Annex 4 – English versions of explanatory notes

Ad hoc module 2006 will be surveyed on the first visit (resp. according to quarter of inclusion of Census Area to sample) in the household in all quarters 2006.

Target group presents persons aged 50-69 who
a) have job
b) their last job finished when they were at least 49 years-old

The questionnaire for AHM 2006 is integrated into LFS program equipment. Selection of respondents is controlled by program. Survey of AHM 2006 should follow the regular LFS survey.

F0601 - Age of termination of all economic activities
The target of the question is not the entrance to retirement but the age of termination of all economic activities on the labour market. The answer may significantly differ from the age of entrance to the retirement.
E.g.: Person in retirement aged – 64 years old that seeks job will declare the age when s/he plans to finish all job and activities.

If respondent is not able to define precise age, interviewer indicates “don’t know” and continues to question F0602.

Code 0 is used for persons that has terminated their jobs and do not intend to return or seek another job.

F0603 – Status after termination of last job
Question identifies status immediately after termination of last job. The status depend on self-declaration of respondent.
E.g.: Working retiree who finishes his/her job due to healthy conditions, declares code 3.

For purpose of this question there are persons on retraining (within PES), persons waiting for job that starts later etc. considered as unemployed.
Question is fulfilled automatically for persons that left last job to retirement.

F0604 – Reason for leaving to retirement
Question is focused on identification of main reason why person terminated his/her job and left to retirement (financial, personal, legal and other reasons). The reason valid in the moment of leaving must be declared (e.g. person went to retirement because s/he was dismissed and now s/he does not work due to healthy conditions – the reason is “being dismissed”).

Code 1 includes the most frequent case when respondent reached retirement age and was allowed to continue in job but s/he preferred termination of working activity.

Code 2 excludes cases when person voluntarily terminated his/her job.

Code 3 – According to Ministry of Labour and Social Affair this situation may occur only for special occupations such as pilots and in the past for miners and smelters in dusty operations, special profession in chemical industry etc. This code can be used only for persons that were
not transferred on another job and were dismissed/left to retirement when reached the maximum age!!

Code 5 – Respondent had to care for child or dependent person (e.g. because of lack of relevant facilities – nursery, kindergarten, home care etc.).

Code 6 – The reasons connected with job such as inconvenient type of contract, healthy or safety risk, stressful or too demanding job, insufficient knowledge and skills for performance, low salary, behaviour of employer or boss etc.

Code 7 includes profitable conditions for leaving to early retirement, compensation from employer (golden stock) etc.

Code 8 includes personal reasons for leaving job (excl. care for child or dependent person). Further persons that do not need or want to work will be coded with this code.

If respondent cannot choose the main reasons, s/he will indicate the first possible code from the supply of codes (hierarchy must be obeyed).

**F0605-F0607 – Factors that influence staying in job**
Questions monitor whether these factors would influence termination of job or staying in the job. Code 1 is used also in case when more suitable arrangement would be one of more factors that influence decision of respondent.

For question ExZamDuv the more suitable arrangement of working time includes e.g. part-time, lower number of weekly hours, teleworking, change of beginning and end of working time etc.

Questions are not put to persons that declared before that they were dismissed or their temporary job finished.

**F0608 – Starting age of receiving pension**
Here, the pension means exclusively pension of regular retirement, i.e. early retirement or disability retirement are not considered. The question identifies the completed age of respondent.
E.g.: Person born in May 1940 started to receive pension in March 2004. The completed age of person is 63.

**F0609 – Claim to retirement**
Respondent who is close to retirement age usually has an idea whether s/he has legal claim to retirement or not.
In the questionnaire there are used controls on age of respondent regarding the valid legislature concerning retirement.

**F0610 – Receiving disability pension**
The question monitor exclusively disability retirement and distinguishes codes 1 and 2 for partial and full disability retirements.
Question is fulfilled automatically when answer implies from question ObvPost.

**F0611 – Receiving special benefits**
Question monitors exclusively the social benefits that are paid as lump-sum or to aged or disabled persons or to special cases in social need.
In every case it is necessary to explain respondent that it excludes retirement pensions, unemployment benefits, social benefits such as parental benefit, child allowance, transport and housing benefit, birth grant or death allowance.

It consists of:
A) Benefits due to social need
Periodical or lump-sum (cash or material) benefits determined to maintain basic life needs are paid in case that net cash income of citizen (or household) is lower than subsistence level and it is impossible to increase the income regarding the age, healthy conditions or other serious reasons with own effort of respondent.
They complement insufficient income of household usually up to subsistence level, just on the base of individual evaluation of social and economical situation (incl. property relations).
They might be provided also in lower or higher amount than the subsistence level if there are proved higher life needs implying from diet catering recommended by doctor, higher living costs etc.

Benefits are provided on the base of application by authorized municipalities according to legal act on social needs. Citizen with insufficient income must document all incomes and also living costs etc.
Appeal against the decision of the relevant administrative authority on social care benefit is to be submitted to relevant regional office through municipality that decided on benefit.

B) Social care benefits for aged persons
1. Lump-sum claimless benefits
Lump-sum cash benefits to citizens placed in institute for social care, mental home or sanatorium for long-term disease for settlement of short-term liabilities (Municipality).
Contribution for recreation and spa care to inactive retirees who pay for it from own sources.
The amount is bound onto level of retirement pension (Authorized municipality).
Contribution to expenditures connected with public mass transport to persons in social need who participate in recreation and spa care, possible up to the level of actual costs (Authorized municipality).
Lump-sum cash and material benefits to citizens in social need on settlement of exceptional necessary expenditures that they cannot settle from normal income (Municipality).
Material social care benefits to citizens in social need on their daily life needs that they cannot ensure by themselves due their age, healthy conditions or loneliness (Municipality).
Contribution to establish household phone to citizens in social need who receive increased retirement pension due to infirmity, up to 1000CZK (Municipality).
Contribution on change in phone connection to citizens in social need who receive increased retirement pension due to infirmity, up to 1000CZK (Municipality).

2. Monthly claimless benefits
Contribution on common catering, determined to settle part of costs paid by aged persons in social need for common catering, amounts to 12CZK for a lunch, in exceptional cases increased by up to 15% (Municipality).
Contribution on increased life costs of citizens who permanently use orthopaedic, compensatory or other aids if their usage implies higher expenditures. The monthly amount equals up to 200CZK (Authorized municipality).
Contribution for operating phone to persons aged more than 70 who live lonely. The amount is possible to set up even up to full settlement of monthly phone charge (Authorized municipality).

C) Benefits of social care for heavily disabled citizens

1. Lump-sum benefit (claim on its provision)
   Contribution on arrangement of flat determined to citizens with heavy impairments of supporting or locomotive organs and for citizens fully or practically blind to remove barriers in their flat. Contribution may be provided as 70% of proved costs on arrangement, at most 50 000CZK (Municipality with extended competence).
   Contribution on individual transport determined to citizens with heavy impairments of supporting or locomotive organs, citizens fully or practically blind and parents of dependent children treated for tumorous disease or hemoblastosis who do not own motor vehicle or are not transported by motor vehicle that is supported by benefit on operation of motor vehicle. The yearly contribution amounts to 6 000 CZK (Municipality).
   Contribution on purchase of motor vehicle determined to citizens with heavy impairments of supporting or locomotive organs and for parents of dependent children who have heavy impairments of supporting or locomotive organs, who are fully or practically blind or who are heavily mentally disabled. The amount is up to 100 000CZK (Municipality with extended competence).
   Contribution on total repair of motor vehicle determined to citizens with heavy impairments of supporting or locomotive organs and for parents of dependent children who have heavy impairments of supporting or locomotive organs, who are fully or practically blind or who are heavily mentally disabled. The amount is up to 60 000 (Municipality with extended competence).
   Contribution on special arrangement of motor vehicle determined to citizens with heavy impairments of supporting or locomotive organs who drive a motor vehicle by themselves and regarding to their disability needs the arrangement of motor vehicle. Contribution is provided as the full costs of such arrangement if it satisfies the condition for concurrency of three benefits within 10 consecutive calendar years that amounts at most to 200 000 CZK (Municipality with extended competence).
   Contribution on operation of motor vehicle determined to motor vehicle-operators (holders) whose healthy status justifies exceptional advantages of 2nd and 3rd degree, who use this motor vehicle for their regular transport or for motor vehicle-operators who use this motor vehicle for regular transport of their relatives whose healthy status also justifies exceptional advantages of 2nd and 3rd degree or for parents of dependent children treated for tumorous disease or hemoblastosis. The amount is for disabled and disabled with guide set up as 3 920 CZK, 2 140 CZK respectively for single-track vehicles and 9 124 CZK, 5 624 CZK respectively for dual-track vehicles (Municipality with extended competence).

2. Monthly benefit (with claim on its provision)
   Contribution on settlement for usage of barrier-free flat determined to citizens with heavy impairments of supporting or locomotive organs who live in special flat. The monthly amount is up to 400 CZK (Authorized municipality).

3. Monthly claimless benefit
   Contribution on increased life costs determined to citizens who permanently use orthopaedic, compensatory or other aids if their usage implies higher expenditures. The monthly amount is 200 CZK (Authorized municipality).
Contribution on increased life costs determined to fully or practically blind citizens who are consecutively economically active or prepare for their job through consecutive training or study. The monthly amount is 200 CZK (Authorized municipality).

Contribution on phone operation determined to citizens in social need with heavy disability. The amount might be set up even up to full settlement of basic monthly charge for phone usage (Authorized municipality).

Contribution on settlement for usage of garage determined to citizens with heavy impairments of supporting or locomotive organs who live in special flat (Authorized municipality).

Contribution to fully or practically blind citizens determined for settlement of food for guide-dog in ownership of the citizen. The monthly amount is 800 CZK (Authorized municipality).

4. Exceptional advantages for disabled citizens
The exceptional advantages for heavily disabled citizens determined to citizens whose moving ability or sense of direction is fundamentally limited. There are three degrees – disabled, heavily disabled, heavily disabled with guide. The exceptional advantages are to be proved with the license of exceptional advantages (Municipality with extended competence).

Interest-free loans for heavily disabled citizens in adverse life situation that might be overcome with this loan and cannot get loan in any other way. The maximum amount of loan is 20 000 CZK. In case that heavily disabled citizen satisfies conditions for contribution on purchase of motor vehicle, it is possible to provide interest-free loan up to 40 000 CZK. It is a lump-sum claimless tool of social care in competence of relevant municipality with extended competences that is provided from financial sources of municipality (Municipality with extended competence).

5. Lump-sum claimless benefits
Contribution on expenditures connected with public mass transport determined to persons in social need who participate in recreation and spa care, up to level of actual costs. It is a lump-sum claimless benefit (Authorized municipality).

Lump-sum contribution for purchase of special aids determined to heavily disabled citizens to remove, reduce or overcome consequences of their disability. Maximum amount is set up as a percentage of price of aid (Municipality with extended competence).

Contribution on settlement of expenditures connected with training and delivery of guide-dog for fully or practically blind citizens. Contribution might be provided up to the level of usual costs, i.e. recently up to 210 000 CZK (Municipality with extended competence).

Contribution to establish household phone determined to citizens in social need who were provided with exceptional advantages of 3rd degree, up to 1000 CZK (Municipality).

Contribution on change in phone connection determined to citizens in social need who were provided with exceptional advantages of 3rd degree, in case of change in the group connection onto station with single or two-party connection, up to 1000 CZK (Municipality).

Lump-sum cash benefits determined to citizens who are placed in institute for social care, mental home or sanatorium for long-term disease for settlement of short-term liabilities (Municipality).

Contribution when leaving the facility determined to inmates of institute for disabled youth, for disabled youth with affiliated mental handicap, for disabled youth with several impairments, for citizens with reduced working ability who completed training or study for job. The amount is 7 000 CZK, in exceptional cases up to 15 000 CZK (Municipality).

Lump-sum cash and material benefits determined to citizens who are in social need for settlement of exceptional necessary expenditures that they cannot pay from their own recent income (Municipality).
Material benefit determined to citizens who are in social need to satisfy their daily life needs that they cannot ensure by themselves due to their healthy condition, age or loneliness (Municipality).

Contribution on common catering amounted to 12 CZK per a lunch, in exceptional cases increased by up to 15% respectively (Municipality).

Contribution on recreation and spa care determined to inactive retirees who pay for recreation and spa care from their own sources. The amount is bound to the level of retirement pension (Authorized municipality).

D) Benefits of social care in special cases

1. Claimless benefits to citizens who need special help
Cash and material benefits to citizens who temporarily occurred in outstandingly difficult conditions or live in such conditions determined to overcome adverse life situation, especially when finding a job, increasing the culture of living, dealing with raising and education of child, using a leisure time and getting culture improvement. The amount depends on the judgement of authority. It might be either lump-sum or periodical monthly benefit if the conditions of social need are satisfied.

Cash benefit to citizens who temporarily occurred in outstandingly difficult conditions due to natural disaster or fire, determined to immediate help in overcoming consequences of these events. The amount is provided with respect to property relations of citizen and his/her family up to 30 000 CZK. It is a lump-sum benefit that is not bound on social need.

2. Claimless benefits to socially unadapted citizens
Cash and material benefits to ensure their life needs while satisfying conditions of social need, determined as the first aid to citizens released from execution of punishment of confinement, to citizens who are treated in criminal proceedings or for whom the execution of punishment of confinement was postponed, to citizens dependent on alcohol and drugs, to citizens living in undignified way of life and to citizens released from school facilities for hospital or protective education. The benefit is up to 1000 CZK.

The interest-free loans to citizens who are in adverse life situation. The maximal amount is 20000 CZK.

3. Claimless benefits to citizens who are provided with social care in health-care facilities
Lump-sum and periodic cash benefit to citizens in social need, determined on settlement of basic personal needs of citizen (Municipality with extended competence).

4. Lump-sum cash benefit provided by Municipality with independent operation
The municipality may in its independent operation provide lump-sum cash benefit to citizens who appeared in outstandingly adverse social conditions.

F0612 – Reason for staying in the job
The purpose of the question is to identify motif of respondent for performance of job.
If respondent cannot choose between codes 1 and 2, than code 1 is selected.

Code 2 includes the cases when respondent’s income covers daily costs of households unlike the possible retirement pension.

F0613 – Worked years
The target is to gain the approximate length of employment (incl. self-employment). The question is the same as question C75 in questionnaire of EU-SILC.
One should declare the number of years that s/he has/had worked as employee or self-employed since the beginning of his/her first regular job. The first significant job excludes holiday job of students after which they usually return to school, part-time jobs at the time of study, occasional job, seasonal job etc. The judgement of participation in working process, especially in disputable cases, depends on personal feelings of respondent.

This period includes:
- maternity leave
- sick leave for injury or illness
- reduction of work by employer due to technical or economic reasons

This period excludes:
- parental leave
- period of inactivity or unemployment
- period of military or community service

F0614 – Reduction of working time before termination of all activities
Questions F0614 and F0615 are focused on changes of working time in the period preceding the termination of all working activities. Termination of working activities is understood in the same way as for question F0601.

In our conditions this reduction will involve especially persons in retirement age who “make up” for their future postponed retirement and working retirees. For these persons one can assume that regarding to their age, healthy conditions etc. they prefer to reduce their working time and gradually stop working at all. Vice-versa, for persons in pre-retirement age one can assume that majority of these persons is not interested in the reduction due to its financial disadvantages.

In the EU countries there are labour market policy measures that allow elderly to work part-time for salary corresponding to full-time and therefore maintain higher employment rate of these persons. In the CZ such measure does not exist.

The question is put to persons in employment and to the persons who terminated all activities. For unemployed or inactive persons who have not terminated activities on the labour market there is an automatic answer (F0614=2, F0615=3).

For persons in employment: The question is focused on their intention to reduce their working time. It might concern last, current or future job that respondent intend to perform before termination of all activities.
For persons who terminated all activities: The question identifies whether the person realized such reduction before complete termination of working activities.

The cases when respondent worked majority of his working life for part-time or when the employer forced him to reduction are out of the scope of this question (code 2).

F0615 – Plan to reduce working time before termination of all activities
The question identifies whether respondent intend to do such reduction in following 5 years. The question is not put to persons who declared in F0601 that they had already terminated all working activities.