

Phone: Pensions

For more information on the Pensions Module see Appendix Q - Cor935.

OVERVIEW

The sibling spouse pension questions mirror those asked of the siblings. The section begins with the types of retirement plans that the spouses own, then follows by asking whether any benefits are being received from these plans. If they were not, eligibility age and expected benefit level are collected. (If the spouses were currently receiving benefits, this information was collected in the income module.)

As in the sibling interview, unfolding brackets followed questions asking for dollar amounts in this section. Associated with these items are four variables (identified by the eight characters of the variable name) detailing the information collected in the bracketing sequence. The character "b" is associated with a summary variable, "u" and "l" denote the upper and lower bounds and "e" indicates the entry point into the bracketing sequence.

During the interview, interviewers had a chance to leave notes with additional information obtained from the respondents. The WLS staff reviewed and processed these notes using a standardized set of decision rules for each section. In many cases processing the notes resulted in changes to the coded responses which created inconsistencies in the skip pattern of the CASES instrument. While we put considerable effort into adjusting such discrepancies, we could not eliminate them all. Occasionally, notes indicated problematic cases due to the lack of specific information or, conversely, cases that contained extra information that was important enough to retain. In such instances we created a flag, identified by the character "f" and attached it to the variable name, for the affected variable.

BRIEF VARIABLE DESCRIPTIONS

BT001RE-BT006RE	Type of pension plans
BT007RE-BT011RE	Current and expected benefits

bt001re: Besides Social Security, do you yourself have any pension or retirement plans, including those you became eligible for through your spouse?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	0	1	1
-3	REFUSED	4	3	7
-1	DON'T KNOW	1	3	4
1	YES	836	908	1744
2	NO	96	259	355

bt002re: Did Sibling Spouse Respondent report employer provided pensions?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	1	8	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	1	6	7
1	YES	497	407	904
2	NO	335	487	822

bt003re: Did Sibling Spouse Respondent report IRAs or Keogh plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	1	8	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	1	6	7
1	YES	392	464	856
2	NO	440	430	870

bt004re: Did Sibling Spouse Respondent report 401k or 403b plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	1	8	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	1	6	7
1	YES	318	358	676
2	NO	514	536	1050

bt005re: Did Sibling Spouse Respondent report annuities?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	1	8	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	1	6	7
1	YES	133	160	293
2	NO	699	734	1433

bt006re: Did Sibling Spouse Respondent report any other type of pension or retirement plan?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	1	8	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	1	6	7
1	YES	192	156	348
2	NO	640	738	1378

bt007re: Are you currently receiving payments from any of these plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-3	REFUSED	4	6	10
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	0	4	4
1	YES	499	267	766
2	NO	333	632	965

bt008re: Do you have any retirement plans from which you are NOT currently receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-3	REFUSED	4	5	9
-2	INAPPROPRIATE INAP/NO RETIREMENT PLANS	101	265	366
-1	DON'T KNOW	2	1	3
1	YES	475	756	1231
2	NO	355	147	502

bt009re: What is the earliest AGE at which you were or would be eligible for these benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	4	0	4
-3	REFUSED	0	1	1
-2	Inappropriate INAP, bt008re = 2 or bt008re IN (-1 -2 -3 -4)	462	418	880
-1	DON'T KNOW	22	90	112
1	NOW/AT ANY AGE/WHENEVER I WANT	66	74	140
39 - 59		152	215	367
60 - 62		117	175	292
63 - 68		75	121	196
69 - 82		39	80	119

bt010re: Amount for: About how much do you EXPECT to receive from these plans when you start receiving benefits? //Bracketed//

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	2	1	3
-3	REFUSED	21	25	46
-2	INAPPROPRIATE INAP/NO PLANS/RECEIVING BENEFITS FROM ALL	462	418	880
-1	DON'T KNOW	166	467	633
0 - 700		41	77	118
730 - 1800		47	64	111
2000 - 4000		67	56	123
4200 - 40000		69	44	113
45000 - 5,000,000		62	22	84

bt011re: Unit for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b260_2, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-4	NOT ASCERTAINED	18	80	98
-2	INAPPROPRIATE INAP	636	833	1469
1	PER MONTH	159	186	345
2	PER YEAR	97	36	133
3	PERCENTAGE OF PAY	1	3	4
4	TOTAL SUM OF BENEFIT	16	24	40
5	LUMP SUM	9	12	21
7	SOMETHING ELSE	1	0	1

bt010reb: Response summary for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-9	ITEM NOT ON PATH	462	418	880
-5	PARTIAL INTERVIEW - QUESTION NOT ASKED	9	5	14
-4	AMOUNT NOT ASCERTAINED	2	1	3
0	NO INFO IN BRACKETING	313	379	692
1	PARTIAL INFO IN BRACKETING	32	69	101
2	COMPLETE INFO IN BRACKETING	128	307	435

bt010rel: Bracket lower bound for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Frequencies				
Value	Label	Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-2	INAPPROPRIATE INAP	748	681	1429
0		47	231	278
500		38	101	139
1000		35	102	137
2000		43	50	93
4000		26	9	35

bt010reu: Bracket upper bound for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Frequencies				
Value	Label	Male	Female	Total
.	System missing - NR	81	166	247
-5	PARTIAL INTERVIEW	9	5	14
-2	INAPPROPRIATE INAP	748	681	1429
500		21	108	129
1000		35	107	142
2000		25	86	111
4000		27	26	53

bt010ree: Bracketing entry point for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

Value	Label	Frequencies		
		Male	Female	Total
-5	PARTIAL INTERVIEW	9	5	14
-2	INAPPROPRIATE INAP	746	675	1421
500		66	186	252
1000		66	179	245
2000		59	134	193

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