

Overview of Pension Estimation Program Databases

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HRS 1992 Pension Plan Detail Database

This Microsoft Access (.mdb) database contains the following tables of interest:

- *PlanInformation*. Contains pension plan information based on the most recent Summary Plan Descriptions available when coding occurred in 1994-1995. (n=1717)
- *Respondents*. Contains data used to calculate pension entitlements for HRS respondents, one record per plan/job type/respondent. Includes Participant ID, Plan ID, sex, birthdate, marital status, employment hire/terminate dates, salary/wage information, voluntary contributions, and wage growth data.
Note: the respondent identifier key for this table, RespondentNumber, is the same as Wave1 CaseID. (n=6387)
- *Wages*. Contains wage information used in calculating pension entitlements, one record per job type/respondent. Note: the respondent identifier key for this table, RespondentNumber, is the same as Wave1 CaseID. (n=4811)
- *SimulatedRespondents*. Contains seed respondent values for use with the simulated respondent feature of the Pension Estimation Program. These values may be modified by the user. (n=1)
- *SimulatedWages*. Contains seed wage value for use with the simulated respondent feature of the Pension Estimation Program. This value may be modified by the user. (n=1)

Note: Testing in April 2016 revealed a problem in 1992 data when vested deferred estimates of present value for Plan 345 include estimates for retirement at age 30. The vested deferred formulas for that plan are corrected in the current version of the 1992 data.

HRS 1998 Pension Plan Detail Database

This Microsoft Access (.mdb) database contains the following tables of interest:

- *PlanInformation*. Contains pension plan information based on the most recent Summary Plan Descriptions available from employers who provided the documents in 1999 as well as employers who were re-contacted in 2003 (n=1454)

- *Respondents*. Contains data used to calculate pension entitlements for HRS respondents, one record per plan/job type/respondent. Includes Participant ID, Plan ID, sex, date of birth, marital status, employment hire/terminate dates, salary/wage information, voluntary contributions, and wage growth data. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=3486)
- *Wages*. Contains wage information used in calculating pension entitlements, one record per job type/respondent. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2214)
- *SimulatedRespondents*. Contains seed respondent values for use with the simulated respondent feature of the Pension Estimation Program. These values may be modified by the user. (n=1)
- *SimulatedWages*. Contains seed wage value for use with the simulated respondent feature of the Pension Estimation Program. This value may be modified by the user. (n=1)
- *PublicPrivate*. This table provides classification of the coded plans as public or private

HRS 2004 Pension Plan Detail Database

This Microsoft Access (.mdb) database contains the following tables of interest:

- *PlanInformation*. Contains coded pension plans information based on the Summary Plan Descriptions (SPDs) obtained from the following sources (variable Source):
 1. Employers of HRS respondents who provided pension documents in the 2005 Employer Pension Provider Survey (EPPS). (n=702)
 2. HRS respondents who provided SPDs in 2006. (n=422)
 3. HRS respondents who provided SPDs in 2004. (n=186)
- *Respondents*. Contains data used to calculate pension entitlements for HRS respondents, one record per plan/job type/respondent. Includes Participant ID, Plan ID, sex, date of birth, marital status, employment hire/terminate dates, salary/wage information, voluntary contributions, and wage growth data. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=3037)
- *Wages*. Contains wage information used in calculating pension entitlements, one record per job type/respondent. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2096)
- *SimulatedRespondents*. Contains seed respondent values for use with the simulated respondent feature of the Pension Estimation Program. These values may be modified by the user by updating and running the query UpdateSimulatedRespondents (n=1)
- *SimulatedWages*. Contains seed wage value for use with the simulated respondent feature of the Pension Estimation Program. This value may be modified by the user. (n=1)

HRS 2010 Pension Plan Detail Database

This Microsoft Access (.mdb) database contains the following tables of interest:

- *PlanInformation*. Contains pension plan information based on Summary Plan Descriptions or Department of Labor Form 5500 filing attachments (n=719)
- *Respondents*. Contains data used to calculate pension entitlements for HRS respondents, one record per plan/job/respondent. Includes Participant ID, Plan ID, sex, date of birth, marital

status, employment hire/terminate dates, salary/wage information, voluntary contributions, and wage growth data. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2590)

- *Wages*. Contains wage information used in calculating pension entitlements, one record per job/respondent. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2565)
- *SimulatedRespondents*. Contains seed respondent values for use with the simulated respondent feature of the Pension Estimation Program. These values may be modified by the user. (n=2, 1 government and 1 private)
- *SimulatedWages*. Contains seed wage value for use with the simulated respondent feature of the Pension Estimation Program. This value may be modified by the user. (n=2, 1 government and 1 private)

HRS 2016 Pension Plan Detail Database

This Microsoft Access (.mdb) database contains the following tables of interest:

- *PlanInformation*. Contains pension plan information based on Summary Plan Descriptions or Department of Labor Form 5500 filing attachments (n=550)
- *Respondents*. Contains data used to calculate pension entitlements for HRS respondents, one record per plan/job/respondent. Includes Participant ID, Plan ID, sex, date of birth, marital status, employment hire/terminate dates, salary/wage information, voluntary contributions, and wage growth data. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2696)
- *Wages*. Contains wage information used in calculating pension entitlements, one record per job/respondent. Note: the respondent identifier key for this table, RespondentNumber, is the same as Household Identifier + Person Number. (n=2696)
- *SimulatedRespondents*. Contains seed respondent values for use with the simulated respondent feature of the Pension Estimation Program. These values may be modified by the user. (n=2, 1 government and 1 private)
- *SimulatedWages*. Contains seed wage value for use with the simulated respondent feature of the Pension Estimation Program. This value may be modified by the user. (n=2, 1 government and 1 private)