

Z1. INTERVIEWER CHECKPOINT: RESPONDENT: EMPLOYER/PENSION/SOCIAL SECURITY NUMBER

<input type="checkbox"/>	1. R IS COVERED BY A PENSION FROM CURRENT JOB (BOX 1 CHECKED AT Y42)
<input type="checkbox"/>	2. ALL OTHERS, (BOX 2 CHECKED AT Y42)--->GO TO Z3--BOTTOM OF THIS PAGE

Z2. I need to get just a few more pieces of information before I leave. In order to obtain the latest available information about the retirement benefits that people with work experience like yours are entitled to, we would like to contact the employer who will be providing your primary pension. For this purpose, we need to know the name and address of the employer, or other organization, that provides the primary pension you expect to receive.

Z2a. EMPLOYER NAME: _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2b. PENSION PROVIDER (IF DIFFERENT): _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2c. REFUSED (EXPLAIN): _____

Z2d. What is the official title of the job from which you expect to receive your primary pension?

_____ OFFICIAL JOB TITLE

Z2e. In order to get complete information on the adequacy of pension and retirement income and to examine health care benefit information of households in our sample, we would like to know your Social Security Number...(what is your Social Security Number?)

SOCIAL SECURITY NUMBER

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Z2f. REFUSED (EXPLAIN): _____

NEXT PAGE, Z4

Z3. The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that you and others like you can expect to receive. For this reason, we would like to know your Social Security Number... (what is your Social Security Number?)

SOCIAL SECURITY NUMBER

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Z3a. REFUSED (EXPLAIN): _____

NEXT PAGE, Z4

RECONTACT INFORMATION

R1. Thank you very much for this interview. We value people like you who are willing to contribute their experiences to our research. We will be sending you a report of some of our findings as a way of expressing our appreciation for your cooperation. Our Regional Supervisor may also be calling or writing you to verify this interview. For these reasons I would like to ask for your name, address and telephone number. **(FOR WOMEN OBTAIN THEIR FIRST NAME, NOT THEIR HUSBAND'S FIRST NAME.)**

R1a. What is your full legal name as it appears on official documents such as your voter's registration, Social Security Card, or driver's license? (IWER: VERIFY SPELLING OF R'S FULL NAME AND WRITE CLEARLY.)

TITLE: MR MRS MISS MS DR REV NAME REFUSED

FIRST NAME MIDDLE INITIAL LAST NAME

R1b. What is your address?

ADDRESS REFUSED

STREET ADDRESS

CITY STATE ZIP CODE

R2. INTERVIEWER CHECKPOINT: ADDRESS AT R1b ABOVE IS:

1. IDENTICAL TO SAMPLE LABEL ADDRESS GO TO R4	2. CORRECTED VERSION OF SAMPLE LABEL ADDRESS GO TO R4	3. DIFFERENT FROM SAMPLE LABEL ↓
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R3. Is this a mailing address for your home, an address you will be moving to, a relative's address, the address of a friend, a business address, or what?

1. MAILING ADDRESS	2. ADDRESS TO WHICH R IS MOVING	3. RELATIVE	4. FRIEND	5. BUSINESS	7. OTHER: _____
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R4. And, what is your telephone number?

AREA CODE TELEPHONE NUMBER

R HAS NO PHONE PHONE NUMBER REFUSED

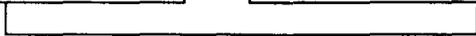
NEXT PAGE, R6

R5. Is your phone number listed in the current telephone directory?

1. YES, LISTED

5. NO, NOT LISTED

8. NOT SURE, DON'T KNOW



GO TO R6

R5a. Is your phone listed in your name?

1. YES

5. NO



R5b. In whose name is the phone listed? (What relation is this person to you?)

NAME _____ RELATIONSHIP _____



R6. Do you have another place of residence or somewhere else you live during different times of the year?

1. YES



5. NO



R6a. We may wish to contact you at your other residence. May I have the address and phone number?

STREET ADDRESS _____ ADDRESS REFUSED

CITY _____ STATE _____ ZIP _____

(AREA CODE) _____ NUMBER _____ R HAS NO PHONE PHONE REFUSED

R7. If for any reason we should have difficulty contacting you, could you give me the name, address, and telephone number of a close friend or relative who will know how to get in touch with you? (And what is this person's relationship to you?)

NAME: _____ RELATIONSHIP TO R: _____

ADDRESS: _____

TELEPHONE: _____

R8. IF R REFUSED ANY RECONTACT INFORMATION: WHAT IS YOUR UNDERSTANDING OF THE REASON(S) THE INFORMATION WAS REFUSED?

RETURN TO THE Q'NAIRE AND COMPLETE SECTION ZZ, INTERVIEWER OBSERVATION

NONINTERVIEW FORM

This form MUST be completed for each coversheet finalized as a Noninterview.
Coversheets finalized as Nonsample do not need to have a Noninterview Form completed.

NI1. Did you ever have any contact with the respondent?

1. YES

5. NO

---> GO TO NI3



NI2. Did R refuse initially?

1. YES

5. NO

--->

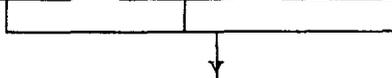


NI2a. Did R break any appointments?

0. NONE

1. ONE

2. TWO OR MORE



NI2b. If there was any resistance from the respondent, what were the reasons given?
(CHECK ALL THAT APPLY.)

A. SURVEYS WASTE OF TIME; PREVIOUS BAD EXPERIENCE

B. VERY ILL

C. 'TOO BUSY'

D. STRESSFUL FAMILY SITUATION

E. CONFIDENTIALITY

F. INVASION OF PRIVACY

G. NO REASON GIVEN

H. OTHER: _____

NI3. Describe here IN DETAIL any interactions you had with the respondent or informant(s) that will help us understand finalizing this coversheet as a Noninterview. Examples of the kind of information we need are attempts made at persuasion--letters, visits, coversheet transfers, excuses/reasons R gave for not participating.

13. In order to determine whom to interview, I need to know who lives here at this address--not their names, just their ages and their relationship to you. Let's start with you--how old are you? (CONTINUE LISTING ALL MEMBERS OF THIS HOUSEHOLD BY RELATIONSHIP TO INFORMANT.)

	(a) Household Members by Relationship to Informant	(b) Sex	(c) Age	(d) Enter "R" to Identify Respondent
1.	INFORMANT			
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

WHOM TO INTERVIEW -- INTERVIEWER INSTRUCTIONS

- a. If household contains only a married couple or persons living as though married, with or without children, interview the person who is most knowledgeable about the family's assets and debts.
- b. If household contains only an adult and their minor children, interview the adult.
- c. If household contains unrelated roommates who are 18 years of age or older, list the household and interview person closest to age 45 as a single person economic unit.
- d. If household contains an extended family (persons related by blood, marriage or adoption--e.g., adult married children living with parents), interview the person or persons most knowledgeable about the family's assets and debts. (FAMILY TO BE INTERVIEWED IS DETERMINED BY WHOSE NAME IS ON THE LEASE OR MORTGAGE. INTERVIEW THE MOST KNOWLEDGEABLE PERSON IN THAT FAMILY.)
- e. **If unclear whom to interview (especially in case d.)--CALL THE F.O.**
- f. NOTE: In ALL situations, the person whose occupation is asked about in Section R is considered the Respondent. Indicate R for this cover sheet in Col. (d) above.

14. We would like to conduct the interview with the person or persons in your family who are most knowledgeable about the family's assets and debts. Who would that be?
15. IF MOST KNOWLEDGEABLE PERSON IS NOT AT HOME, DETERMINE CONVENIENT TIME FOR IW (AND PHONE NUMBER IF APPROPRIATE). RECORD THIS INFORMATION IN THE CALL RECORD, ITEM 12.