

HRS 2006 — SECTION W:  
EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 1

FINAL VERSION 1 — 12/11/2006

\*\*\*\*\*

NOTE ABOUT BRANCHPOINTS:

WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX, THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.

\*\*\*\*\*

NOTE ABOUT COLORS:

ALL QUESTION TEXT IN BLACK IS FOR THE CORE INTERVIEW.

ALL QUESTION TEXT IN FUCHSIA IS FOR THE EXIT INTERVIEW. ALSO IN FUCHSIA IS ALL OTHER TEXT THAT IS SPECIFIC TO THE EXIT INTERVIEW BUT NOT TO THE CORE.

OTHERWISE, BLACK TEXT FOR CODEFRAMES, INTERVIEWER INSTRUCTIONS, JUMPS AND BRANCHPOINTS, ETC. CAN APPLY TO BOTH THE CORE AND THE EXIT INTERVIEW UNLESS SPECIFIED OTHERWISE OR THERE IS AN EXIT ALTERNATIVE.

ON A BLACK-AND-WHITE HARD COPY OF THE DOCUMENT, THE FUCHSIA TEXT WILL APPEAR SOMEWHAT LIGHTER THAN THE ORIGINAL BLACK.

\*\*\*\*\*

NOTE ABOUT EXIT INTERVIEW Rs:

ANY NEW SPOUSE/PARTNER THAT AN EXIT INTERVIEW R ACQUIRED SINCE HIS/HER LAST INTERVIEW IS IGNORED FOR THE PURPOSES OF THIS INTERVIEW.

FOR AN EXIT INTERVIEW A "NEW INTERVIEW R" IS A SPOUSE/PARTNER WHO WAS REPORTED IN A PREVIOUS WAVE BUT WHO HAS NEVER BEEN INTERVIEWED.

\*\*\*\*\*

**HRS 2006 — SECTION W:**  
**EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 2**

FINAL VERSION 1 — 12/11/2006

**MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES \***

THIS IS A **REINTERVIEW R** (Z076=1);  
THIS IS A **NEW SPOUSE/PARTNER** OF A REINTERVIEW R (Z076=0);  
THIS IS A **NEVER INTERVIEWED R** or A **NEW INTERVIEW R** (Z076=5)  
THIS IS A **SECOND REPEAT POST-EXIT INTERVIEW** (Z145=4)

THIS IS A **SELF INTERVIEW** (A009=1);  
THIS IS A **PROXY INTERVIEW** (A009={2 or 3}) or (A009 NOT 1);  
**PROXY REPORTER IS SURVIVING SPOUSE** (A009=2);  
**PROXY REPORTER IS NON-SPOUSE** (A009=3)

R's **FIRST NAME** (per Respondents1X058AFName = X058)

R's **LAST IW MONTH** (per Z092), **YEAR** (per Z093)

-----  
**EVENT HISTORY VARIABLES:**

R's **LAST IW SPOUSE/PARTNER IS NO LONGER LIVING** (A023=5);  
R's **LAST IW SPOUSE/PARTNER IS STILL LIVING** (A023 NOT 5)

R AND SPOUSE/PARTNER WERE **STILL MARRIED/PARTNERED WHEN S/HE DIED** (A202=1);  
R AND SPOUSE/PARTNER WERE **NOT STILL MARRIED/PARTNERED WHEN S/HE DIED**  
(A202=5)

R BECAME **WIDOWED** SINCE R'S LAST IW (B058=2);  
R BECAME **DIVORCED** SINCE R'S LAST IW (B058=1)

R BECAME **SEPARATED** SINCE R'S LAST IW (A034=2)

R **CURRENTLY LIVES IN NURSING HOME** (A167\_A028=1)

R **HAD NURSING HOME STAY** SINCE R's LAST IW (N114=1)

R's **NURSING HOME STAY WAS NOT CONTINUOUS SINCE ENTERED** (N116 NOT 996)

THIS IS THE **FIRST R** (SCV.XR1\_R2=FIRST)

REINTERVIEW R **HAS NEW SPOUSE/PARTNER** (SCVXNewSP={1 or 3})

R **HAD HEART ATTACK** SINCE R'S LAST IW (C040=1)

R **HAD STROKE** SINCE R's LAST IW ({C053=1 and {Z106 NOT 1}} or C062=1)

R REPORTS **NEW CANCER** SINCE R's LAST IW (C029 WAS ASKED)

R **CHANGED MAIN RESIDENCE** SINCE R's LAST IW (X033 NOT 5)

**MOTHER DIED** (F001=5)

**FATHER DIED** (F011=5)

\* A variable fieldname and code reference is shown at its first occurrence in the questionnaire, but in some cases, especially when it is common, is not shown after that.

\*\*\*\*\*

HRS 2006 — SECTION W:  
EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 3

FINAL VERSION 1 — 12/11/2006

W301 BRANCHPOINT: IF THIS IS A NEW INTERVIEW R (Z076 NOT 1), GO TO W303  
BRANCHPOINT

IF THIS IS A CORE INTERVIEW *and* IF NONE OF THE EVENTS SHOWN  
IN THE LIST, BELOW, HAPPENED TO R SINCE R'S LAST INTERVIEW  
(W313=0);

{I.E., IF

{ ({A023 NOT 5} or {A202 NOT 1})

and {B058 NOT 2})

and ({A028 and N114} NOT 1} or {N116=996})

and ({SCVXNewSP {NOT 1 and NOT 3}}

or {SCV.XR1\_R2 NOT FIRST})

and ({A023=5 or {A202 NOT 5}} and {A034 NOT 2}

and {B058 NOT 1})

and (C040 NOT 1)

and ({C053 NOT 1} or Z106=1}

and {C062 NOT 1})

and (C029 = EMPTY)

and (X033=5)

and ({F001 and F011} NOT 5)}},

ASSIGN "9. NO EVENT" TO W301 AND GO TO W303 BRANCHPOINT

IF THIS IS AN EXIT INTERVIEW, ASSIGN "9. NO EVENT" TO W301  
AND GO TO END OF SECTION W BRANCHPOINT

IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO  
END OF SECTION W BRANCHPOINT

HRS 2006 — SECTION W:

EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 4

FINAL VERSION 1 — 12/11/2006

NOTE: ANY OF THE FOLLOWING EVENTS WILL APPEAR AT W301 IF [IT WAS/THEY WERE] REPORTED TO HAVE OCCURRED SINCE R's LAST INTERVIEW (NOEVENT=1). THE LIST BELOW ALSO SHOWS THE QUESTION/RESPONSE REFERENCE FOR THE EVENT. IF NO EVENT MEETS THE REQUIRED CRITERION/CRITERIA (NOEVENT NOT 1), W301 IS ASSIGNED A VALUE OF "9. NO EVENT" AND JUMPED.

CORE:

1. Death of spouse/partner ({A023=5 and A202=1} or B058=2)
2. Nursing home stay ({A028 or N114}=1} and {N116 NOT 996})
3. New Spouse/Partner (SCVXNewSP={1 or 3} and SCV.XR1\_R2 = FIRST)
  
4. Divorced/Separated from SP/P ({A023 NOT 5} and A202=5  
or A034=2 or B058=1)
5. Heart Attack (C040=1)
6. Stroke ({C053 =1 and {Z106 NOT 1}} or C062=1)
7. Cancer (C029 WAS ASKED)
8. Residential Move, Main Residence (X033 NOT 5)
10. Mother Died (F001=5)
11. Father Died (F011=5)

W301 (Tag#=EVC1)

[IWER: IF ONLY ONE EVENT DISPLAYED, DO NOT ASK QUESTION BUT CHOOSE THE NUMBER AND GO TO NEXT SCREEN.]

You mentioned the following events happened since [R's LAST IW MONTH (per Z092), YEAR (per Z093)/in the last two years].

Which of these happened first,...next,...next?

[IWER: IF AN EVENT IS MENTIONED MORE THAN ONCE ENTER THE INFORMATION IN AN F2 COMMENT.]

1. DEATH OF SPOUSE/PARTNER	2. NURSING HOME STAY	3. NEW SPOUSE/PARTNER	
4. DIVORCED/SEPARATED FROM SP/P	5. HEART ATTACK	6. STROKE	7. CANCER
8. RESIDENTIAL MOVE, MAIN RESIDENCE	9. NO EVENT	10. MOTHER DIED	11. FATHER DIED
98. DK	99. RF		

NOTE: ANY EVENT CAN BE SELECTED IN COMBINATION WITH ANY OTHER EVENT(S). "9. NO EVENT" NEVER APPEARS ON THE SCREEN; IT IS SHOWN HERE TO INDICATE THAT THIS CODE WILL BE ASSIGNED IF NO EVENTS OCCURRED (W313=0) (SEE W301 BRANCHPOINT).

HRS 2006 — SECTION W:  
EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 5

FINAL VERSION 1 — 12/11/2006

W303 BRANCHPOINT: IF THIS IS A LIVING PROXY INTERVIEW (A009={2 or 3}),  
GO TO W311

W303

Do you regularly use the World Wide Web, or the Internet, for sending and receiving e-mail or for any other purpose, such as making purchases, searching for information, or making travel reservations?

1. YES

5. NO

8. DK

9. RF

W311

IWER: ENTER CURRENT MODE OF INTERVIEW

1. TELEPHONE

2. FACE-TO-FACE

GO TO W307 (ASSIST)  
(AFTER W312)

W306 BRANCHPOINT: IF THIS IS A LIVING PROXY INTERVIEW (A009={2 or 3}),  
GO TO W307 (ASSIST) (AFTER W312)

IF MODE IS NOT FACE-TO-FACE IW AT THIS POINT (W311 NOT 2), GO TO W307 (ASSIST) (AFTER W312)

IF THIS IS A NEW SPOUSE/PARTNER (Z120=EMPTY), CONTINUE ON TO W306

IF WAS NOT SELECTED TO BE ASKED FOR SOCIAL SECURITY NUMBER (Z120=5), GO TO W307 (ASSIST) (AFTER W312)

*NOTE: A DIFFERENT ONE-HALF OF THE RELEVANT SAMPLE IS DESIGNATED FOR A FACE-TO-FACE INTERVIEW IN 2006 AND 2008, SO THAT OVER THE TWO WAVES THE ENTIRE SAMPLE OF RESPONDENTS RECEIVES A FACE-TO-FACE INTERVIEW.*

HRS 2006 — SECTION W:  
EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 6

FINAL VERSION 1 — 12/11/2006

W306

One of the most important parts of our study is to understand the financial situations of people in their retirement years. This is an important and challenging part of our research, and in order to obtain complete data for this research, we are asking our participants to complete a form authorizing us to obtain social security data on earnings and benefits.

We want to assure you that the Health and Retirement Study is committed to taking the utmost care to protect the confidentiality of any information you give us, including the information on this form. Please take a minute to read the form.

[IWER: HAND FORM TO R. GIVE R TIME TO READ THE FORM, THEN EXPLAIN IT AND ANSWER ANY QUESTIONS AS NEEDED.]

(I have a letter here from the Social Security Administration describing the purpose of our research and supporting our research efforts. Please take a minute to read it.)

IF THIS IS A REINTERVIEW R:

You may have been asked to provide this consent to us in the past. We are asking now that you allow us to update our records in order to obtain additional data from the Social Security Administration.

[IWER: PRESS 1 TO CONTINUE]

1. CONTINUE

W310

For the study's research purposes, would you authorize us to obtain your history of earnings and benefits administered by the Social Security Administration?

[IWER: ENTER LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS per X081] ON BLUE FORM AND GIVE R THE FORM AND THE PREPAID MAILER IF THE R WILL BE MAILING IT BACK.]

[IWER: USE BLUE FORM FOR R'S OWN SOCIAL SECURITY NUMBER. ADDITIONAL GREEN FORM IS USED FOR DECEASED SPOUSE ONLY.]

1. RESPONDENT AGREES - SIGNED  
FORM OBTAINED BY INTERVIEWER

3. RESPONDENT AGREES - FORM  
LEFT WITH R

4. RESPONDENT  
REFUSED

5. RESPONDENT NOT  
ABLE TO GIVE CONSENT

9. RESPONDENT UNDECIDED -  
FORM LEFT WITH R

NOTE: NEITHER DK NOR RF ARE ALLOWABLE RESPONSES, EXCEPT INSOFAR AS CODE "4. RESPONDENT REFUSED" SUBSTITUTES FOR THE USUAL CODE "9. REFUSED".

W309 BRANCHPOINT: IF R {IS CURRENTLY MARRIED or IS SEPARATED or HAS NEVER BEEN MARRIED (B063 {NOT 1 and NOT 3 and NOT 6})}, GO TO W307 (ASSIST) (AFTER W312)  
  
IF R IS WIDOWED (B063=5), GO TO W312

W309

Researchers are also interested in obtaining authorization from our study participants who may be eligible to receive Social Security benefits from a deceased husband or wife. Were you ever married to someone who is now deceased?

1. YES

5. NO

8. DK

9. RF

GO TO W307 (ASSIST) (AFTER W312)

HRS 2006 — SECTION W:  
EVENT HISTORY, INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 8

FINAL VERSION 1 — 12/11/2006

W312

For the study's research purposes, would you authorize us to obtain your deceased spouse's history of earnings and benefits administered by Social Security?

[IWER: ENTER LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS per X081] ON GREEN FORM AND GIVE R THE FORM. EXPLAIN FORM AND ANSWER QUESTIONS AS NEEDED.]

[IWER: GREEN FORM IS USED FOR DECEASED SPOUSE ONLY]

1. RESPONDENT AGREES - SIGNED  
FORM OBTAINED BY INTERVIEWER

3. RESPONDENT AGREES - FORM LEFT WITH R

4. RESPONDENT REFUSED

5. RESPONDENT NOT ABLE  
TO GIVE CONSENT

9. RESPONDENT UNDECIDED  
- FORM LEFT WITH R

NOTE: NEITHER DK NOR RF ARE ALLOWABLE RESPONSES, EXCEPT INSOFAR AS CODE "4. RESPONDENT REFUSED" SUBSTITUTES FOR THE USUAL CODE "9. REFUSED".

W307. W ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION W — EVENT HISTORY/INTERNET USE/SOCIAL SECURITY PERMISSION?

1. NEVER

2. A FEW TIMES

3. MOST OR ALL OF THE TIME

4. THE SECTION WAS DONE BY  
A PROXY REPORTER

5. NO QUESTIONS ASKED IN  
SECTION W

END OF SECTION W BRANCHPOINT: IF THIS IS A SELF INTERVIEW (A009=1),  
GO TO MODULES (NEXT SECTION)

IF THIS IS A LIVING PROXY INTERVIEW (A009={2 or 3}), JUMP BACK  
TO SECTION D AND ASK RELEVANT QUESTIONS OF THE PROXIED R

OTHERWISE, IF THIS IS NOT A SELF INTERVIEW (A009 NOT 1),  
GO TO END OF INTERVIEW

END OF SECTION W