

HEALTH AND RETIREMENT STUDY

Restricted Data

Respondent Cross-Year Detail Earnings

Data Description

Updated through Consents/Matches as of the HRS 2022 Wave
Released Date: April 2026

To the Restricted Data Investigator: This restricted data set is intended for exclusive use by you and the persons specified in the *Agreement for Use of Restricted Data from the Health and Retirement Study* and/or the *Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study*. If there are any questions about this data set and its use, refer to the restricted data pages on the HRS Web site (<https://hrs.isr.umich.edu/data-products/restricted-data>). You can also contact the HRS RDA Help Desk via electronic mail (<mailto:hrsrdapplication@umich.edu>).

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1. Overview and Acknowledgments

The Health and Retirement Study (HRS) is a national longitudinal study of the economic, health, marital, and family status, as well as public and private support systems, of older Americans. The HRS is a rich source of longitudinal, cross-sectional data for researchers and policymakers who study aging. Funding for the Health and Retirement Study is provided by the National Institute on Aging at the National Institutes of Health (U01AG009740), with supplemental support from the Social Security Administration. The study is conducted by the Institute for Social Research (ISR) at the University of Michigan.

The HRS gratefully acknowledges the special assistance of the Social Security Administration's Office of Research and Statistics for their assistance in retrieving the administrative records of HRS respondents who gave consent for those records to be used for research purposes.

2. Obtaining the Data

2a. Access to Restricted Data

Although most HRS data sets are available to the public without restriction, certain HRS data sets contain sensitive respondent information and are only available under terms of a formal agreement negotiated between the researcher and HRS. Prospective users of HRS restricted data have two access options:

- [Virtual Desktop Infrastructure](#) (recommended)
- Traditional Licensing Agreement (deprecated)

For instructions on how to proceed, visit the [HRS Restricted Data](#) page or contact the HRS Restricted Data Applications Processing Team (hrrsdaapplication@umich.edu) by email.

2b. Restricted Data Agreement

This restricted data set is intended for exclusive use by you and the persons specified in the *Confidentiality Agreement for Use of Restricted Data from the Health and Retirement Study*. Traditional licensing agreements that include multiple users are also bound by the *Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study*.

2c. Publications Based on Restricted Data

Your restricted data agreement specifies that you will inform HRS of any papers, publications, or presentations based on this restricted data set. Please send a copy of such publications in PDF format via e-mail to hrrsquestions@umich.edu with "Attn: Papers and Publications" in the subject line. If you wish, you may include a bibliographical reference.

As an alternative, you may transmit publications in paper format by postal mail:

Health and Retirement Study
Attn: Papers and Publications
The Institute for Social Research
426 Thompson Street, 3450 ISR
Ann Arbor, Michigan 48104

3. Data Set Content

The *Respondent Cross-Year Detail Earnings* data set contains Master Earnings File (MEF) earnings data for 25,179 respondents derived from the permission sets as summarized below:

Table 1: Respondent Counts

Consent Year	Entry Cohort (Entry Year in Parenthesis)								Total
	HRS (1992)	AHEAD (1993)	CODA (1998)	WB (1998)	EBB (2004)	MBB (2010)	LBB (2016)	EGENX (2022)	
1992	3,281	11	0	0	0	0	0	0	3,292
1998	14	12	473	307	0	0	0	0	806
2000	5	7	56	30	0	0	0	0	98
2004	1,749	92	157	140	401	0	0	0	2,539
2006	50	12	390	181	56	0	0	0	689
2008	2,219	424	256	442	394	0	0	0	3,735
2010	1,308	246	112	172	656	1,047	0	0	3,541
2012	396	0	2	158	353	256	0	0	1,165
2014	259	0	0	103	222	231	0	0	815
2016	163	22	26	49	150	253	948	0	1,611
2018	305	24	66	114	216	201	282	0	1,208
2020	150	4	7	112	483	641	552	0	1,949
2022	642	9	24	381	683	777	688	527	3,731
Total	10,541	863	1,569	2,189	3,614	3,406	2,470	527	25,179

The data file contains one record per employer¹ per year for each consenting respondent who received wages during years 1978-2023,² and whose records were available in the MEF. See Appendix B for more information on cohort permission timing.

To help preserve respondent confidentiality, earnings data have been rounded to the nearest \$100, except for fields that were originally between \$0.01 and \$49.99, which have been recoded to “.n”. Entries that were originally coded as 0 remain as 0. Amounts greater or equal to \$250,000 or less than or equal to -\$250,000 were top/bottom coded. See Appendix A for further details.

¹ Employer identifiers are scrambled and are unique to each respondent.

² Detail earnings records for 1978 and 1979 are incomplete and should be used with caution, if at all.

4. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines for using this data set. If you have questions or concerns that are not adequately covered here or on our Web site, or if you have any comments, please contact us. We will do our best to provide answers.

4a. HRS Internet Site

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access public data or to find out more about restricted data products and procedures, visit the [HRS Web site](https://hrs.isr.umich.edu).

4b. Contact Information

If you need to contact us, you may do so by one of the methods listed below.

Internet: Help Desk at the HRS Web site (<https://hrs.isr.umich.edu/help>)

E-mail: hrsquestions@umich.edu

Postal Service:

Health and Retirement Study
The Institute for Social Research
426 Thompson Street, 3450 ISR
Ann Arbor, Michigan 48104

Appendix A: Data Management Notes

Table: Missing Data Codes			
Bottom/Top Code Category	SAS/Stata Special Missing	Numeric Missing	Numeric Recode
<= -\$500,000	.a	-999998	
-\$300,000 to 499,999	.b	-999997	
-\$250,000 to 299,999	.c	-999996	
-1 to -49	.m	-2	-25
1 to 49	.n	-1	25
\$250,000 to 299,999	.x	999996	272000
\$300,000 to 499,999	.y	999997	370000
>= \$500,000	.z	999998	1000000

To preserve respondent confidentiality, all data elements are rounded and top/bottom-coded. A code of zero (0) represents a true zero dollar amount. A code of “.n” represents an amount between 1 and 49 dollars, inclusive. A code of “.m” represents an amount between -1 and -49 dollars, inclusive. Amounts with an absolute value of 50 dollars or more were rounded to the nearest 100 dollars. An absolute value ending in 01 to 49 was rounded down, and a value ending in 50 to 99 was rounded up.

Amounts greater or equal to \$250,000 were recoded as follows:

\$250,000 to 299,999 = .x;
 \$300,000 to 499,999 = .y;
 >= \$500,000 = .z.

Amounts less than or equal to -\$250,000 were recoded as follows:

-\$250,000 to -299,999 = .c;
 -\$300,000 to -499,999 = .b;
 <= -\$500,000 = .z.

SPSS users may wish to convert the SAS special missing codes to SPSS equivalents. The following code fragment serves as an example:

```
* input WTOTCOMP as a string variable named xWTOTCOMP .
compute WTOTCOMP=0.
compute WTOTCOMP=number(xWTOTCOMP, F10).
recode xWTOTCOMP (convert) ('.n'=25) ('.x'=999996)
('y'=999997) ('z'=999998) into WTOTCOMP.
missing values WTOTCOMP (999996, 999997, 999998).
desc WTOTCOMP.
execute.
```

Appendix B: Cohort Permission Status

This following table only shows the rules through the 2016 wave. In waves 2016 and beyond, respondents are asked for permission in enhanced face-to-face interviews if they have not been asked, if they have not consented, or if their prior consents have expired. Additionally, all members of each new cohort are asked in their baseline interviews.

Cohort	1992/94/96	1993/95	1998/2000	2004	2006: Asked If Face-to-face and...	2008: Asked if Enhanced Face-to-face and...	2010: Asked if Enhanced Face-to-face and...	2012: Asked if Enhanced Face-to-face and...	2014: Asked if Enhanced Face-to-face and...	2016: Asked if Enhanced Face-to-face and...
New spouses or never-interviewed R in any cohort	Asked all	Asked all	Asked all	Asked all	Asked all	Asked all	Asked all	Asked all	Asked all	Asked all
AHEAD (Born <=1923)	NO	Asked all	NO	NO	R was not asked in 2004	R refused, did not provide valid permission information, was not asked, or was non-response in 2004 or 2006	R refused, did not provide valid permission information, was not asked, or was non-response in 2006 or 2008	R refused, did not provide valid permission information, was not asked, or was non-response in 2006, 2008 or 2010	R refused, did not provide valid permission information, was not asked, or was non-response in 2006, 2008, 2010 or 2012	R refused, did not provide valid permission information, was not asked, or was non-response in 2006, 2008, 2010, 2012 or 2014
CODA (1924-1930)	NA	NA	Asked all	NO						
HRS (1931-1941)	Asked all	NO	NO	Asked all						
WAR BABY (1942-1947)	NA	NA	Asked all	Only asked refusers						
EARLY BOOMERS (1948-1953)	NA	NA	NA	Asked all						
MID BOOMERS (1954-1959)	NA	NA	NA	NA	NA	NA	Asked all			
LATE BOOMERS (1960-1965)	NA	NA	NA	NA	NA	NA	NA	NA	NA	Asked all

B1. Source Information

As seen in the previous table, the inputs to this dataset were received at different points in time over the past decade from the Social Security Administration:

- In 1992, 1994 or 1996 for HRS cohort members
- In 1998 or 2000 for CODA and War Baby cohort members as well as new spouses
- In 2004 for EBB and HRS cohort members, new spouses, and War Baby 1998/2000 refusers
- In 2006, 2008, 2010, 2012, 2014, 2016, 2018, and 2020 for
 - New sample members (MBB, LBB, EGENX)
 - Respondents (in all older cohorts) interviewed enhanced face-to-face who were not asked previously or refused or were non-response.

B2. Information Received from SSA in Fall 2025

<i>Consent Wave</i>	<i>Summary Earnings</i>	<i>Detail Earnings</i>	<i>Benefits (MBR and PHUS)</i>	<i>Form 831 SSI</i>	
2006	No	No	No	No	
2008					
2010			Yes, through 2022	Yes, through 2022	
2012					
2014					
2016	Yes, through 2022	Yes, through 2022	Yes, through 2024	Yes, through 2024	
2018	Yes, through 2023	Yes, through 2023			
2020					
2022					

B3. Limits for Information Obtained Through Respondent Consent Forms

1. Prior to 2006, respondent permissions were based on separate agreements between HRS and SSA. This meant that information was obtained only for the time period and respondent cohort(s) covered by the agreement.
2. In 2006 the terms of the consent form were altered, allowing HRS to obtain updates of earnings and benefits data for all years up to and including the current year. The term of these consents was defined as year of signing through 2030.
3. In 2018 the respondent consent form³ MOA terms were revised, limiting earnings permissions to year of signing through Survey Year + 6, and benefits permissions to year of signing through Survey Year + 12.
4. In future years, post-2004 respondents will need new earnings/benefits data consents once their Survey Year + 6/+12 anniversary has been reached.

³ In 1998 through 2014, HRS-SSA agreements included provisions for obtaining benefits and earnings information for deceased spouses. The deceased spouse option was dropped in 2016.