97 IN JW420(pensionCnt) THEN

| JW447(pensionCnt) := YES

END OF IF

IF JW420(pensionCnt) = EMPTY THEN

| JW448(pensionCnt) := YES

END OF IF

IF Z140(pensionCnt) != 1 AND (1 IN JW420(pensionCnt) OR 4 IN  
JW420(pensionCnt) OR 5 IN JW420(pensionCnt) OR 6 IN JW420(pensionCnt)  
OR 11 IN JW420(pensionCnt) OR 97 IN JW420(pensionCnt) OR

JW420(pensionCnt) = empty) THEN

**jw458** (any money left in section SectionJ2)

Do you have any money left in the (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/) (plan)?

END OF IF

IF JW435(pensionCnt) = YES OR JW437(pensionCnt) = YES OR JW446(pensionCnt) = YES OR JW447(pensionCnt) = YES OR JW448(pensionCnt) = YES THEN

JW451(pensionCnt) := ACTIVE

IF Z140(pensionCnt) != 1 AND (1 IN JW420(pensionCnt) OR 4 IN JW420(pensionCnt) OR 5 IN JW420(pensionCnt) OR 6 IN JW420(pensionCnt) OR 11 IN JW420(pensionCnt) OR 97 IN JW420(pensionCnt) OR JW420(pensionCnt) = empty) THEN

IF JW458(pensionCnt) = NO THEN

JW451(pensionCnt) := DEAD

END OF IF

END OF IF

ELSE

JW451(pensionCnt) := DEAD

END OF IF

END OF IF

IF JW443(pensionCnt) = YES OR JW444(pensionCnt) = YES THEN

Fill code of question FLjw422 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**jw422** (which plan combined/transferred to in section SectionJ2)  
(You mentioned that you had combined this plan with some other plan./You mentioned that you had transferred this plan to a new employer.) Which plan is that in now?

- 1 (PENSION PLAN NAME(1))
- 2 (PENSION PLAN NAME(2))
- 3 (PENSION PLAN NAME(3))
- 4 (PENSION PLAN NAME(4))
- 5 (PENSION PLAN NAME(5))
- 6 (PENSION PLAN NAME(6))
- 7 (PENSION PLAN NAME(7))
- 8 (PENSION PLAN NAME(8))
- 9 (PENSION PLAN NAME(9))
- 10 (PENSION PLAN NAME(10))
- 11 (PENSION PLAN NAME(11))
- 12 (PENSION PLAN NAME(12))
- 13 (PENSION PLAN NAME(13))
- 14 (PENSION PLAN NAME(14))
- 15 (PENSION PLAN NAME(15))
- 16 (PENSION PLAN NAME(16))
- 17 (PENSION PLAN NAME(17))
- 18 (PENSION PLAN NAME(18))
- 19 (PENSION PLAN NAME(19))
- 20 (PENSION PLAN NAME(20))
- 96 IRA:
- 97 Not on the list

**jw423** (ira which plan combined/transferred to in section SectionJ2)  
STRING

**END OF GROUP**

**IF JW422(pensionCnt) = 97 THEN**

**jw424** (plan associated with in section SectionJ2)  
Is this plan associated with an employer of yours?

**END OF IF**

**END OF IF**

IF z506(pensionCnt) = EMPTY AND JW451(pensionCnt) = ACTIVE THEN

Fill code of question FLJ352 executed

**J352** (YEARS IN PLAN in section SectionJ2)

For how many years altogether (have you been/were you) included in this plan?  
RANGE 0..75

END OF IF

IF (z506(pensionCnt) = EMPTY OR (z506(pensionCnt) = RESPONSE AND JW403(pensionCnt) IN (1,2))) AND JW451(pensionCnt) = ACTIVE THEN

IF z506(pensionCnt) = EMPTY OR (z506(pensionCnt) = RESPONSE AND jw452(pensionCnt) = YES AND z276 != 1) THEN

Fill code of question FLJ850\_1 executed

Fill code of question FLJ850\_2 executed

J850\_first := 1

**J850** (GIVEN CHOICE-AUTOMATIC ENROLL in section SectionJ2)

(In some cases, workers who want to participate in their retirement plan have to sign up for the plan. In other cases, workers are automatically enrolled and if they don't want to participate they have to withdraw from the plan.

)(Which is it with your **^FLPlanName?**/Did you have to sign up for your **^FLPlanName** or were you automatically enrolled?)

1 Have to sign up

3 Automatically enrolled

END OF IF

IF (z276 = 1 AND z506(pensionCnt) = response) OR jw435(pensionCnt) = YES OR jw437(pensionCnt) = YES THEN

IF Z503(pensionCnt) = YES AND JW417 = 1 AND z506(pensionCnt) = RESPONSE THEN

**j945** (rules changed in section SectionJ2)

Have the rules that govern your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan



provided by another employer/business/) changed since (January/February/March/April/May/June/July/August/September/October/November/December), (())?

**IF J945(pensionCnt) = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**jw429** (how rules changed in section SectionJ2)

How have the rules changed?

- 1 The contribution levels changed
- 2 The required age or years of service changed
- 3 The benefits formula changed
- 4 The benefits were frozen
- 5 The employer contribution or match rate changed
- 7 Other, please specify:

**jw430** (other how rules changed in section SectionJ2)

STRING

**END OF GROUP**

**END OF IF**

**END OF IF**

**ELSE**

Fill code of question FLJ338\_1 executed

Fill code of question FLJ338\_2 executed

**J338** (PENSION PLAN TYPE-DB OR DC in section SectionJ2)

(Some retirement plans base benefits on a formula involving age, years of service and salary, often called a defined benefit plan. Some plans base benefits on how much money has accumulated in a person's retirement account, often called a defined contribution plan. Other plans use both ways of setting benefits.

)(What type of plan is your **^FLPlanName?**/Is this **^FLPlanName** a defined benefit formula type or a defined contribution account type plan?)

- 1 Defined Benefit (formula)
- 2 Defined Contribution (account)
- 3 Both Types

```

| J338_first := 1
| END OF IF
END OF IF
IF J338(pensionCnt) = 2 OR J338(pensionCnt) = 3 OR JW435(pensionCnt) =
YES OR JW458(pensionCnt) = YES THEN
| JW425(pensionCnt) := 2
ELSE
| IF JW451(pensionCnt) = ACTIVE THEN
| JW425 (MONEY IN ACCOUNT in section SectionJ2)
| Does your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided
| by your union/plan provided by your union/plan provided by
|^JW408(pensionCnt)/provided by your current employer/plan pro-
| vided by your current employer/provided by your current self-
| employment/plan provided by your current self-employment/provided by a
|^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by
| another employer/business/plan provided by another employer/business/)
| have money in an account in your name?
| END OF IF
END OF IF
IF JW425(pensionCnt) IN (1,2) THEN
| JW009 (AMOUNT IN PENSION NOW in section SectionJ2)
| How much is in the (^JW406(pensionCnt)/^JW407(pensionCnt)/provided
| by your union/plan provided by your union/plan provided by
|^JW408(pensionCnt)/provided by your current employer/plan pro-
| vided by your current employer/provided by your current self-
| employment/plan provided by your current self-employment/provided by a
|^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by
| another employer/business/plan provided by another employer/business/)
| account now? If you have any loans against this account, please do not subtract
| them from the total (for example if you have $40000 in your account and a loan of
| $5000 against this account, please report the total of $40000).
| RANGE 0..99999996

```

```

IF JW009(pensionCnt) = EMPTY THEN
  IF X504 = 1 THEN
    | JW010_Unf_Random := 5
  ELSE
    | JW010_Unf_Random := 6
  END OF IF

JW010_Unf (Was it more, about, or less than... in section SectionJ2)
Was it more, about, or less than...

JW010_Unf_Results(pensionCnt) := explodeUnfolding(JW010_Unf(pensionCnt))

IF JW010_Unf_Results(pensionCnt,1) = JW010_Unf_Results(pensionCnt,2)
THEN
  | JW010_Unf_Results(pensionCnt,3) := JW010_Unf_Results(pensionCnt,1)
ELSE
  | JW010_Unf_Results(pensionCnt,3) := empty
END OF IF

ELSEIF JW009(pensionCnt) = RESPONSE AND JW009(pensionCnt) = 0 THEN
  IF JW425(pensionCnt) = 2 THEN
    | JW455(pensionCnt) := 1
  END OF IF
END OF IF

IF Z506(pensionCnt) = RESPONSE AND Z503(pensionCnt) = 1 AND jw417
= 5 THEN
  JW002 (AMOUNT IN PENSION WHEN LEFT in section SectionJ2)
How much money was in your account when you left that (em-
ployer/business/employer/business)?

```

RANGE 0..99999996

IF JW002(pensionCnt) = EMPTY THEN

IF X503 = 1 THEN

| JW003\_Unf\_Random := 5

ELSE

| JW003\_Unf\_Random := 6

END OF IF

**JW003\_Unf** (Was it more, about, or less than... in section SectionJ2)  
Was it more, about, or less than...

JW003\_Unf\_Results(pensionCnt) := explodeUnfolding(JW003\_Unf(pensionCnt))

IF JW003\_Unf\_Results(pensionCnt,1) = JW003\_Unf\_Results(pensionCnt,2)  
THEN

| JW003\_Unf\_Results(pensionCnt,3) := JW003\_Unf\_Results(pensionCnt,1)

ELSE

| JW003\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

END OF IF

IF z076 = NO OR (z076 = YES AND z506(pensionCnt) = empty) THEN

| **J801** (RECEIVE QUARTERLY REPORT in section SectionJ2)  
Do you receive a quarterly report indicating how much money is in your account?

END OF IF

IF JW452(pensionCnt) = YES THEN

```

JW431 (ALLOWED TO BORROW FROM ACCOUNT in section SectionJ2)
Can you borrow against the account?

IF JW431(pensionCnt) = YES THEN

    JW432 (HAVE LOAN AGAINST ACCOUNT NOW in section SectionJ2)
    Do you currently have a loan against the account?

    IF JW432(pensionCnt) = YES THEN

        JW433 (AMOUNT OF LOAN BALANCE in section SectionJ2)
        What is the amount of the loan balance?
        RANGE 0..99999996

    END OF IF

END OF IF

END OF IF

END OF IF

END OF IF

END OF IF

END OF IF

END OF LOOP

END OF IF

END OF IF

IF askJ2 = YES THEN
    IF z076 = NO AND (J848 = NO OR (J848 = YES AND J849 != YES AND J851 = NO))
    THEN
    |
    ELSEIF z076 = YES AND (jw416 = 0 OR jw416 = empty) AND (J848 = NO OR (J848 =
    YES AND J849 != YES AND J851 = NO)) THEN
    |
    ELSEIF A019_RAge > 79 AND not(J020 = YES OR 1 IN J005) AND (z076 = NO OR
    (z076 = YES AND (jw416 = 0 OR jw416 = empty))) THEN
    |
    ELSE
    | LOOP FROM 1 TO NUMBEROFPENSIONS

```

IF pensionskip(pensionCnt) = YES OR 5 IN JW404(pensionCnt) OR (z276 = 1 AND JW403(pensionCnt) = 5 AND JW404\_asked(pensionCnt) = YES AND JW404(pensionCnt) = empty) OR (pension\_section(pensionCnt) IN (1,2) AND JW402(pensionCnt) = 1 AND JW403(pensionCnt) = 5 AND JW404\_asked(pensionCnt) = YES AND JW404(pensionCnt) = empty) OR (z276 != 1 AND JW402(pensionCnt) = 1 AND JW403(pensionCnt) = 5 AND JW404\_asked(pensionCnt) = YES AND JW404(pensionCnt) = empty) THEN

|

ELSEIF JW401(pensionCnt) = YES OR (pension\_section(pensionCnt) IN (1,2) AND JW402(pensionCnt) = 1) OR (z276 != 1 AND JW402(pensionCnt) = 1) OR (z276 = 1 AND JW403(pensionCnt) IN (1,5)) THEN

| IF JW425(pensionCnt) IN (1,2) AND jw452(pensionCnt) = YES THEN

| **J881** (R CONTRIBUTE TO PLAN in section SectionJ2)  
Do you make any contributions toward your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/) plan?

| IF J881(pensionCnt) = YES THEN

| **GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

| **J404** (FORM OF OWN CONTRIBUTION in section SectionJ2)  
How much do you currently contribute to this plan, either as a percent of your pay or as an amount of money per month or year?  
1 Percent of current pay:  
2 Amount of money:

| **J405** (PCT-OWN CONTRIBUTION in section SectionJ2)  
What percent of your pay do you contribute?  
RANGE 0.0..100.0

| **J406** (AMT-OWN CONTRIBUTION in section SectionJ2)  
How much do you contribute?  
RANGE 0..99999996

END OF GROUP

IF J404(pensionCnt) = 1 AND J405(pensionCnt) = EMPTY THEN

|

ELSEIF J404(pensionCnt) = 2 AND J406(pensionCnt) = EMPTY THEN

|

ELSEIF J405(pensionCnt) = RESPONSE OR J406(pensionCnt) = RESPONSE THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J410** (AMT-OWN CONTRIBUTION - PER in section SectionJ2)

Is that per hour, week, every two weeks, per month or per year?

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

5 Twice a month

6 Year

7 Other, please specify:

**J411** (AMT-OWN CONTRIBUTION - PER - SPECIFY in section SectionJ2)

STRING

END OF GROUP

ELSEIF J404(pensionCnt) = EMPTY THEN

IF X502 = 1 THEN

| J407\_Unf\_Random := 5

ELSE

| J407\_Unf\_Random := 6

END OF IF

**J407\_Unf** (Was it more, about, or less than... in section SectionJ2)

Per year, is it more, about, or less than...

```

J407_Unf_Results(pensionCnt) := explodeUnfolding(J407_Unf(pensionCnt))
IF J407_Unf_Results(pensionCnt,1) = J407_Unf_Results(pensionCnt,2) THEN
| J407_Unf_Results(pensionCnt,3) := J407_Unf_Results(pensionCnt,1)
ELSE
| J407_Unf_Results(pensionCnt,3) := empty
END OF IF
END OF IF
END OF IF

```

Fill code of question FLBusEmpJ878 executed

**J878** (FORM OF EMPLOYER CONTRIBUTION in section SectionJ2)  
Does your (employer/business/employer/business) make any contributions toward your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

IF J878(pensionCnt) = YES THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J396** (FORM OF EMPLOYER CONTRIBUTION in section SectionJ2)  
How much does your (employer/business/employer/business) currently contribute, as a percent of your pay, or as an amount of money per month or year?  
1 Percent of current pay:  
2 Amount of money:  
6 Same as my contribution  
7 Half of my contribution

**J397** (PCT-EMPLOYER CONTRIBUTION in section SectionJ2)  
What percent of your pay does your (employer/business/employer/business) contribute?  
RANGE 0.0..100.0



**J398** (AMT EMPLOYER CONTRIBUTION - PER in section SectionJ2)  
How much does your (employer/business/employer/business) contribute?  
RANGE 0..99999996

**END OF GROUP**

IF J396(pensionCnt) = 1 AND J397(pensionCnt) = EMPTY THEN

|

ELSEIF J396(pensionCnt) = 2 AND J398(pensionCnt) = EMPTY THEN

|

ELSEIF J397(pensionCnt) = RESPONSE OR J398(pensionCnt) = RESPONSE  
THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J402** (AMT EMPLOYER CONTRIBUTION - PER in section SectionJ2)

Is that per hour, week, every two weeks, per month or per year?

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

5 Twice a month

6 Year

7 Other, please specify:

**J403** (AMT EMPLOYER CONTRIBUTION - PER - SPECIFY in section  
SectionJ2)

STRING

**END OF GROUP**

ELSEIF J396(pensionCnt) = EMPTY THEN

| IF X510 = 1 THEN

| | J399\_Unf\_Random := 5

| ELSE

| | J399\_Unf\_Random := 6

END OF IF

**J399\_Unf** (Was it more, about, or less than... in section SectionJ2)  
Per year, is it more, about, or less than...

J399\_Unf\_Results(pensionCnt) := explodeUnfolding(J399\_Unf(pensionCnt))

IF J399\_Unf\_Results(pensionCnt,1) = J399\_Unf\_Results(pensionCnt,2) THEN

| J399\_Unf\_Results(pensionCnt,3) := J399\_Unf\_Results(pensionCnt,1)

ELSE

| J399\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

ELSE

| Fill code of question FLJ938 executed

**J938** (EMPLOYER CONTRIBUTE IF R CONTRIBUTE in section SectionJ2)  
(If you were to start to contribute and contributed a sufficient amount, would your ^FLBusEmpJ878 begin contributing to this plan?/If you increased your contribution, would your ^FLBusEmpJ878 begin contributing to this plan?)

END OF IF

END OF IF

IF JW425(pensionCnt) IN (1,2) THEN

**J812** (PCT INVESTED- IN STOCKS in section SectionJ2)  
About what percent of this account balance is in stocks or stock mutual funds?  
RANGE 0.0..100.0

IF J812(pensionCnt) = EMPTY THEN

| IF X501 = 1 THEN

| J813\_Unf\_Random := 5

ELSE

| J813\_Unf\_Random := 6

END OF IF

**J813\_Unf** (Was it more, about, or less than... in section SectionJ2)  
As a percentage, is it more, about, or less than...

J813\_Unf\_Results(pensionCnt) := explodeUnfolding(J813\_Unf(pensionCnt))

IF J813\_Unf\_Results(pensionCnt,1) = J813\_Unf\_Results(pensionCnt,2) THEN

| J813\_Unf\_Results(pensionCnt,3) := J813\_Unf\_Results(pensionCnt,1)

ELSE

| J813\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

**J417** (ABLE TO CHOOSE INVESTMENT OPTIONS in section SectionJ2)  
Are you able to choose how any of the money in your  
(**^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan  
provided by your union/plan provided by ^JW408(pensionCnt)/provided by  
your current employer/plan provided by your current employer/provided  
by your current self-employment/plan provided by your current self-  
employment/provided by a ^JW405(pensionCnt)/plan provided by a  
^JW405(pensionCnt)/provided by another employer/business/plan pro-  
vided by another employer/business/**) is invested?

1 Yes

5 No

6 No, it is in a target or life cycle fund

IF J417(pensionCnt) = YES THEN

**J939** (ABLE TO CHOOSE ALL OR SOME OPTIONS in section SectionJ2)

Are you able to choose how all of the money in this plan is invested, some of it,  
or a little of it?

1 All

2 Some

3 A little

IF z506(pensionCnt) = RESPONSE THEN

**J660** (changed balance in section SectionJ2)

Have you changed the way your balance is invested since (January/February/March/April/May/June/July/August/September/October/November/December), ( )?

IF J660(pensionCnt) = 5 THEN

IF z276 = 1 THEN

|

ELSE

**J661** (EVER CHANGED ALLOCATIONS in section SectionJ2)

Have you ever changed how your balance is invested?

IF J661(pensionCnt) = YES THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J662** (HOW CHANGED ALLOCATIONS in section SectionJ2)

How have you changed the allocation?

Have you changed it to more stocks or stock mutual funds, less stocks, or what?

1 More stocks

3 Less stocks

4 More in target/lifecycle funds

5 Less in target/lifecycle funds

7 Other, please specify:

**J663** (HOW CHANGED ALLOCATIONS - SPECIFY in section SectionJ2)

STRING

END OF GROUP

END OF IF

END OF IF

ELSEIF J660(pensionCnt) = 1 THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J662** (HOW CHANGED ALLOCATIONS in section SectionJ2)

How have you changed the allocation?

Have you changed it to more stocks or stock mutual funds, less stocks, or what?

1 More stocks

3 Less stocks

4 More in target/lifecycle funds

5 Less in target/lifecycle funds

7 Other, please specify:

**J663** (HOW CHANGED ALLOCATIONS - SPECIFY in section SectionJ2)

STRING

**END OF GROUP**

**END OF IF**

**END OF IF**

**END OF IF**

Fill code of question FLProviderName executed

**IF JW405(pensionCnt) IN (2,3,4) OR J812(pensionCnt) = EMPTY THEN**

**I**

**ELSE**

**J664** (MONEY INVESTED IN COMPANY STOCK in section SectionJ2)

Is any money in this account invested in (^JW408(pensionCnt)/your current employer)'s stock?

**IF J664(pensionCnt) = YES THEN**

**J816** (PCT INVESTED-COMPANY STOCKS in section SectionJ2)

About what percent of the total funds in this account is in this employer's stock?

RANGE 0.0..100.0

**IF J816(pensionCnt) = EMPTY THEN**

```

IF X510 = 1 THEN
| J817_Unf_Random := 5
ELSE
| J817_Unf_Random := 6
END OF IF

J817_Unf (Was it more, about, or less than... in section SectionJ2)
As a percentage, is it more, about, or less than...

J817_Unf_Results(pensionCnt) := explodeUnfolding(J817_Unf(pensionCnt))

IF J817_Unf_Results(pensionCnt,1) = J817_Unf_Results(pensionCnt,2)
THEN
| J817_Unf_Results(pensionCnt,3) := J817_Unf_Results(pensionCnt,1)
ELSE
| J817_Unf_Results(pensionCnt,3) := empty
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

IF jw434(pensionCnt) = YES OR jw440(pensionCnt) = YES THEN
| JW426(pensionCnt) := 2

ELSEIF jw451(pensionCnt) = ACTIVE THEN
| JW426 (RECEIVING BENEFITS in section SectionJ2)
Are you currently receiving regular payments from your
(^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan
provided by your union/plan provided by ^JW408(pensionCnt)/provided by
your current employer/plan provided by your current employer/provided

```

by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

END OF IF

IF JW426(pensionCnt) IN (1,2) THEN

IF JW426(pensionCnt) = 1 THEN

JW434(pensionCnt) := YES

END OF IF

IF jw440(pensionCnt) = YES THEN

**JW013** (AMOUNT CONVERTED TO ANNUITY in section SectionJ2)  
You mentioned that you had purchased an annuity.

How much did you convert to an annuity?  
RANGE 0..99999996

**JW108** (STARTED RECEIVING ANNUITY in section SectionJ2)  
Have you started receiving payments from this annuity?

END OF IF

IF JW434(pensionCnt) = YES OR (jw440(pensionCnt) = YES AND jw108(pensionCnt) = 1) THEN

Fill code of question FLW014.2 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**JW014** (AGE WHEN BENEFITS STARTED in section SectionJ2)  
(You mentioned that you were receiving regular payments.

)How old were you when you started receiving payments?  
RANGE 20..95

**JW086** (AGE WHEN BENEFITS STARTED MONTHS in section SectionJ2)

| RANGE 0..12

END OF GROUP

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**JW015** (AMOUNT OF BENEFITS in section SectionJ2)

How much are the payments per month or year?

RANGE 0..99999996

**JW016** (AMOUNT OF BENEFITS - PER in section SectionJ2)

Per:

4 Month

6 Year

7 Other, please specify:

**JW017** (AMOUNT OF BENEFITS - PER - SPECIFY in section SectionJ2)

STRING

END OF GROUP

**JW028** (ADJUSTED FOR COST OF LIVING in section SectionJ2)

Are the payments adjusted for changes in the cost of living?

Fill code of question FLW049.2 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**JW049** (BENEFITS DURATION in section SectionJ2)

Will this payment continue for as long as you live, for a fixed period of time, or what?

1 As long as I live

3 For a fixed time period

4 Until the money runs out

5 (As long as I or my ^FLHWP lives)

7 Other, please specify:

**JW050** (BENEFITS DURATION - SPECIFY in section SectionJ2)

STRING

END OF GROUP

IF JW049(pensionCnt) = 3 THEN



**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**JW051** (BENEFITS DURATION - UNTIL YEAR in section SectionJ2)

What is that time period?

RANGE (())..(())

**JW052** (BENEFITS DURATION - UNTIL AGE in section SectionJ2)

What is that time period?

RANGE 0..95

**JW053** (BENEFITS DURATION - YEARS in section SectionJ2)

What is that time period?

RANGE 0..40

**END OF GROUP**

**END OF IF**

**IF X065ACouplens(1) IN (1,2,3,4) THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**JW054** (R DIE WILL BENEFITS CONTINUE in section SectionJ2)

If you should die, would your (husband/wife/partner/spouse) continue to receive the same payment, get a reduced payment, or would the payments end?

- 1 Same benefit
- 2 Reduced benefit
- 3 No benefit/benefits would end
- 4 Guaranteed for some number of years
- 7 Other, please specify:

**JW055** (R DIE WILL BENEFITS CONTINUE - SPECIFY in section SectionJ2)

STRING

**END OF GROUP**

**END OF IF**

**IF jw436(pensionCnt) = YES THEN**

JW065(pensionCnt) := 2

ELSE

**JW065** (ALLOWED LUMP SUM PAYMENT in section SectionJ2)

Instead of receiving regular payments, could you have received the money all at once?

END OF IF

END OF IF

END OF IF

IF jw436(pensionCnt) = YES OR jw443(pensionCnt) = YES OR jw444(pensionCnt) = YES OR jw439(pensionCnt) = YES OR jw437(pensionCnt) = YES THEN

JW427(pensionCnt) := 3

ELSE

Fill code of question FLW427 executed

**JW427** (WITHDRAWALS/IRREGULAR PAYMENTS in section SectionJ2)

(Have you received any (other) payments, made any withdrawals, or have you rolled over any of the money from this plan into an IRA since you left that ^FLBusEmpW410?/Since ^z092, ^z093 have you received any (other) payments, made any withdrawals, or have you rolled over any of the money from this plan into an IRA?/Have you ever received any (other) payments, made any withdrawals, or have you rolled over any of the money from this plan into an IRA at any time in the past?)

1 Yes, received payments

4 Yes, withdrew money

2 Yes, rolled over into IRA

5 No

3

END OF IF

IF 1 IN JW427(pensionCnt) OR 4 IN JW427(pensionCnt) THEN

JW437(pensionCnt) := YES

END OF IF

IF 2 IN JW427(pensionCnt) THEN

IF z506(pensionCnt) = EMPTY THEN

    | JW439(pensionCnt) := YES

    | END OF IF

END OF IF

IF 1 IN jw427(pensionCnt) OR 2 IN jw427(pensionCnt) OR 3 IN jw427(pensionCnt)  
OR 4 IN jw427(pensionCnt) THEN

    | IF JW436(pensionCnt) = YES OR JW437(pensionCnt) = YES THEN

        | Fill code of question FLJW063 executed

        | **JW063** (TOTAL AMT RECEIVED IN INSTALLMENTS in section SectionJ2)

        | (Not including any money you rolled into an IRA, how much money in total did you receive/withdraw in payments/Not including any money you rolled into an IRA/used to purchase an annuity, how much money in total did you receive/withdraw in payments/Not including any money you rolled into an IRA, how much money in total did you withdraw in payments/Not including any money you rolled into an IRA/used to purchase an annuity, how much money in total did you withdraw in payments/Not including any money you rolled into an IRA, how much money in total did you receive in payments/Not including any money you rolled into an IRA/used to purchase an annuity, how much money in total did you receive in payments/Not including any money you used to purchase an annuity, how much money in total did you receive/withdraw in payments/Not including any money you used to purchase an annuity, how much money in total did you withdraw in payments/Not including any money you used to purchase an annuity, how much money in total did you receive in payments/You indicated that you had withdrawn some money from your ^FLPLanName.

        | /You indicated that you had withdrawn all of the money from your ^FLPLanName.

        | / since you left that ^FLBusEmpW410?/ since ^z092, ^z093?/How much money in total did you receive in payments/How much money in total did you withdraw in payments/How much money in total did you receive/withdraw in payments/Not including any money you rolled into an IRA, how much money in total did you receive in payments/Not including any money you rolled into an IRA, how much money in total did you withdraw in payments/Not including any money you rolled into an IRA, how much money in total did you receive/withdraw in payments)

        | RANGE 0..99999996

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**JW453** (WHAT DONE WITH MONEY WITHDRAWN in section SectionJ2)

What did you do with the money? Please choose all that apply.

- 1 Bought durables (house, car, etc.)
- 2 Spent it
- 3 Saved/invested
- 4 Paid off debt
- 5 Rolled into IRA
- 6 Gave it away
- 7 Other, please specify:

**JW058** (WHAT DONE WITH MONEY WITHDRAWN - SPECIFY in section SectionJ2)

STRING

END OF GROUP

END OF IF

IF JW439(pensionCnt) = YES THEN

**JW099** (PAST PENSION-ROLLED OVER TO IRA-YR in section SectionJ2)

In what year did you roll the money into an IRA?

RANGE 1900..(())

**JW018** (AMOUNT OF PENSION ROLLOVER in section SectionJ2)

How much did the rollover amount to?

RANGE 0..99999996

END OF IF

IF jw444(pensionCnt) = YES OR jw443(pensionCnt) = YES THEN

Fill code of question FLJW100 executed

**JW100** (year combined or transferred in section SectionJ2)

(In what year did you combine the plans?/In what year did you transfer the money?)

RANGE (())..(())

Fill code of question FLJW019 executed

**JW019** (amount combined or transferred in section SectionJ2)

(How much did you combine into the plan?/How much did the transfer amount

| to?)

| END OF IF

END OF IF

IF JW434(pensionCnt) = YES OR JW108(pensionCnt) = 1 OR jw451(pensionCnt) = DEAD OR jw455(pensionCnt) = 1 THEN

| JW428(pensionCnt) := 6

ELSEIF (jw435(pensionCnt) = YES OR jw441(pensionCnt) = YES) AND jw403(pensionCnt) IN (1,2) THEN

| JW428(pensionCnt) := 2

ELSE

**JW428** (CURRENT STATUS EXPECTING in section SectionJ2)

Are you expecting to receive money or benefits at some time in the future from your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

END OF IF

IF JW428(pensionCnt) IN (1,2) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J353\_age** (AGE- EXPECT RECEIVE BENEFITS age in section SectionJ2)

At what age do you expect to start receiving (the rest of the) money or benefits from your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)  
(for example at age 59 and 6 months)?

1 At age:  
96 In years from now

**J353** (AGE- EXPECT RECEIVE BENEFITS in section SectionJ2)

At what age do you expect to start receiving (the rest of the) money or benefits from your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

RANGE (())..96

**J903** (MONTHS- EXPECT RECEIVE BENEFITS in section SectionJ2)

At what age do you expect to start receiving (the rest of the) money or benefits from your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

RANGE 0..12

**J354** (YRS- EXPECT RECEIVE BENEFITS in section SectionJ2)

At what age do you expect to start receiving (the rest of the) money or benefits from your (^JW406(pensionCnt)/^JW407(pensionCnt)/provided by your union/plan provided by your union/plan provided by ^JW408(pensionCnt)/provided by your current employer/plan provided by your current employer/provided by your current self-employment/plan provided by your current self-employment/provided by a ^JW405(pensionCnt)/plan provided by a ^JW405(pensionCnt)/provided by another employer/business/plan provided by another employer/business/)?

RANGE 0..40

**END OF GROUP**

**JW457** (BENEFITS CHANGE AT RETIREMENT in section SectionJ2)

If you continue to work will your benefits at retirement go up or stay the same?

1 Go up

2 Stay the same

**J926** (CASH PAYMENT ALLOWED in section SectionJ2)

Once you start to receive money or benefits, can you take some or all of it as a one time cash payment?

**IF J926(pensionCnt) = YES THEN**

**J927** (ALL CASH ALLOWED in section SectionJ2)

Can you take all of your money or benefits as a one time cash payment or only some?

1 All

5 Only some

**END OF IF**

**J928** (KEEP MONEY ALLOWED in section SectionJ2)

Once you start to receive money or benefits, can you keep some money in your account to take out whenever you want?

**J929** (REGULAR PAYMENTS ALLOWED in section SectionJ2)

Once you start to receive money or benefits, can you receive regular payments on a monthly or yearly basis?

**IF J926(pensionCnt) = 1 AND (J928(pensionCnt) = 5 OR J928(pensionCnt) = empty) AND (J929(pensionCnt) = 5 OR J929(pensionCnt) = empty) THEN**

**J931(pensionCnt) := 1**

**ELSEIF J928(pensionCnt) = 1 AND (J926(pensionCnt) = 5 OR J926(pensionCnt) = empty) AND (J929(pensionCnt) = 5 OR J929(pensionCnt) = empty) THEN**

**J931(pensionCnt) := 2**

**ELSEIF J929(pensionCnt) = 1 AND (J929(pensionCnt) = 5 OR J926(pensionCnt) = empty) AND (J928(pensionCnt) = 5 OR J928(pensionCnt) = empty) THEN**

**J931(pensionCnt) := 3**

**ELSE**

**J931** (BENEFIT WITHDRAW OPTIONS R PLANS in section SectionJ2)

Which of these options do you plan to take advantage of?

1 One time payment

2 Keep money in account to take out later  
3 Regular payments (monthly or annually)

END OF IF

IF 1 IN J931(pensionCnt) THEN

**J363** (LUMP SUM-AMT PLAN TO TAKE in section SectionJ2)  
How much do you plan to take as a one-time payment?  
RANGE 0..99999996

IF J363(pensionCnt) = EMPTY THEN

IF X502 = 1 THEN

| J364\_Unf\_Random := 11

ELSE

| J364\_Unf\_Random := 5

END OF IF

**J364\_Unf** (Was it more, about, or less than... in section SectionJ2)  
Do you expect it to be more, about, or less than...

J364\_Unf\_Results(pensionCnt) := explodeUnfolding(J364\_Unf(pensionCnt))

IF J364\_Unf\_Results(pensionCnt,1) = J364\_Unf\_Results(pensionCnt,2) THEN

| J364\_Unf\_Results(pensionCnt,3) := J364\_Unf\_Results(pensionCnt,1)

ELSE

| J364\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

END OF IF

IF 2 IN J931(pensionCnt) THEN



**J932** (AMOUNT LEAVE IN ACCOUNT in section SectionJ2)  
How much do you expect to leave in the account to take out later?  
RANGE 0..99999996

IF J932(pensionCnt) = EMPTY THEN

IF X506 = 1 THEN

| J933\_Unf\_Random := 11

ELSEIF X506 = 1 THEN

| J933\_Unf\_Random := 5

ELSE

| J933\_Unf\_Random := 6

END OF IF

**J933\_Unf** (Was it more, about, or less than... in section SectionJ2)  
Do you expect it to be more, about, or less than...

J933\_Unf\_Results(pensionCnt) := explodeUnfolding(J933\_Unf(pensionCnt))

IF J933\_Unf\_Results(pensionCnt,1) = J933\_Unf\_Results(pensionCnt,2) THEN

| J933\_Unf\_Results(pensionCnt,3) := J933\_Unf\_Results(pensionCnt,1)

ELSE

| J933\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

END OF IF

IF 3 IN J931(pensionCnt) THEN

| Fill code of question FLJ355 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J947** (FORM OF REGULAR PAYMENTS in section SectionJ2)  
(If you do take it all/For the part that you take) as a regular payment, how much do you expect those payments to be?

- 1 Percent of current pay:
- 2 Amount:

**J356** (PERCENT REGULAR PAYMENTS in section SectionJ2)  
What percent of your final pay at retirement is that?  
RANGE 0..100

**J357** (AMOUNT REGULAR PAYMENTS in section SectionJ2)  
How much do you expect or plan to receive?  
RANGE 0..99999996

**END OF GROUP**

IF J947(pensionCnt) = 1 AND J356(pensionCnt) = EMPTY THEN

|

ELSEIF J947(pensionCnt) = 2 AND J357(pensionCnt) = EMPTY THEN

|

ELSEIF J356(pensionCnt) = RESPONSE OR J357(pensionCnt) = RESPONSE THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J361** (AMOUNT REGULAR PAYMENTS - PER in section SectionJ2)

Is that per month or year?

- 4 Month
- 6 Year
- 7 Other, please specify:

**J362** (AMOUNT REGULAR PAYMENTS - PER - SPECIFY in section SectionJ2)  
STRING

**END OF GROUP**

ELSEIF J947(pensionCnt) = EMPTY THEN

| IF X501 = 1 THEN

| J358\_Unf\_Random := 5

ELSE

| J358\_Unf\_Random := 6

END OF IF

**J358\_Unf** (Was it more, about, or less than... in section SectionJ2)  
Per year, do you expect it to be more, about, or less than...

J358\_Unf\_Results(pensionCnt) := explodeUnfolding(J358\_Unf(pensionCnt))

IF J358\_Unf\_Results(pensionCnt,1) = J358\_Unf\_Results(pensionCnt,2) THEN

| J358\_Unf\_Results(pensionCnt,3) := J358\_Unf\_Results(pensionCnt,1)

ELSE

| J358\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

Fill code of question FLW089.2 executed

**JW089** (BENEFITS DURATION in section SectionJ2)  
Will this payment continue for as long as you live, for a fixed period of time, or what?

- 1 As long as I live
- 3 For a fixed time period
- 4 Until the money runs out
- 5 (As long as I or my ^FLHWP lives)
- 7 Other

IF JW089(pensionCnt) = 3 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

| **JW091** (BENEFITS DURATION - UNTIL YEAR in section SectionJ2)  
What is that time period?  
RANGE (())..(())

| **JW092** (BENEFITS DURATION - UNTIL AGE in section SectionJ2)

OR  
RANGE 0..95

**JW093** (BENEFITS DURATION - YEARS in section SectionJ2)

OR  
RANGE 0..40

END OF GROUP

END OF IF

IF X065ACouplenss(1) IN (1,2,3,4) THEN

**JW094** (R DIE WILL BENEFITS CONTINUE in section SectionJ2)

If you should die, would your (husband/wife/partner/spouse) continue to receive the same benefit, get a reduced benefit, or would the benefits end?

- 1 Same benefit
- 2 Reduced benefit
- 3 No benefit
- 4 Guaranteed for some number of years

END OF IF

END OF IF

END OF IF

ELSE

I

END OF IF

END OF LOOP

END OF IF

**J2ASSIS** (ASSIST SECTION J2 in section SectionJ2)

How often did you receive assistance with giving answers to the questions about your pension(s)?

- 1 Never
- 2 A few times
- 3 Most or all of the time

END OF IF

End of section **SectionJ2**

Start of section **SectionJ3**

```
IF not(J020 = YES OR 1 IN J005) AND z076 = NO AND k003 = 5 THEN  
|  
ELSEIF A028_RInNHome = YES AND A070_NHOwnRent = 5 AND J020 != 1 THEN  
|  
ELSEIF J020 != 1 AND J705 = 1 THEN  
|  
ELSEIF J703 = 1 THEN  
|  
ELSEIF J020 != 1 THEN  
|  
ELSE
```

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J564\_options** (USUAL RETIREMENT AGE options in section SectionJ3)

Next we have a few questions about work and retirement.

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

1 Usual retirement age:

95 No usual age

96 Years of service:

**J564** (USUAL RETIREMENT AGE in section SectionJ3)

Next we have a few questions about work and retirement.

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

RANGE 40..94

**J565** (USUAL # YRS SERVICE- RETIREMENT in section SectionJ3)

RANGE 1..50

**END OF GROUP**

Fill code of question FL\_J566 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J566** (PLANS FOR RETIREMENT in section SectionJ3)

Now we want to ask about your retirement plans.

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?

1 I plan to stop work altogether

- 2 I plan to never stop working
- 3 I have not given it much thought
- 4 I have no current plans, continue as is
- 5 I plan to reduce work hours
- 6 I plan to change the kind of work
- 7 (I plan to work for myself)
- 8 I plan to work until my health fails
- 97 Other, please specify:

**J567** (PLANS FOR RETIREMENT - SPECIFY in section SectionJ3)  
STRING

END OF GROUP

IF 1 IN J566 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J568\_age** (PLAN TO STOP WORKING-YR age in section SectionJ3)  
At what age do you plan to stop working?

- 1 Age:
- 96 Year:
- 95 Never

**J568** (PLAN TO STOP WORKING-AGE in section SectionJ3)  
At what age do you plan to stop working?  
RANGE (())..94

**J569** (PLAN TO STOP WORKING-YR in section SectionJ3)  
RANGE (())..(())

END OF GROUP

END OF IF

IF 3 IN J566 OR 4 IN J566 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J570\_age** (PLAN TO STOP WORKING-YR age in section SectionJ3)  
At what age do you think you will stop working?

- 1 Age:
- 96 Year:
- 95 Never

**J570** (THINK STOP WORKING-AGE in section SectionJ3)  
At what age do you think you will stop working?

RANGE ()..94

**J571** (THINK STOP WORKING-YR in section SectionJ3)

RANGE ()..()

END OF GROUP

END OF IF

IF 5 IN J566 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J572.age** (START WORKING FEWER HRS age in section SectionJ3)

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

1 Age:

96 Year:

95 Never

**J572** (START WORKING FEWER HRS-AGE in section SectionJ3)

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

RANGE ()..94

**J573** (START WORKING FEWER HRS-YR in section SectionJ3)

RANGE ()..()

END OF GROUP

END OF IF

IF 6 IN J566 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J574.age** (CHANGE KIND OF WORK age in section SectionJ3)

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

1 Age:

96 Year:

95 Never

**J574** (CHANGE KIND OF WORK-AGE in section SectionJ3)

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

RANGE ()..94

**J575** (CHANGE KIND OF WORK-YR in section SectionJ3)

RANGE ()..()

END OF GROUP

END OF IF

IF 7 IN J566 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J576.age** (START SELF-EMPLOYMENT-AGE age in section SectionJ3)

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

1 Age:

96 Year:

95 Never

**J576** (START SELF-EMPLOYMENT-AGE in section SectionJ3)

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

RANGE (())..94

**J577** (START SELF-EMPLOYMENT-YR in section SectionJ3)

RANGE (())..(())

END OF GROUP

END OF IF

IF (1 IN J566 OR 2 IN J566 OR 3 IN J566 OR 4 IN J566 OR 8 IN J566) OR ((5 IN J566 AND J572.age = 95) OR (6 IN J566 AND J574.age= 95) OR (7 IN J566 AND J576.age = 95)) THEN

ELSE

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J959.never** (STOP WORKING PERMANENTLY-AGE in section SectionJ3)

At what age do you think you will stop working permanently?

1 Age:

96 Year:

95 Never

**J959** (STOP WORKING PERMANENTLY-AGE in section SectionJ3)

At what age do you think you will stop working permanently?

RANGE (())..94

**J960** (STOP WORKING PERMANENTLY-YR in section SectionJ3)

RANGE (())..(())

END OF GROUP

END OF IF

END OF IF



IF not(J020 = YES OR 1 IN J005) AND z076 = NO AND k003 = 5 THEN

ELSE

**J578** (CONSIDER SELF RETIRED in section SectionJ3)

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

J613.branch := 0

IF J578 = RESPONSE THEN

IF J578 = 5 OR (J578 = 1 AND (Z134 = 1 OR (Z124 = 1 AND Z134 = EMPTY))) OR (J578 = 3 AND Z134 = 3) OR J018 = RESPONSE THEN

ELSEIF J578 = 7 THEN

J613.branch := 1

ELSE

Fill code of question FLJ580 executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J580** (MO-RETIRED in section SectionJ3)

In what month and year did you (partly/completely) retire?

**J581** (YR-RETIRED in section SectionJ3)

RANGE 1900..(())

END OF GROUP

END OF IF

Fill code of question FLJ709 executed

**J709** (THINK ABOUT RETIREMENT BF RETIRE in section SectionJ3)

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

```
IF A028_RInNHome = YES AND A070_NHOwnRent = NO AND J020 != 1 THEN
| J613_branch := 1
ELSEIF J705 = 1 AND J578 != 1 THEN
| J613_branch := 1
ELSEIF J703 = 1 THEN
| J613_branch := 1
ELSEIF J578 = 5 OR (J578 = 3 AND (Z134 = 3 OR (Z124 = 1 AND Z134 = EMPTY)))
THEN
|
ELSE
| IF J578 != 1 OR !(Z134 = 1 OR (Z124 = 1 AND Z134 = EMPTY)) THEN
|   Fill code of question FLJ580 executed
|
|   J583 (WANTED/FORCED TO RETIRE in section SectionJ3)
|   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
|
| END OF IF
|
| IF J578 = 1 THEN
|   J584 (HOW SATISFIED W/ RETIREMENT in section SectionJ3)
|   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
|
|   IF z076 = NO OR (z076 = YES AND J705 != 1) THEN
|     J585 (RETIREMENT YRS BETTER/SAME in section SectionJ3)
|     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
|
|   ELSEIF Z076 = YES AND J705 = 1 THEN
|     J613_branch := 1
```

```

END OF IF
IF Z134 = 1 OR (Z124 = 1 AND Z134 = empty) THEN
| J613_branch := 1
ELSE
| GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
|
| J586 (Section SectionJ3)
| Below is a list of reasons why some people retire. Please indicate whether, for
| you, these were very important reasons for retirement, moderately important,
| somewhat important, or not important at all.
|
| SUBGROUP OF QUESTIONS
|
| J588_1 (RETIRE POOR HEALTH in section SectionJ3)
| Poor health.
|
| J588_2 (RETIRE WANTED TO DO OTHER THINGS in section SectionJ3)
| Wanted to do other things.
|
| J588_3 (RETIRE DIDNT LIKE THE WORK in section SectionJ3)
| Didn't like the work.
|
| J588_4 (RETIRE WANTED TO SPENT MORE TIME WITH FAMILY in
| section SectionJ3)
| Wanted to spend more time with my family.
|
| END OF SUBGROUP
|
| END OF GROUP
| END OF IF
END OF IF
END OF IF
END OF IF
IF J613_branch = 1 THEN
|
| ELSEIF Z076 = YES THEN
|
| ELSE
| Fill code of question FLJ589 executed
|
| GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

```

**J589** (Section SectionJ3)

Now we are going to present you a list of things that some people say are good about retirement.

For each one, please indicate if, (during your retirement, it has been/for you, they are) very important, moderately important, somewhat important, or not important at all.

**SUBGROUP OF QUESTIONS**

**J591\_1** (GOOD RETIRE OWN BOSS in section SectionJ3)

Being your own boss.

**J591\_2** (GOOD RETIRE TAKE EASY in section SectionJ3)

Being able to take it easy.

**J591\_3** (GOOD RETIRE TRAVEL in section SectionJ3)

Having the chance to travel.

**END OF SUBGROUP**

**END OF GROUP**

Fill code of question FLJ592 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J592** (Section SectionJ3)

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

Please indicate if(, during your retirement, they have bothered you a lot, somewhat, a little, or not at all./ they worry you a lot, somewhat, a little, or not at all.)

**SUBGROUP OF QUESTIONS**

**J594\_1** (BAD RETIRE NOT PRODUCTIVE/USEFUL in section SectionJ3)

Not doing anything productive or useful.

**J594\_2** (BAD RETIRE ILLNESS/DISABILITY in section SectionJ3)

The possibility of illness or disability.

**J594\_3** (BAD RETIRE NOT ENOUGH INCOME in section SectionJ3)

Not having enough income to get by.

| | END OF SUBGROUP

| | END OF GROUP

| | END OF IF

| | IF Z076 = NO THEN

| | ELSEIF J020 = 5 AND z123 != 1 AND (J596 = 5 OR j596 = empty) THEN

| | ELSEIF J703 = 1 THEN

| | ELSEIF J021 = 2 AND z076 = YES AND z136 = 2 THEN

| | ELSEIF z076 = YES AND z136 = 2 AND j020 != 1 AND j596 != 1 THEN

| | ELSEIF z076 = YES AND z123 != 1 AND j021 = 2 AND j596 != 1 THEN

| | ELSE

| | **J613** (offered early retirement window in section SectionJ3)

| | 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 (January/February/March/April/May/June/July/August/September/October/November/December), (( ))?

| | IF J613 = YES THEN

| | **J614** (NUMBER OF SPECIAL INCENTIVES in section SectionJ3)

| | How many of these special incentive offers have you received since (January/February/March/April/May/June/July/August/September/October/November/December), (( ))?

| | NUMBER (NO DECIMALS ALLOWED)

| | IF J614 > 0 THEN

| | tempcnt := 0

| | LOOP FROM 1 TO J614

| | IF cnt = 1 OR cnt = J614 THEN

| | tempcnt := tempcnt + 1

| | Fill code of question FLJ616 executed

| | GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J616** (month special incentive offered in section SectionJ3)  
In what month and year was the (first/second/last) special incentive offered?

**J617** (year special incentive offered in section SectionJ3)  
RANGE ()..(())

END OF GROUP

IF J045 IN (1,3) THEN

|

ELSE

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J619** (who working for in section SectionJ3)  
Which employer were you working for at the time?  
1 (PREVIOUS EMPLOYER NAME())  
2 (EMPLOYER NAME())  
7 Other, please specify:

**J620** (other who working for in section SectionJ3)  
STRING

END OF GROUP

END OF IF

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J621** (type of special incentive in section SectionJ3)  
Was the special incentive a cash bonus, improved pension benefits or what?  
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, please specify:

**J622** (other type of incentive in section SectionJ3)  
STRING

END OF GROUP

IF 1 IN J621(tempcnt) THEN

**J623** (amount cash bonus in section SectionJ3)  
How much did the cash bonus offer amount to?

IF J623(tempcnt) = EMPTY THEN

IF X506 = 1 THEN

| J624\_Unf\_Random := 5

ELSE

| J624\_Unf\_Random := 6

END OF IF

**J624\_Unf** (Was it more, about, or less than... in section SectionJ3)  
Was it more, about, or less than...

J624\_Unf(pensionCnt) := explodeUnfolding(J624\_Unf(pensionCnt))

IF J624\_Unf\_Results(pensionCnt,1) = J624\_Unf\_Results(pensionCnt,2)  
THEN

| J624\_Unf\_Results(pensionCnt,3) := J624\_Unf\_Results(pensionCnt,1)

ELSE

| J624\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

END OF IF

IF 2 IN J621(tempcnt) THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J627** (amount extra pension benefit in section SectionJ3)  
How much did the extra pension benefit offer amount to?

**J631** (AMOUNT PER in section SectionJ3)

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

2 Week

4 Month

6 Year

95 Lump sum

97 Other, please specify:

**J632** (other per extra benefit in section SectionJ3)

STRING

END OF GROUP

IF J627(tempcnt) = EMPTY THEN

IF X506 = 1 THEN

| J628\_Unf\_Random := 5

ELSE

| J628\_Unf\_Random := 6

END OF IF

**J628\_Unf** (Was it more, about, or less than... in section SectionJ3)

Was it more, about, or less than...

J628\_Unf(pensionCnt) := explodeUnfolding(J628\_Unf(pensionCnt))

IF J628\_Unf\_Results(pensionCnt,1) = J628\_Unf\_Results(pensionCnt,2)

THEN

| J628\_Unf\_Results(pensionCnt,3) := J628\_Unf\_Results(pensionCnt,1)

ELSE

| J628\_Unf\_Results(pensionCnt,3) := empty

END OF IF

END OF IF

END OF IF



IF 4 IN J621(tempcnt) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J633\_options** (age temporary insurance was offered in section SectionJ3)

Until what age was the temporary medical insurance offered?

1 Age:

95 Number of years:

96 Year:

**J633** (age temporary insurance was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

**J634** (number of years temporary insurance was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

**J635** (year temporary insurance was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

END OF IF

IF 5 IN J621(tempcnt) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J636** (amount temporary cash benefit in section SectionJ3)

How much did the temporary cash benefits offer amount to?

**J637** (AMOUNT PER in section SectionJ3)

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

2 Week

4 Month

6 Year

95 Lump sum

97 Other, please specify:

**J638** (other per cash benefit in section SectionJ3)

STRING

END OF GROUP

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J639\_options** (age temporary cash benefits was offered in section SectionJ3)

Until what age was the temporary cash benefit offered?

1 Age:

95 Number of years:

96 Year:

**J639** (age temporary cash benefits was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

**J640** (number of years temporary cash benefit was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

**J641** (year temporary cash benefit was offered in section SectionJ3)

NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

END OF IF

IF 6 IN J621(tempcnt) THEN

**J642** (number of years offered in section SectionJ3)

How many years of service credit were you offered?

NUMBER (NO DECIMALS ALLOWED)

END OF IF

IF 7 IN J621(tempcnt) THEN

Fill code of question FLJ643 executed

**J643** (amount incentive offer in section SectionJ3)

(Altogether, how much did the incentive offer amount to?/Not including/ and / the cash bonus/ improved pension benefits/ permanent medical insurance/ temporary medical insurance/ temporary cash benefit/ additional years of service credited/, what was the value of the other part of the ^FLJ616 incentive offer?/,)

NUMBER (NO DECIMALS ALLOWED)

```

END OF IF

J644 (accepted incentive in section SectionJ3)
Did you accept the incentive and leave that employer?

IF J644(tempcnt) = YES THEN

    J645 (special incentive important in section SectionJ3)
    Was the special incentive important in your decision, or would you probably
    have left at about that time anyway?
    1 Important in making decision
    5 Would have left anyway

ELSE

    J646 (offered twice as much in section SectionJ3)
    If you had been offered twice as much (to leave) at that time, would you have
    done so?

END OF IF

END OF IF

END OF LOOP

END OF IF

END OF IF

END OF IF

IF Z076 = YES THEN
|
ELSEIF K003 = YES AND (K004 = EMPTY OR K005 = empty) THEN
|
ELSE
    IF (K004 = RESPONSE AND ((FLCurrentYear-K004) < 21)) OR (K005 = RESPONSE
    AND K005 < 21) THEN
        L040 (OFFERED EARLY OUT WINDOWS in section SectionL)
        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?

        IF L040 = YES THEN

```

**L041** (# OF EARLY OUT WINDOWS OFFERED in section SectionL)  
How many times has this happened?  
RANGE 0..99999996

**IF L041 > 0 THEN**

L043\_max := L041

**IF L043\_max > 2 THEN**

L043\_max := 2

**END OF IF**

**LOOP FROM 1 TO L043.MAX**

Fill code of question FLL043 executed

**L043** (YR EARLY OUT WINDOW OFFERED in section SectionL)  
When was the (first/second/last) special incentive offered?  
RANGE 1900..(())

**L044** (WHICH EMPLOYER OFFERED EARLY OUT WINDOW in section SectionL)  
Which employer were you working for at the time?  
STRING

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**L045** (TYPE EARLY OUT WINDOW in section SectionL)  
Was the special incentive a cash bonus, improved pension benefits, or what?  
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, please specify:

**L046** (TYPE EARLY OUT WINDOW- SPECIFY in section SectionL)  
STRING

**END OF GROUP**

**IF 1 IN L045(cnt) THEN**

**L047** (EARLY OUT WINDOW- AMOUNT CASH BONUS in section SectionL)  
How much did the cash bonus offer amount to?  
RANGE 0..99999996

END OF IF

IF 2 IN L045(cnt) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**L048** (AMOUNT EXTRA PENSION BENEFITS in section SectionL)  
How much did the extra pension benefits offer amount to?  
RANGE 0..99999996

**L049** (AMOUNT EXTRA PENSION BENEFITS-PER in section SectionL)  
Per:  
2 Week  
4 Month  
6 Year  
95 Lump sum  
97 Other, please specify:

**L050** (AMOUNT EXTRA PENSION BENEFITS - SPECIFY in section SectionL)  
STRING

END OF GROUP

END OF IF

IF 4 IN L045(cnt) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**L051\_options** (TEMP MEDICAL INSURANCE- UNTIL AGE in section SectionL)  
Until what age was the temporary medical insurance offered?  
1 Age:  
95 Number of years:  
96 Year:

**L051** (TEMP MEDICAL INSURANCE- UNTIL AGE in section SectionL)  
Until what age was the temporary medical insurance offered?

RANGE 35..80

**L052** (TEMP MEDICAL INSURANCE- NUMBER OF YEARS in section SectionL)  
NUMBER (NO DECIMALS ALLOWED)

**L053** (TEMP MEDICAL INSURANCE- YEAR in section SectionL)  
NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

END OF IF

IF 5 IN L045(cnt) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**L054** (AMOUNT TEMP CASH BENEFIT in section SectionL)  
How much did the temporary cash benefits amount to?  
RANGE 0..99999996

**L055** (AMOUNT TEMP CASH BENEFIT- PER in section SectionL)  
Per:  
2 Week  
4 Month  
6 Year  
95 Lump sum  
97 Other, please specify:

**L055\_other** (AMOUNT TEMP CASH BENEFIT- PER - SPECIFY in section SectionL)  
STRING

END OF GROUP

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**L056\_options** (RECD TEMP CASH UNTIL-AGE in section SectionL)  
Until what age was the temporary cash benefit offered?  
1 Age:  
95 Number of years:  
96 Year:

**L056** (RECD TEMP CASH UNTIL-AGE in section SectionL)  
Until what age was the temporary cash benefit offered?

RANGE 0..9223372036854775807

**L057** (RECD TEMP CASH NUMBER OF YEARS in section SectionL)  
NUMBER (NO DECIMALS ALLOWED)

**L058** (RECD TEMP CASH YEAR in section SectionL)  
NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

END OF IF

IF 6 IN L045(cnt) THEN

**L059** (# YRS SERVICE CREDIT in section SectionL)  
How many years of service credit were you offered?  
RANGE 1..20

END OF IF

IF 7 IN L045(cnt) THEN

Fill code of question FLL060 executed

**L060** (AMOUNT OF OTHER INCENTIVE OFFERS in section SectionL)  
(Altogether, how much did the incentive offer amount to?/Not including/the cash bonus/improved pension benefits/permanent medical insurance/temporary medical insurance/temporary cash benefit/additional years of service credited/and/what was the value of the other part of the ^FLL043 incentive offer?/)  
RANGE 0..99999996

END OF IF

**L061** (ACCEPT INCENTIVES AND LEAVE in section SectionL)  
Did you accept the incentive and leave that employer?

IF L061(cnt) = YES THEN

**L062** (IMPORTANCE OF INCENTIVE IN LEAVING in section SectionL)  
Was the special incentive important in your decision, or would you probably have left at about that time anyway?  
1 Important in my decision  
5 Would have left anyway

ELSE

**L063** (LEAVE IF INCENTIVE TWICE AMOUNT in section SectionL)

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

END OF IF

END OF LOOP

END OF IF

END OF IF

END OF IF

**L110** (EVER WORKED MORE THAN YEAR NOT COVERED BY SOCIAL SECURITY in section SectionJ3)

(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?

IF L110 = YES THEN

**L111** (NUMBER OF YEARS WORKED NOT COVERED BY SOCIAL SECURITY in section SectionJ3)

About how many years did you work on jobs that were not covered by Social Security? NUMBER (NO DECIMALS ALLOWED)

END OF IF

END OF IF

END OF IF

**J478** (CURRENTLY RECV SOC SEC INCOME in section SectionJ3)

Do you currently receive any income from Social Security?

IF J478 = NO THEN

**J479** (EXPECT FUTURE SOC SEC BENEFITS in section SectionJ3)

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

IF J479 = YES THEN

**J719** (EXPECT FUTURE SOC SEC BENEFITS in section SectionJ3)

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 My own record only

2 My (current, previous or late) spouse's record only

3 Both records



**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J480** (AGE EXPECT TO COLLECT SOC SEC INCOME in section SectionJ3)

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

RANGE (())..120

**J910** (MONTHS- EXPECT RECV BENEFITS in section SectionJ3)

RANGE 0..12

**END OF GROUP**

**IF J480 = RESPONSE THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**J481** (SOC SEC AMT PRESENT VALUE in section SectionJ3)

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

RANGE 0..999996

**J485** (SOC SEC AMT PRESENT VALUE- PER in section SectionJ3)

Per:

2 Week

3 Every two weeks/bi-weekly

4 Month

6 Year

7 Other, please specify:

**J486** (SOC SEC AMT PRESENT VALUE- PER - SPECIFY in section SectionJ3)

STRING

**END OF GROUP**

**IF J481 = EMPTY THEN**

**IF X509 = 1 THEN**

| J482\_Unf\_Random := 5

**ELSE**

| J482\_Unf\_Random := 6

**END OF IF**

**J482\_Unf** (Was it more, about, or less than... in section SectionJ3)

Per month, do you expect it to be more, about, or less than...

J482\_Unf\_Results := explodeUnfolding(J482\_Unf)

```

IF J482_Unf_Results(1) = J482_Unf_Results(2) THEN
| J482_Unf_Results(3) := J482_Unf_Results(1)
ELSE
| J482_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

```

```

IF J480 != 62 AND A019_RAge < 63 THEN

```

```

| Fill code of question FLJ487 executed

```

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**J487** (AMT SOC SEC BENEFITS- AT AGE 62 in section SectionJ3)

If you were (to retire at age 62 and collect benefits/to start collecting benefits at age 62/to retire now and collect benefits/to start collecting benefits now), what do you think your Social Security benefits would be in today's dollars?

RANGE 0..999996

**J491** (AMT SOC SEC BENEFITS- AT AGE 62- PER in section SectionJ3)

Per:

2 Week

3 Every two weeks/bi-weekly

4 Month

6 Year

7 Other, please specify:

**J492** (AMT SOC SEC BENEFITS- AT AGE 62- PER - SPECIFY in section SectionJ3)

STRING

#### END OF GROUP

```

IF J487 = EMPTY THEN

```

```

| IF X510 = 1 THEN

```

```

| | J488_Unf_Random := 5

```

```

ELSE

```

```

| | J488_Unf_Random := 6

```

```

END OF IF

```

**J488\_Unf** (Was it more, about, or less than... in section SectionJ3)

Per month, do you expect it to be more, about, or less than...

```

J488_Unf_Results := explodeUnfolding(J488_Unf)

IF J488_Unf_Results(1) = J488_Unf_Results(2) THEN
| J488_Unf_Results(3) := J488_Unf_Results(1)
ELSE
| J488_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

SSNRA := getSSNRA(dateofbirth_year)

IF A019_RAge > SSNRA OR J480 = SSNRA THEN
|
ELSE
| Fill code of question FLJ493 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

J493 (AMT SOC SEC BENES- AGE 62- PER SPECIFY in section SectionJ3)
If you were (to retire at your Social Security normal retirement age and collect
benefits/to start collecting benefits at your Social Security normal retirement age/to
retire now and collect benefits/to start collecting benefits now), what do you think
your Social Security benefits would be in today's dollars?
RANGE 0..999996

J497 (AMT SOC SEC BENES- NORMAL RET AGE-PER in section SectionJ3)
Per:
2 Week
3 Every two weeks/bi-weekly
4 Month
6 Year
7 Other, please specify:

J498 (AMT SOC SEC BENES- NORM RET AGE PER SP in section Sec-
tionJ3)
STRING

END OF GROUP

IF J493 = EMPTY THEN
| IF X501 = 1 THEN
| J494_Unf_Random := 5
ELSE

```

```

| J494_Unf_Random := 6
| END OF IF

J494_Unf (Was it more, about, or less than... in section SectionJ3)
Per month, do you expect it to be more, about, or less than...

J494_Unf_Results := explodeUnfolding(J494_Unf)

IF J494_Unf_Results(1) = J494_Unf_Results(2) THEN
| J494_Unf_Results(3) := J494_Unf_Results(1)
ELSE
| J494_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF
END OF IF

```

**J3ASSIS** (ASSIST SECTION J3 in section SectionJ3)  
How often did you receive assistance with giving answers to the questions about your retirement?  
1 Never  
2 A few times  
3 Most or all of the time

End of section **SectionJ3**

Start of section **PreloadM**

```

IF Z076 = 1 THEN
| Z219 := getHRSPreloadWave1(3,"M502")
| Z099 := getHRSPreloadWave1(3,"M654")
| Z100 := getHRSPreloadWave1(3,"M660")
| Z118 := getHRSPreloadWave1(3,"M648")
| Z119 := getHRSPreloadWave1(3,"M666")
END OF IF

```

End of section **PreloadM**

Start of section **SectionM**

```

IF Z076 = 1 THEN

```

**M002** (IF HEALTH AFFECTS WORK in section SectionM)  
Now we want to ask how your health affects paid work activities.

Do you have any impairment or health problem that limits the kind or amount of paid work you can do?

**IF M002 = YES THEN**

**IF A019\_RAge < 70 THEN**

**M003** (HEALTH PROB AFFECT- CAUSE PROBLEM in section SectionM)  
What health condition causes this impairment or problem?  
STRING

**M004** (TEMPORARY CONDITION in section SectionM)  
Is this a temporary condition that will last for less than three months?  
1 Yes, temporary  
5 No, not temporary

**IF M004 = YES THEN**

**M005** (HAD CONDITION BEFORE in section SectionM)  
Have you had this condition before?

**END OF IF**

**END OF IF**

**ELSE**

**M006** (LIMIT HOUSEWRK in section SectionM)  
Does any impairment or health problem limit the kind or amount of work you can do around the house?

**IF M006 != YES THEN**

**M007** (LIMIT IN ANY WAY in section SectionM)  
Are you limited in any way in activities because of an impairment or problem?

**END OF IF**

**END OF IF**

**IF Z122 = 1 OR M002 = 1 THEN**

**IF M002 = 1 AND (Z122 != 1 OR M004 = 1) THEN**

**IF J020 != 1 THEN**

**M008** (LIMITATION PROHIBITS WORKING in section SectionM)  
Does this limitation keep you from working altogether?

**END OF IF**

**IF A019\_RAge < 70 THEN**

**IF M008 = 5 THEN**

**M011** (CAN WORK FULL OR PART TIME in section SectionM)

Are you able to work full-time or can you work only part-time?

1 Full time

2 Part time

**M013** (ABLE TO RESUME SAME TYPE OF WORK in section SectionM)

Are you now able to do the same kind of work you did before your health limitation began?

END OF IF

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**M014\_options** (IMPAIRMT BEGIN INTERFERE WORK-YR in section SectionM)

In what year did it begin to interfere with your work?

1 Year:

9995 Doesn't interfere with work

**M014** (IMPAIRMT BEGIN INTERFERE WORK-YR in section SectionM)

In what year did it the impairment or health problem begin to interfere with your work?

RANGE 1900..(())

END OF GROUP

IF (M014\_options != 9995 AND M014 = RESPONSE AND (FLCurrentYear - M014) < 2) THEN

**M015** (IMPAIRMT BEGIN INTERFERE WORK-MO in section SectionM)

In what month was that?

END OF IF

IF M004 != 1 AND M014\_options != 9995 AND Z219 != 1 THEN

**M018** (EXPECT CONDITION TO IMPROVE in section SectionM)

Do you expect this condition to improve enough within the next few years so that it will no longer be a problem for your working?

END OF IF

**M020** (IMPAIRMENT RESULT OF INJURY in section SectionM)

Was the impairment of health problem you just mentioned the result of an accident or injury?

IF M020 = YES THEN

**M021** (WHERE INJURY OCCURRED in section SectionM)

Did the accident occur at work, at home, or somewhere else?

1 Work

- 2 Home
- 3 Somewhere else

END OF IF

**M023** (CAUSED BY WRK in section SectionM)

Was this impairment or health problem in any way caused by the nature of your work?

IF Z122 != 1 THEN

IF M021 = 1 THEN

M024 := 1

ELSE

**M024** (EMPLOYED AT TIME LIMITATN BEGAN in section SectionM)

Were you employed at the time your health began to limit your ability to work?

END OF IF

IF M024 = YES THEN

Fill code of question FL.m026.1 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**M026** (WHICH COMPANY/ORG in section SectionM)

Which company or organization did you work for at that time?

1 (^a508)

2 (())

6 Self-employed

7 Other, please specify:

**M027** (WHICH COMPANY/ORG - SPECIFY in section SectionM)

STRING

END OF GROUP

END OF IF

IF M027 = RESPONSE THEN

employercount := 1

**MW200** (SELF/OTHER EMPLOYED in section SectionM)

Before your health began to limit your ability to work, were you working for someone else, were you self-employed, or what?

1 Someone else

2 Self-employed

**MW202** (KIND OF BUSINESS/INDUSTRY in section SectionM)

What kind of business or industry did you work in, that is, what did they make or do at the place where you worked?

STRING

**MW201** (TYPE OF WORK in section SectionM)

What sort of work did you do on that job?

STRING

**MW203** (NUMBER OF EMPLOYEES in section SectionM)

About how many employees work for that company or organization at all locations?

NUMBER (NO DECIMALS ALLOWED)

**IF MW203(1) = EMPTY THEN**

**MW204** (NUMBER OF EMPLOYEES NONRESPONSE in section SectionM)

Is it fewer than 5, 5 to 14, 15 to 24, 25 to 99, 100 to 499, or 500 or more?

1 Fewer than 5

2 5 to 14

3 15 to 24

4 25 to 99

5 100 to 499

6 500 or more

**END OF IF**

Fill code of question FLW205 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**MW205** (EARNINGS WHEN LEFT in section SectionM)

What were you earning, before deductions, when you (left that employer/stopped working for that business)?

RANGE 0..99999996

**MW206** (EARNINGS WHEN LEFT - PER in section SectionM)

Per:

1 Hour

2 Week

3 Every two weeks/bi-weekly

4 Month

6 Year

7 Other, please specify:

**MW207** (EARNINGS WHEN LEFT - PER - SPECIFY in section SectionM)



| STRING

END OF GROUP

Fill code of question FLW208 executed

**MW208** (NUMBER OF HOURS WORKED in section SectionM)  
How many hours a week did you usually work for that (employer/business)?  
RANGE 1..96

**MW209** (NUMBER OF WEEKS WORKED in section SectionM)  
How many weeks per year did you usually work for this (employer/business)?  
Please include paid vacations as weeks of work.  
RANGE 1..52

**MW210** (COVERED BY UNION CONTRACT in section SectionM)  
Were you covered by a union or employee-association contract?

END OF IF

IF M026 = 1 OR M026 = 2 OR M027 = RESPONSE THEN

**M028** (LAST JOB WRKD- EMPLOYER HELP OUT in section SectionM)  
At the time your health started to limit your ability to work, did your employer do anything special to help you out so that you could stay at work?  
1 Yes  
4 No help needed  
5 No  
6 Left immediately  
7 Self-employed

IF M028 = 1 THEN  
employercount := 1

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW211\_intro2** (Section SectionM)  
Did your employer...

SUBGROUP OF QUESTIONS

**MW211** (SOMEONE TO HELP in section SectionM)  
Get someone to help you?

**MW214** (SHORTEN WORK DAYS in section SectionM)  
Shorten your work days?

**MW217** (ALLOW CHANGE TIME in section SectionM)  
Allow you to change the time you came to and left work?

**MW220** (ALLOW MORE BREAKS AND REST PERIODS in section SectionM)  
Allow you more breaks and rest periods?

**MW223** (ARRANGE SPECIAL TRANSPORTATION in section SectionM)  
Arrange for special transportation?

**MW226** (CHANGED JOB in section SectionM)  
Change the job to something you could do?

**MW227** (HELPED LEARN NEW SKILLS in section SectionM)  
Help you learn new job skills?

**MW228** (GET SPECIAL EQUIPMENT in section SectionM)  
Get you special equipment for the job?

**MW229** (SOMEONE TO HELP in section SectionM)  
Assist you in receiving rehabilitative services from an external provider?

END OF SUBGROUP

END OF GROUP

**MW230\_temp** (OTHER THINGS TO HELP OUT in section SectionM)  
Did your employer do any other things to help you out?

MW230(1) := MW230\_temp(1)

IF MW230(1) = YES THEN

**MW231** (OTHER THINGS TO HELP OUT - SPECIFY in section SectionM)  
What other things?  
STRING

END OF IF

END OF IF

END OF IF

END OF IF

IF J020 = 1 AND J021 != 2 THEN

**M029** (CURRENT EMPLOYER HELP in section SectionM)

Does your employer currently do anything special to make it easier for you to stay at work?

**IF M029 = 1 THEN**

employercount := 2

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**MW211\_intro** (Section SectionM)

Does your employer...

**SUBGROUP OF QUESTIONS**

**MW211** (SOMEONE TO HELP in section SectionM)

Get someone to help you?

**MW214** (SHORTEN WORK DAYS in section SectionM)

Shorten your work days?

**MW217** (ALLOW CHANGE TIME in section SectionM)

Allow you to change the time you came to and left work?

**MW220** (ALLOW MORE BREAKS AND REST PERIODS in section SectionM)

Allow you more breaks and rest periods?

**MW223** (ARRANGE SPECIAL TRANSPORTATION in section SectionM)

Arrange for special transportation?

**MW226** (CHANGED JOB in section SectionM)

Change the job to something you could do?

**MW227** (HELPED LEARN NEW SKILLS in section SectionM)

Help you learn new job skills?

**MW228** (GET SPECIAL EQUIPMENT in section SectionM)

Get you special equipment for the job?

**MW229** (SOMEONE TO HELP in section SectionM)

Assist you in receiving rehabilitative services from an external provider?

**END OF SUBGROUP**

END OF GROUP

**MW230** (OTHER THINGS TO HELP OUT in section SectionM)  
Does your employer do any other things to help you out?

IF MW230(2) = YES THEN

**MW231** (OTHER THINGS TO HELP OUT - SPECIFY in section SectionM)  
What other things?  
STRING

END OF IF

END OF IF

END OF IF

END OF IF

END OF IF

IF Z118 = 1 OR Z099 = 1 THEN

**M030** (RECEIVING BENEFITS- -WHICH PROGRAM in section SectionM)

According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you were receiving benefits from the Social Security Disability program or the Supplemental Security Income program.

Which program was this: the Social Security Disability or the Supplemental Security Income Program, or both?

- 1 Social Security Disability Insurance (SSDI)
- 2 Supplemental Security Income (SSI)
- 3 Both
- 7 I did not previously receive either benefit

IF M030 = 1 OR M030 = 3 THEN

benefitcounter := 1

Fill code of question FLProgram executed

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

IF MW238(1) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

- 1 Household resources increased
- 2 I returned to work

3 Not working but able to work  
7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)  
STRING

END OF GROUP

END OF IF

IF MW238(1) = RESPONSE THEN

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)  
(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)  
RANGE 0..99999996

IF MW239(1) = EMPTY THEN

MW240\_Unf\_Random(1) := 5  
bracket := array(1 →400, 2 →650, 3 →900, 4 →1100)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)  
Per month, was it more, about, or less than...

MW240\_Unf\_Results(1) := explodeUnfolding(MW240\_Unf(1))

IF MW240\_Unf\_Results(1,1) = MW240\_Unf\_Results(1,2) THEN

    MW240\_Unf\_Results(1,3) := MW240\_Unf\_Results(1,1)

ELSE

    MW240\_Unf\_Results(1,3) := empty

END OF IF

END OF IF

IF MW238(1) != 1 THEN

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)  
In what year did the benefits stop?  
RANGE (())..(())

IF MW244(1) = RESPONSE AND (FLCurrentYear - MW244(1)) < 2 THEN

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)  
In what month was that?

END OF IF

END OF IF

END OF IF

END OF IF

IF M030 = 2 OR M030 = 3 THEN

benefitcounter := 2

Fill code of question FLProgram executed

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

IF MW238(2) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

1 Household resources increased

2 I returned to work

3 Not working but able to work

7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

END OF GROUP

END OF IF

IF MW238(2) = RESPONSE THEN

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)

RANGE 0..99999996

IF MW239(2) = EMPTY THEN

```

MW240_Unf_Random(2) := 5
bracket := array(1 →150, 2 →400, 3 →500, 4 →600)

MW240_Unf (Was it more, about, or less than... in section SectionM)
Per month, was it more, about, or less than...

MW240_Unf_Results(2) := explodeUnfolding(MW240_Unf(2))

IF MW240_Unf_Results(2,1) = MW240_Unf_Results(2,2) THEN
| MW240_Unf_Results(2,3) := MW240_Unf_Results(2,1)
ELSE
| MW240_Unf_Results(2,3) := empty
END OF IF
END OF IF

IF MW238(2) != 1 THEN
| MW244_minimum := 1900

MW244 (BENEFITS - WHEN STOPPED in section SectionM)
In what year did the benefits stop?
RANGE (()).(())

IF MW244(2) = RESPONSE AND (FLCurrentYear - MW244(2)) < 2 THEN
| MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
| In what month was that?
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

END OF IF
END OF IF

IF Z076 = 1 THEN
IF Z122 = 1 OR M002 = 1 THEN
IF Z118 = 3 OR Z099 = 3 THEN
| M031 (APPLIED FOR SS BENEFITS- -WHICH PROGRAM in section SectionM)
| According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you had applied for benefits from the Social Security Disability program or the Supplemental Security Income program.

```

Which program was this: the Social Security Disability or the Supplemental Security Income Program, or both?

- 1 Social Security Disability Insurance (SSDI)
- 2 Supplemental Security Income (SSI)
- 3 Both
- 7 I did not previously apply for either benefit

IF M031 = RESPONSE AND M031 != 7 THEN

IF M031 = 1 OR M031 = 3 THEN

**M032** (SSDI APPLICATION APPROVED in section SectionM)

Was your SSDI application approved?

- 1 Yes
- 3 Still haven't heard
- 5 No

IF M032 = 1 OR M032 = 5 THEN

IF M032 = 1 THEN

benefitcounter := 3  
Fill code of question FLProgram executed  
MW234\_minimum := 1900

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

- 1
- 9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE (())..(())

#### END OF GROUP

IF (MW234\_options(3) != 9997 AND MW234(3) = RESPONSE AND (FLCurrentYear - MW234(3)) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?



END OF IF

IF MW234\_options(3) != 9997 THEN

**MW235** (SSDI - OFFERED SERVICES in section SectionM)  
Were you offered rehabilitative services?

IF MW235(3) = 1 THEN

MW237\_minimum := 1900

**MW237** (SSDI - OFFERED SERVICES - WHEN in section SectionM)  
In what year were you offered rehabilitative services?  
RANGE (())..(())

IF MW237(3) = RESPONSE AND (FLCurrentYear - MW237(3) < 2)  
THEN

**MW236** (SSDI - WHEN OFFERED SERVICES - MONTH in section SectionM)  
In what month was that?

END OF IF

END OF IF

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)**?

IF MW238(3) = 5 OR MW238(3) = 1 THEN

IF MW238(3) = 5 THEN

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

1 Household resources increased

2 I returned to work

3 Not working but able to work

7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

**END OF GROUP**

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)

RANGE 0..99999996

IF MW239(3) = EMPTY THEN

    MW240\_Unf\_Random(3) := 5

    bracket := array(1 →400, 2 →650, 3 →900, 4 →1100)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf\_Results(3) := explodeUnfolding(MW240\_Unf(3))

IF MW240\_Unf\_Results(3,1) = MW240\_Unf\_Results(3,2) THEN

    MW240\_Unf\_Results(3,3) := MW240\_Unf\_Results(3,1)

ELSE

    MW240\_Unf\_Results(3,3) := empty

END OF IF

END OF IF

IF MW238(3) = 5 THEN

    MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (()).(())

IF MW244(3) = RESPONSE AND (FLCurrentYear - MW244(3) < 2) THEN

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

In what month was that?

END OF IF

END OF IF

END OF IF

END OF IF

ELSEIF M032 = 5 THEN

benefitcounter := 1  
Fill code of question FLProgram executed

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)  
Did you appeal or apply again later?

**IF MW245(1) = 1 THEN**

MW247.minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?  
RANGE (())..(())

**IF MW247(1) = RESPONSE AND (FLCurrentYear - MW247(1) < 2) THEN**

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted  
3 Application still being considered  
5 Application rejected

**IF MW248(1) = 1 THEN**

benefitcounter := 4  
Fill code of question FLProgram executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

MW234.minimum := 1900

**MW234.options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1  
9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)  
In what year did you start receiving **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)** benefits?  
RANGE (()).(())

END OF GROUP

IF (MW234\_options(4) != 9997 AND MW234(4) = RESPONSE AND (FLCurrentYear - MW234(4)) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)  
In what month was that?

END OF IF

IF MW234\_options(4) != 9997 THEN

**MW235** (SSDI - OFFERED SERVICES in section SectionM)  
Were you offered rehabilitative services?

IF MW235(4) = 1 THEN

MW237\_minimum := 1900

**MW237** (SSDI - OFFERED SERVICES - WHEN in section SectionM)  
In what year were you offered rehabilitative services?  
RANGE (()).(())

IF MW237(4) = RESPONSE AND (FLCurrentYear - MW237(4)) < 2) THEN

**MW236** (SSDI - WHEN OFFERED SERVICES - MONTH in section SectionM)  
In what month was that?

END OF IF

END OF IF

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)**?

IF MW238(4) = 5 OR MW238(4) = 1 THEN

IF MW238(4) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

- 1 Household resources increased
- 2 I returned to work
- 3 Not working but able to work
- 7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

END OF GROUP

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)

RANGE 0..99999996

IF MW239(4) = EMPTY THEN

MW240\_Unf\_Random(4) := 5

bracket := array(1 →400, 2 →650, 3 →900, 4 →1100)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf\_Results(4) := explodeUnfolding(MW240\_Unf(4))

IF MW240\_Unf\_Results(4,1) = MW240\_Unf\_Results(4,2) THEN

    MW240\_Unf\_Results(4,3) := MW240\_Unf\_Results(4,1)

ELSE

    MW240\_Unf\_Results(4,3) := empty

END OF IF

END OF IF

IF MW238(4) = 5 THEN

```

MW244_minimum := 1900

MW244 (BENEFITS - WHEN STOPPED in section SectionM)
In what year did the benefits stop?
RANGE (()).(())

IF MW244(4) = RESPONSE AND (FLCurrentYear - MW244(4)
< 2) THEN
  MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
  In what month was that?
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

IF M031 = 2 OR M031 = 3 THEN
benefitcounter := 5
Fill code of question FLProgram executed

M033 (SSI APPLICATION APPROVED in section SectionM)
Was your SSI application approved?
1 Yes
3 Still haven't heard
5 No

IF M033 = 1 THEN
  GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

  MW234_minimum := 1900

  MW234_options (BEGIN RECEIVING BENEFITS-YR in section SectionM)
  In what year did it you start receiving (Social Security Disability/Supplemental
  Security Income/Veterans Administration/Workers' Compensation/public wel-
  fare or other government) benefits?
  1
  9997 Not yet receiving benefits

  MW234 (SSDI - WHEN START RECEIVING in section SectionM)

```

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE (())...(())

END OF GROUP

IF (MW234\_options(5) != 9997 AND MW234(5) = RESPONSE AND (FLCurrentYear - MW234(5)) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

END OF IF

IF MW234\_options(5) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

IF MW238(5) = 5 OR MW238(5) = 1 THEN

IF MW238(5) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

1 Household resources increased

2 I returned to work

3 Not working but able to work

7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

END OF GROUP

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the **FLProgram program** last month?/How much did you receive from the **FLProgram program** the last month you

received this benefit?)  
RANGE 0..99999996

**IF MW239(5) = EMPTY THEN**

MW240\_Unf\_Random(5) := 5  
bracket := array(1 →150, 2 →400, 3 →500, 4 →600)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)  
Per month, was it more, about, or less than...

MW240\_Unf\_Results(5) := explodeUnfolding(MW240\_Unf(5))

**IF MW240\_Unf\_Results(5,1) = MW240\_Unf\_Results(5,2) THEN**

MW240\_Unf\_Results(5,3) := MW240\_Unf\_Results(5,1)

**ELSE**

MW240\_Unf\_Results(5,3) := empty

**END OF IF**

**END OF IF**

**IF MW238(5) = 5 THEN**

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (())..(())

**IF MW244(5) = RESPONSE AND (FLCurrentYear - MW244(5)) < 2  
THEN**

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

In what month was that?

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**ELSEIF M033 = 5 THEN**

benefitcounter := 2

Fill code of question FLProgram executed

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)

Did you appeal or apply again later?

**IF MW245(2) = 1 THEN**



MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?

RANGE ()..( )

**IF MW247(2) = RESPONSE AND (FLCurrentYear - MW247(2)) < 2 THEN**

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted

3 Application still being considered

5 Application rejected

**IF MW248(2) = 1 THEN**

benefitcounter := 6

Fill code of question FLProgram executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE ()..( )

END OF GROUP

IF (MW234\_options(6) != 9997 AND MW234(6) = RESPONSE AND (FLCurrentYear - MW234(6)) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

END OF IF

IF MW234\_options(6) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)?**

IF MW238(6) = 5 OR MW238(6) = 1 THEN

IF MW238(6) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

- 1 Household resources increased
- 2 I returned to work
- 3 Not working but able to work
- 7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)  
STRING

END OF GROUP

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)

RANGE 0..99999996

IF MW239(6) = EMPTY THEN

```

MW240_Unf_Random(6) := 5
bracket := array(1 →150, 2 →400, 3 →500, 4 →600)

MW240_Unf (Was it more, about, or less than... in section SectionM)
Per month, was it more, about, or less than...

MW240_Unf_Results(6) := explodeUnfolding(MW240_Unf(6))

IF MW240_Unf_Results(6,1) = MW240_Unf_Results(6,2) THEN
| MW240_Unf_Results(6,3) := MW240_Unf_Results(6,1)
ELSE
| MW240_Unf_Results(6,3) := empty
END OF IF
END OF IF

IF MW238(6) = 5 THEN
| MW244_minimum := 1900

MW244 (BENEFITS - WHEN STOPPED in section SectionM)
In what year did the benefits stop?
RANGE (()).(())

IF MW244(6) = RESPONSE AND (FLCurrentYear - MW244(6)) <
2 THEN
| MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
| In what month was that?
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

IF Z076 = 1 THEN
| IF Z122 = 1 OR M002 = 1 THEN

```

**IF Z100 = 1 THEN**

benefitcounter := 7

Fill code of question FLProgram executed

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

**IF MW238(7) = 1 OR MW238(7) = 5 THEN**

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)

RANGE 0..99999996

**IF MW239(7) = EMPTY THEN**

MW240\_Unf\_Random(7) := 11

bracket := array(1 →500, 2 →1000, 3 →1500)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf\_Results(7) := explodeUnfolding(MW240\_Unf(7))

**IF MW240\_Unf\_Results(7,1) = MW240\_Unf\_Results(7,2) THEN**

    MW240\_Unf\_Results(7,3) := MW240\_Unf\_Results(7,1)

**ELSE**

    MW240\_Unf\_Results(7,3) := empty

**END OF IF**

**END OF IF**

**IF MW238(7) = 5 THEN**

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (())..(())

**IF MW244(7) = RESPONSE AND (FLCurrentYear - MW244(7)) < 2 THEN**

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

In what month was that?

END OF IF

END OF IF

END OF IF

**ELSEIF Z100 = 3 THEN**

benefitcounter := 8

Fill code of question FLProgram executed

**M034** (VA BENEFITS APPLICATION APPROVED in section SectionM)

According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you had applied for benefits from the Veterans Administration.

Was your application approved?

1 Yes

3 Still haven't heard

5 No

7 I never applied for benefits

**IF M034 = 1 THEN**

**MW232** (VA - RATING in section SectionM)

What disability rating did you receive? (100% equals full disability)

RANGE 0..100

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE ()..(())

END OF GROUP

IF (MW234\_options(8) != 9997 AND MW234(8) = RESPONSE AND (FLCur-

rentYear - MW234(8) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)  
In what month was that?

END OF IF

IF MW234\_options(8) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

IF MW238(8) = 5 OR MW238(8) = 1 THEN

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)  
(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)  
RANGE 0..99999996

IF MW239(8) = EMPTY THEN

MW240\_Unf\_Random(8) := 11  
bracket := array(1 →500, 2 →1000, 3 →1500)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)  
Per month, was it more, about, or less than...

MW240\_Unf\_Results(8) := explodeUnfolding(MW240\_Unf(8))

IF MW240\_Unf\_Results(8,1) = MW240\_Unf\_Results(8,2) THEN

    MW240\_Unf\_Results(8,3) := MW240\_Unf\_Results(8,1)

ELSE

    MW240\_Unf\_Results(8,3) := empty

END OF IF

END OF IF

IF MW238(8) = 5 THEN

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)  
In what year did the benefits stop?  
RANGE (())..(())

```

| IF MW244(8) = RESPONSE AND (FLCurrentYear - MW244(8) < 2) THEN
|   MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
|   In what month was that?
|   END OF IF
| END OF IF
| END OF IF
| END OF IF
| END OF IF
END OF IF

```

```

IF Z119 = 1 THEN
benefitcounter := 9
Fill code of question FLProgram executed

```

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

```

IF MW238(9) = 5 OR MW238(9) = 1 THEN
Fill code of question FL_W239 executed

```

**MW239** (BENEFITS - AMOUNT in section SectionM)  
(How much did you receive from the ^**FLProgram program** last month?/How much did you receive from the ^**FLProgram program** the last month you received this benefit?)  
RANGE 0..99999996

```

IF MW239(9) = EMPTY THEN
MW240_Unf_Random(9) := 5
bracket := array(1 →500, 2 →1000, 3 →1500, 4 →2200)

```

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)  
Per month, was it more, about, or less than...

```

MW240_Unf_Results(9) := explodeUnfolding(MW240_Unf(9))

```

```

IF MW240_Unf_Results(9,1) = MW240_Unf_Results(9,2) THEN
| MW240_Unf_Results(9,3) := MW240_Unf_Results(9,1)
ELSE
| MW240_Unf_Results(9,3) := empty
END OF IF

```

END OF IF

IF MW238(9) = 5 THEN

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (())..(())

IF MW244(9) = RESPONSE AND (FLCurrentYear - MW244(9) < 2) THEN

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

In what month was that?

END OF IF

END OF IF

END OF IF

ELSEIF Z119 = 3 THEN

benefitcounter := 10

Fill code of question FLProgram executed

**M035** (WORKERS COMP APPLICATION APPROVED in section SectionM)

According to our records, in (January/February/March/April/May/June/July/August/September/October/November/December) you had applied for benefits from Workers' Compensation.

Was your application approved?

1 Yes

3 Still haven't heard

5 No

7 I never applied for benefits

IF M035 = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public



**welfare or other government) benefits?**  
RANGE ()..(())

**END OF GROUP**

**IF (MW234\_options(10) != 9997 AND MW234(10) = RESPONSE AND (FLCurrentYear - MW234(10)) < 2) THEN**

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)  
In what month was that?

**END OF IF**

**IF MW234\_options(10) != 9997 THEN**

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

**IF MW238(10) = 5 OR MW238(10) = 1 THEN**

Fill code of question FL.W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)  
(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)  
RANGE 0..99999996

**IF MW239(10) = EMPTY THEN**

MW240\_Unf\_Random(10) := 5  
bracket := array(1 →500, 2 →1000, 3 →1500, 4 →2200)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)  
Per month, was it more, about, or less than...

MW240\_Unf\_Results(10) := explodeUnfolding(MW240\_Unf(10))

**IF MW240\_Unf\_Results(10,1) = MW240\_Unf\_Results(10,2) THEN**

MW240\_Unf\_Results(10,3) := MW240\_Unf\_Results(10,1)

**ELSE**

MW240\_Unf\_Results(10,3) := empty

**END OF IF**

**END OF IF**

**IF MW238(10) = 5 THEN**

```

MW244_minimum := 1900

MW244 (BENEFITS - WHEN STOPPED in section SectionM)
In what year did the benefits stop?
RANGE ()..(())

IF MW244(10) = RESPONSE AND (FLCurrentYear - MW244(10) < 2)
THEN
  MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
  In what month was that?
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

IF Z076 = 1 THEN
  IF Z122 = 1 OR M002 = 1 THEN
    M036 (APPLIED FOR OTHER GOVT BENEFITS in section SectionM)
    Since (January/February/March/April/May/June/July/August/September/October/November/December),
    (()), have you applied for disability benefits from any other government program?

    IF M036 = 1 THEN
      GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

      M037 (WHICH PROGRAMS in section SectionM)
      Which programs did you apply to?
      1 Social Security Disability Program (SSDI) or Supplemental Security Income
      Program (SSI)
      2 Veterans Administration Program
      3 Workers' Compensation Program
      4 Public Welfare Disability Program
      7 Other, please specify:

      M038 (GOVT PROGRAM- -OTHER in section SectionM)
      STRING

    END OF GROUP

    IF 1 IN M037 THEN

```

**M058** (APPLIED FOR SS BENEFITS- -WHICH PROGRAM in section SectionM)  
Did you apply to Social Security Disability or the Supplemental Security Income Program, or both?

- 1 Social Security Disability Insurance (SSDI)
- 2 Supplemental Security Income (SSI)
- 3 Both

**IF M058 = 1 OR M058 = 3 THEN**

benefitcounter := 1  
Fill code of question FLProgram2 executed  
Fill code of question FLMW250 executed

**MW250** (YEAR FIRST APPLIED FOR DISABILITY BENEFITS in section SectionM)

(In/Not including those disability benefits we have already discussed,) what year did you first apply for disability benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program?

RANGE 1900..(())

**IF MW250(1) = RESPONSE AND (FLCurrentYear - MW250(1)) < 2 THEN**

**MW249** (DISABILITY BENEFITS - WHEN STARTED - MONTH in section SectionM)

In what month was that?

**END OF IF**

**IF Z093 > MW250(1) OR (Z093=MW250(1) AND PrevIWMonth > MW249(1)) THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**MW252\_options** (FIRST APPLIED FOR BENEFITS-YR in section SectionM)

We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December), (()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

1

9997 Not applied since (January/February/March/April/May/June/July/August/September/October/November/December), (())

**MW252** (YEAR FIRST APPLIED FOR BENEFITS SINCE LAST IW in

section SectionM)

We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

RANGE (())..(())

END OF GROUP

IF MW252(1) = RESPONSE AND (FLCurrentYear - MW252(1) < 2) THEN

**MW251** (DISABILITY BENEFITS - WHEN FIRST APPLIED - MONTH in section SectionM)

In what month was that?

END OF IF

END OF IF

IF MW252\_options(1) != 9997 THEN

**M040** (APPLICATION ACCEPTED/REJECTED/CONSIDERED in section SectionM)

Was your application accepted, rejected, or is it still being considered?

Social Security Disability

1 Application accepted

3 Application still being considered

5 Application rejected

IF M040 = 1 OR M040 = 5 THEN

IF M040 = 5 THEN

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)

Did you appeal or apply again later?

IF MW245(3) = 1 THEN

MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?

RANGE (())..(())

IF MW247(3) = RESPONSE AND (FLCurrentYear - MW247(3) < 2)  
THEN

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted

3 Application still being considered

5 Application rejected

**END OF IF**

**END OF IF**

**IF M040 = 1 OR MW248(3) = 1 THEN**

benefitcounter := 11

Fill code of question FLProgram executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE (()).(())

**END OF GROUP**

**IF MW234(11) = RESPONSE AND (FLCurrentYear - MW234(11) < 2) THEN**

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

END OF IF

IF MW234\_options(11) != 9997 THEN

**MW235** (SSDI - OFFERED SERVICES in section SectionM)  
Were you offered rehabilitative services?

IF MW235(11) = 1 THEN

MW237\_minimum := 1900

**MW237** (SSDI - OFFERED SERVICES - WHEN in section SectionM)  
In what year were you offered rehabilitative services?  
RANGE (())..(())

IF MW237(11) = RESPONSE AND (FLCurrentYear - MW237(11) < 2) THEN

**MW236** (SSDI - WHEN OFFERED SERVICES - MONTH in section SectionM)  
In what month was that?

END OF IF

END OF IF

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)**?

IF MW238(11) = 1 OR MW238(11) = 5 THEN

IF MW238(11) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

1 Household resources increased

2 I returned to work

3 Not working but able to work

7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

| END OF GROUP

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)

RANGE 0..99999996

IF MW239(11) = EMPTY THEN

| MW240\_Unf\_Random(11) := 5

| bracket := array(1 →400, 2 →650, 3 →900, 4 →1100)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf\_Results(11) := explodeUnfolding(MW240\_Unf(11))

IF MW240\_Unf\_Results(11,1) = MW240\_Unf\_Results(11,2) THEN

| MW240\_Unf\_Results(11,3) := MW240\_Unf\_Results(11,1)

ELSE

| MW240\_Unf\_Results(11,3) := empty

END OF IF

END OF IF

IF MW238(11) = 5 THEN

| MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (()).(())

IF MW244(11) = RESPONSE AND (FLCurrentYear - MW244(11)) < 2 THEN

| **MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

| In what month was that?

END OF IF

END OF IF

END OF IF

END OF IF  
END OF IF  
END OF IF  
END OF IF  
END OF IF

IF M058 = 2 OR M058 = 3 THEN

benefitcounter := 2  
Fill code of question FLProgram2 executed  
Fill code of question FLMW250 executed

**MW250** (YEAR FIRST APPLIED FOR DISABILITY BENEFITS in section SectionM)  
(In/Not including those disability benefits we have already discussed,) what year did you first apply for disability benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program?  
RANGE 1900..(())

IF MW250(2) = RESPONSE AND (FLCurrentYear - MW250(2)) < 2 THEN

**MW249** (DISABILITY BENEFITS - WHEN STARTED - MONTH in section SectionM)  
In what month was that?

END OF IF

IF Z093 > MW250(2) OR (Z093=MW250(2) AND PrevIWMonth > MW249(2)) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW252\_options** (FIRST APPLIED FOR BENEFITS-YR in section SectionM)  
We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

1

9997 Not applied since (January/February/March/April/May/June/July/August/September/October/November/December),  
(())

**MW252** (YEAR FIRST APPLIED FOR BENEFITS SINCE LAST IW in section SectionM)



We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

RANGE (())..(())

**END OF GROUP**

**IF MW252(2) = RESPONSE AND (FLCurrentYear - MW252(2) < 2) THEN**

**MW251** (DISABILITY BENEFITS - WHEN FIRST APPLIED - MONTH in section SectionM)

In what month was that?

**END OF IF**

**END OF IF**

**IF MW252\_options(2) != 9997 THEN**

**M041** (APPLICATION ACCEPTED/REJECTED/CONSIDERED in section SectionM)

Was your application accepted, rejected, or is it still being considered?

Supplemental Security Income

1 Application accepted

3 Application still being considered

5 Application rejected

**IF M041 = 1 OR M041 = 5 THEN**

**IF M041 = 5 THEN**

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)

Did you appeal or apply again later?

**IF MW245(4) = 1 THEN**

MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?

RANGE (())..(())

**IF MW247(4) = RESPONSE AND (FLCurrentYear - MW247(4) < 2) THEN**

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted

3 Application still being considered

5 Application rejected

**END OF IF**

**END OF IF**

**IF M041 = 1 OR MW248(4) = 1 THEN**

benefitcounter := 12

Fill code of question FLProgram executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE (()).(())

**END OF GROUP**

**IF MW234(12) = RESPONSE AND (FLCurrentYear - MW234(12) < 2) THEN**

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

END OF IF

IF MW234\_options(12) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

IF MW238(12) = 1 OR MW238(12) = 5 THEN

IF MW238(12) = 5 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW256** (BENEFITS - WHY NO LONGER RECEIVING in section SectionM)

Why are you no longer receiving those benefits?

- 1 Household resources increased
- 2 I returned to work
- 3 Not working but able to work
- 7 Other, please specify:

**MW257** (BENEFITS - WHY NO LONGER RECEIVING - SPECIFY in section SectionM)

STRING

END OF GROUP

END OF IF

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)

RANGE 0..99999996

IF MW239(12) = EMPTY THEN

MW240\_Unf\_Random(12) := 5

bracket := array(1 →150, 2 →400, 3 →500, 4 →600)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...



**MW250** (YEAR FIRST APPLIED FOR DISABILITY BENEFITS in section SectionM)  
(In/Not including those disability benefits we have already discussed,) what year did you first apply for disability benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program?  
RANGE 1900..(())

**IF MW250(3) = RESPONSE AND (FLCurrentYear - MW250(3)) < 2 THEN**

**MW249** (DISABILITY BENEFITS - WHEN STARTED - MONTH in section SectionM)  
In what month was that?

**END OF IF**

**IF Z093 > MW250(3) OR (Z093=MW250(3) AND PrevIWMonth > MW249(3)) THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**MW252\_options** (FIRST APPLIED FOR BENEFITS-YR in section SectionM)  
We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

1

9997 Not applied since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

**MW252** (YEAR FIRST APPLIED FOR BENEFITS SINCE LAST IW in section SectionM)  
We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

RANGE (())..(())

**END OF GROUP**

**IF MW252(3) = RESPONSE AND (FLCurrentYear - MW252(3) < 2) THEN**  
    **MW251** (DISABILITY BENEFITS - WHEN FIRST APPLIED - MONTH in section SectionM)  
    In what month was that?  
    **END OF IF**  
**END OF IF**

**IF MW252\_options(3) != 9997 THEN**  
    **M042** (APPLICATION ACCEPTED/REJECTED/CONSIDERED in section SectionM)  
    Was your application accepted, rejected, or is it still being considered?  
  
    Veterans Administration  
    1 Application accepted  
    3 Application still being considered  
    5 Application rejected

**IF M042 = 1 OR M042 = 5 THEN**  
    **IF M042 = 5 THEN**  
        **MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)  
        Did you appeal or apply again later?

**IF MW245(5) = 1 THEN**  
        MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)  
    In what year did you last appeal or apply for benefits?  
    RANGE (())..(())

**IF MW247(5) = RESPONSE AND (FLCurrentYear - MW247(5) < 2) THEN**

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)  
        What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)  
    Was your application eventually accepted, rejected, or is it still being considered?  
    1 Application accepted  
    3 Application still being considered

5 Application rejected

END OF IF

END OF IF

IF M042 = 1 OR MW248(5) = 1 THEN

benefitcounter := 13

Fill code of question FLProgram executed

**MW232** (VA - RATING in section SectionM)

What disability rating did you receive? (100% equals full disability)

RANGE 0..100

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE ()..()

END OF GROUP

IF MW234(13) = RESPONSE AND (FLCurrentYear - MW234(13) < 2) THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

END OF IF

IF MW234\_options(13) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers'**

**Compensation/public welfare or other government)?**

**IF MW238(13) = 1 OR MW238(13) = 5 THEN**

Fill code of question FL.W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the ^FLProgram program last month?/How much did you receive from the ^FLProgram program the last month you received this benefit?)

RANGE 0..99999996

**IF MW239(13) = EMPTY THEN**

MW240\_Unf.Random(13) := 11

bracket := array(1 →500, 2 →1000, 3 →1500)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf.Results(13) := explodeUnfolding(MW240\_Unf(13))

**IF MW240\_Unf.Results(13,1) = MW240\_Unf.Results(13,2) THEN**

    MW240\_Unf.Results(13,3) := MW240\_Unf.Results(13,1)

**ELSE**

    MW240\_Unf.Results(13,3) := empty

**END OF IF**

**END OF IF**

**IF MW238(13) = 5 THEN**

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)

In what year did the benefits stop?

RANGE (())..(())

**IF MW244(13) = RESPONSE AND (FLCurrentYear - MW244(13)) < 2 THEN**

**MW243** (SSDI - WHEN STOPPED - MONTH in section SectionM)

    In what month was that?

**END OF IF**

**END OF IF**

**END OF IF**



END OF IF  
END OF IF  
END OF IF  
END OF IF  
END OF IF

IF 3 IN M037 THEN

benefitcounter := 4  
Fill code of question FLProgram2 executed  
Fill code of question FLMW250 executed

**MW250** (YEAR FIRST APPLIED FOR DISABILITY BENEFITS in section SectionM)  
(In/Not including those disability benefits we have already discussed,) what year did you first apply for disability benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program?  
RANGE 1900..(())

IF MW250(4) = RESPONSE AND (FLCurrentYear - MW250(4)) < 2 THEN

**MW249** (DISABILITY BENEFITS - WHEN STARTED - MONTH in section SectionM)  
In what month was that?

END OF IF

IF Z093 > MW250(4) OR (Z093=MW250(4) AND PrevIWMonth > MW249(4)) THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW252\_options** (FIRST APPLIED FOR BENEFITS-YR in section SectionM)  
We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

1

9997 Not applied since (January/February/March/April/May/June/July/August/September/October/November/December),  
(())

**MW252** (YEAR FIRST APPLIED FOR BENEFITS SINCE LAST IW in section SectionM)  
We are interested in your first application since (Jan-

uary/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

RANGE ()..(())

**END OF GROUP**

**IF MW252(4) = RESPONSE AND (FLCurrentYear - MW252(4) < 2) THEN**

**MW251** (DISABILITY BENEFITS - WHEN FIRST APPLIED - MONTH in section SectionM)

In what month was that?

**END OF IF**

**END OF IF**

**IF MW252\_options(4) != 9997 THEN**

**M043** (APPLICATION ACCEPTED/REJECTED/CONSIDERED in section SectionM)

Was your application accepted, rejected, or is it still being considered?

Workers' Compensation

1 Application accepted

3 Application still being considered

5 Application rejected

**IF M043 = 5 THEN**

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)

Did you appeal or apply again later?

**IF MW245(6) = 1 THEN**

MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?

RANGE ()..(())

**IF MW247(6) = RESPONSE AND (FLCurrentYear - MW247(6) < 2) THEN**

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

**END OF IF**

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted

3 Application still being considered

5 Application rejected

**END OF IF**

**END OF IF**

**IF M043 = 1 OR MW248(6) = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**M044** (DISABILITY RATING- -WORKERS COMPENSATION in section SectionM)

What disability rating did you receive?

Workers' Compensation

1 100% permanent

2 Partial permanent

3 100% temporary

4 Partial temporary

7 Other (Specify)

**M045** (DISABILITY RATING- -OTHER in section SectionM)

STRING

**END OF GROUP**

**IF M044 = 2 THEN**

**M046** (WC-PERCENTAGE in section SectionM)

What percentage did you receive?

RANGE 0..100

**ELSEIF M044 = 3 THEN**

**M047** (WC- -HOW MANY YEARS in section SectionM)

For how many years?

RANGE 0..50

**ELSEIF M044 = 4 THEN**

**M048** (WC-PERCENTAGE in section SectionM)  
What percentage did you receive?  
RANGE 0..100

**M049** (WC- -HOW MANY YEARS in section SectionM)  
For how many years?  
RANGE 0..50

END OF IF

benefitcounter := 14  
Fill code of question FLProgram executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)  
In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?  
1  
9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)  
In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?  
RANGE ()..(())

END OF GROUP

IF MW234(14) = RESPONSE AND (FLCurrentYear - MW234(14) < 2)  
THEN

**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)  
In what month was that?

END OF IF

IF MW234\_options(14) != 9997 THEN

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)  
Are you still receiving benefits from (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**)?

```

IF MW238(14) = 1 OR MW238(14) = 5 THEN
  Fill code of question FL_W239 executed

  MW239 (BENEFITS - AMOUNT in section SectionM)
  (How much did you receive from the ^FLProgram program last month?/How
  much did you receive from the ^FLProgram program the last month you
  received this benefit?)
  RANGE 0..99999996

  IF MW239(14) = EMPTY THEN
    MW240_Unf_Random(14) := 5
    bracket := array(1 →500, 2 →1000, 3 →1500, 4 →2200)

    MW240_Unf (Was it more, about, or less than... in section SectionM)
    Per month, was it more, about, or less than...

    MW240_Unf_Results(14) := explodeUnfolding(MW240_Unf(14))

    IF MW240_Unf_Results(14,1) = MW240_Unf_Results(14,2) THEN
      MW240_Unf_Results(14,3) := MW240_Unf_Results(14,1)
    ELSE
      MW240_Unf_Results(14,3) := empty
    END OF IF
  END OF IF
END OF IF

IF MW238(14) = 5 THEN
  MW244_minimum := 1900

  MW244 (BENEFITS - WHEN STOPPED in section SectionM)
  In what year did the benefits stop?
  RANGE (())..(())

  IF MW244(14) = RESPONSE AND (FLCurrentYear - MW244(14)) <
  2 THEN
    MW243 (SSDI - WHEN STOPPED - MONTH in section SectionM)
    In what month was that?
  END OF IF
END OF IF
END OF IF
END OF IF
END OF IF
END OF IF

```

END OF IF  
END OF IF  
END OF IF  
END OF IF

IF Z076 = 1 THEN

IF Z122 = 1 OR M002 = 1 THEN

IF M036 = 1 THEN

IF 4 IN M037 OR 7 IN M037 THEN

benefitcounter := 5

Fill code of question FLProgram2 executed

Fill code of question FLMW250 executed

**MW250** (YEAR FIRST APPLIED FOR DISABILITY BENEFITS in section SectionM)  
(In/Not including those disability benefits we have already discussed,) what year did you first apply for disability benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program?  
RANGE 1900..()

IF MW250(5) = RESPONSE AND (FLCurrentYear - MW250(5)) < 2 THEN

**MW249** (DISABILITY BENEFITS - WHEN STARTED - MONTH in section SectionM)  
In what month was that?

END OF IF

IF Z093 > MW250(5) OR (Z093=MW250(5) AND PrevIWMonth > MW249(5))  
THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**MW252\_options** (FIRST APPLIED FOR BENEFITS-YR in section SectionM)  
We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
().

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

1

9997 Not applied since (January/February/March/April/May/June/July/August/September/October/November/December),  
().

**MW252** (YEAR FIRST APPLIED FOR BENEFITS SINCE LAST IW in section SectionM)

tion SectionM)

We are interested in your first application since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()).

In what year did you first apply for benefits from the (Social Security Disability/Supplemental Security Income /Veterans Administration/Workers' Compensation/public welfare or other government disability) program since that time?

RANGE ()..(())

#### END OF GROUP

**IF MW252(5) = RESPONSE AND (FLCurrentYear - MW252(5) < 2) THEN**

**MW251** (DISABILITY BENEFITS - WHEN FIRST APPLIED - MONTH in section SectionM)

In what month was that?

**END OF IF**

**END OF IF**

**IF MW252\_options(5) != 9997 THEN**

**M050** (APPLICATION ACCEPTED/REJECTED/CONSIDERED in section SectionM)

Was your application accepted, rejected, or is it still being considered?

Any Other Programs

1 Application accepted

3 Application still being considered

5 Application rejected

**IF M050 = 1 OR M050 = 5 THEN**

**IF M050 = 5 THEN**

**MW245** (APPLIED FOR SSDI - APPEAL in section SectionM)

Did you appeal or apply again later?

**IF MW245(7) = 1 THEN**

MW247\_minimum := 1900

**MW247** (APPLIED FOR BENEFIT - APPEAL - WHEN in section SectionM)

In what year did you last appeal or apply for benefits?

RANGE ()..(())

**IF MW247(7) = RESPONSE AND (FLCurrentYear - MW247(7) < 2)**

THEN

**MW246** (APPLIED FOR SSDI - APPEAL - WHEN - MONTH in section SectionM)

What month was that?

END OF IF

**MW248** (APPLIED FOR SSDI/SSI - APPEAL - OUTCOME in section SectionM)

Was your application eventually accepted, rejected, or is it still being considered?

1 Application accepted

3 Application still being considered

5 Application rejected

END OF IF

END OF IF

IF M050 = 1 OR MW248(7) = 1 THEN

benefitcounter := 15

Fill code of question FLProgram executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

MW234\_minimum := 1900

**MW234\_options** (BEGIN RECEIVING BENEFITS-YR in section SectionM)

In what year did it you start receiving (Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government) benefits?

1

9997 Not yet receiving benefits

**MW234** (SSDI - WHEN START RECEIVING in section SectionM)

In what year did you start receiving (**Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government**) benefits?

RANGE ()..()

END OF GROUP

IF MW234(15) = RESPONSE AND (FLCurrentYear - MW234(15) < 2)  
THEN



**MW233** (SSDI/SSI - WHEN START RECEIVING - MONTH in section SectionM)

In what month was that?

**END OF IF**

**IF MW234\_options(15) != 9997 THEN**

FLProgram := "public welfare or other government program"

**MW238** (BENEFITS - STILL RECEIVING in section SectionM)

Are you still receiving benefits from **(Social Security Disability/Supplemental Security Income/Veterans Administration/Workers' Compensation/public welfare or other government)?**

**IF MW238(15) = 1 OR MW238(15) = 5 THEN**

Fill code of question FL\_W239 executed

**MW239** (BENEFITS - AMOUNT in section SectionM)

(How much did you receive from the **^FLProgram program** last month?/How much did you receive from the **^FLProgram program** the last month you received this benefit?)

RANGE 0..99999996

**IF MW239(15) = EMPTY THEN**

MW240\_Unf\_Random(15) := 5

bracket := array(1 →150, 2 →400, 3 →500, 4 →600)

**MW240\_Unf** (Was it more, about, or less than... in section SectionM)

Per month, was it more, about, or less than...

MW240\_Unf\_Results(15) := explodeUnfolding(MW240\_Unf(15))

**IF MW240\_Unf\_Results(15,1) = MW240\_Unf\_Results(15,2) THEN**

    MW240\_Unf\_Results(15,3) := MW240\_Unf\_Results(15,1)

**ELSE**

    MW240\_Unf\_Results(15,3) := empty

**END OF IF**

**END OF IF**

**IF MW238(15) = 5 THEN**

MW244\_minimum := 1900

**MW244** (BENEFITS - WHEN STOPPED in section SectionM)



3 3  
4 4  
5 5  
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30 30  
31 31

**M055** (LAST INJURY - YEAR in section SectionM)  
RANGE 1900..(())

END OF GROUP

END OF IF

END OF IF

ELSE

/\* New interview questions not asked. \*/

END OF IF

IF z076 = YES THEN

**M056** (ASSIST SECTION M1 in section SectionM)

How often did you receive assistance with these questions about any health limitations you might have had and any benefits you might have applied for?

- 1 Never
- 2 A few times
- 3 Most or all of the time

**ELSE**

**M685** (ASSIST SECTION M2 in section SectionM)

How often did you receive assistance with these questions about any health limitations you might have had and any benefits you might have applied for?

- 1 Never
- 2 A few times
- 3 Most or all of the time

**END OF IF**

End of section **SectionM**

Start of section **Closing**

**CS\_001** (HOW PLEASANT INTERVIEW in section Closing)

Could you tell us how interesting or uninteresting you found the questions in this survey?

- 1 Very interesting
- 2 Interesting
- 3 Neither interesting nor uninteresting
- 4 Uninteresting
- 5 Very uninteresting

**CS\_003** (comments in section Closing)

Do you have any other comments on the survey? Please type these in the box below.(If you have no comments, please click next to complete this survey.)

STRING

End of section **Closing**

*/\* Please note that although question CS\_003 is listed in the routing, the answers are not included in the microdata in the event identifiable information is captured. Cleaned responses are available by request. \*/*