

HRS 2008 — SECTION W:
INTERNET USE & SOCIAL SECURITY PERMISSION — PAGE 1

FINAL VERSION 3 — 9/23/2009

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.

MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A REINTERVIEW R (Z076=1)

THIS IS A SELF INTERVIEW (A009=1);
THIS IS A PROXY INTERVIEW (A009={2 or 3});
PROXY REPORTER IS SURVIVING SPOUSE (A009=2);
PROXY REPORTER IS NON-SPOUSE (A009=3)

R's FIRST NAME (per Respondents1X058AFName = X058)

R ELIGIBLE TO BE ASKED FOR SOCIAL SECURITY NUMBER THIS WAVE (Z120=1)
R NOT ELIGIBLE TO BE ASKED FOR SOCIAL SECURITY NUMBER THIS WAVE (Z120=5)

HH ASSIGNED ENHANCED TELEPHONE IW (X090=1)
HH ASSIGNED ENHANCED FACE-TO-FACE IW (X090=3)

THIS IS A FINANCIAL R (X007={1 or 3})

HH OWNED PRIMARY RESIDENCE LAST IW (X079=1)
HH OWNED SECONDARY RESIDENCE LAST IW (X032=1)

HH NO LONGER LIVES IN LAST IW PRIMARY RESIDENCE or R DID NOT SAY
(A071={5 or 8 or 9})
HH NO LONGER LIVES IN LAST IW SECONDARY RESIDENCE or R DID NOT SAY
(A073={5 or 8 or 9})

R IN NURSING HOME NO LONGER HAS LAST IW PRIMARY RESIDENCE or R DID NOT SAY
(A070={5 or 8 or 9})

HH DOES NOT OWN CURRENT PRIMARY RESIDENCE (H004 NOT 1)
HH DOES NOT OWN PRIMARY RESIDENCE FARM/RANCH (H008 {NOT 1 and NOT 2})
HH DOES NOT OWN PRIMARY RESIDENCE MOBILE HOME (H014 {NOT 1 and NOT 4})
HH DOES NOT OWN CURRENT SECONDARY RESIDENCE (H151 NOT 1)

HH DOES NOT REPORT HAVING MORTGAGE ON 1ST RESIDENCE (H024 {NOT 1 and NOT 2})
HH DOES NOT REPORT HAVING MORTGAGE ON 2ND RESIDENCE (H170 {NOT 1 and NOT 2})

R IS MARRIED (B063=1)
R IS SEPARATED (B063=3)
R IS WIDOWED (B063=5)
R HAS NEVER BEEN MARRIED (B063=6)

* 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.

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W351 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO END OF SECTION W
BRANCHPOINT

W351

There has been a lot of talk on the news lately about problems in the U.S. housing market. In some parts of the country home values have dropped, and some people are having problems making their mortgage payments.

How would you rate the housing market in your area? Would you say it is excellent, very good, good, fair or poor?

1. EXCELLENT	2. VERY GOOD	3. GOOD	4. FAIR	5. POOR	8. DK	9. RF
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W352

How would you rate the housing market in the United States as a whole? Would you say it is excellent, very good, good, fair or poor?

1. EXCELLENT	2. VERY GOOD	3. GOOD	4. FAIR	5. POOR	8. DK	9. RF
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W353 BRANCHPOINT: IF THIS A FINANCIAL R *and* {{HH HAS MORTGAGE
({H024 *or* H170)={1 *or* 2}}, CONTINUE ON TO W353

IF THIS A FINANCIAL R
and {NO LONGER LIVES IN A HOME THAT OWNED IN LAST IW
{{1ST HOME: (X079=1 *and* A071={5 *or* 8 *or* 9}}
or {2ND HOME: (X032=1 *and* A073={5 *or* 8 *or* 9}}}
or R IN NURSING HOME NO LONGER OWNS HOME
({X079=1 *or* X032}=1 *and* A070={5 *or* 8 *or* 9}}),
CONTINUE ON TO W353

IF THIS A FINANCIAL R
and R LIVES IN A HOME THAT OWNED IN LAST IW BUT DOES NOT
OWN NOW
{{1ST HOME: (X079=1 *and* A071=1 *and* {H004 NOT 1} *and* {H008
{NOT 1 *and* NOT 2}} *and* {H014 {NOT 1 *and* NOT 3}}}
or {2ND HOME: (X032=1 *and* A073=1 *and* {H151 NOT 1}})},
CONTINUE ON TO W353

OTHERWISE, GO TO W360

W353

Have you fallen more than 2 months behind on mortgage payments in the past 2 years?

1. YES	5. NO	8. DK	9. RF
GO TO W359 BRANCHPOINT			

W354

Have you gone through a foreclosure in the past 2 years?

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DEF: FORECLOSURE OF A HOUSE IS WHEN A BANK TAKES POSSESSION OF THE HOUSE BECAUSE THE OWNER DID NOT KEEP UP WITH THE MORTGAGE PAYMENTS

1. YES	5. NO	8. DK	9. RF
GO TO W356			

W355 BRANCHPOINT: IF R {NO LONGER LIVES IN A HOME THAT OWNED IN LAST IW
{{1ST HOME: (X079=1 and A071={5 or 8 or 9})}}
or {2ND HOME: (X032=1 and A073={5 or 8 or 9})}}
or R IN NURSING HOME NO LONGER OWNS HOME
({X079=1 or X032}=1 and A070={5 or 8 or 9})},
CONTINUE ON TO W355
OTHERWISE, GO TO W357

W355

Did you lose your home because of this?

1. YES	5. NO	8. DK	9. RF
GO TO W357			

W356

Are you facing possible foreclosure?

DEF: FORECLOSURE OF A HOUSE IS WHEN A BANK TAKES POSSESSION OF THE HOUSE BECAUSE THE OWNER DID NOT KEEP UP WITH THE MORTGAGE PAYMENTS

1. YES	5. NO	8. DK	9. RF
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W357

Has any family member helped you out by providing financial or other assistance?

1. YES	5. NO	8. DK	9. RF
GO TO W360			

W358

(Who helped?)

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD	3. PARENT	4. SIBLING	5. GRANDCHILD
7. OTHER	8. DK	9. RF	

W359 BRANCHPOINT: IF R DID NOT REPORT HAVING A MORTGAGE (({H024 and H170}={NOT 1 and NOT 2}) or HH FELL BEHIND ON MORTGAGE PAYMENTS (W353=1), GO TO W360

W359

How likely is it that you will fall behind in your mortgage payments during the next 6 months — is it very likely, somewhat likely, or not likely at all?

1. VERY LIKELY	3. SOMEWHAT LIKELY	
5. NOT LIKELY AT ALL	8. DK	9. RF

W360

Not counting you (or your [husband/wife/partner]), has anyone in your immediate family fallen more than 2 months behind on mortgage payments in the past 2 years?

1. YES	5. NO	8. DK	9. RF
GO TO W303			

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W361

(Who is that?)

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD	3. PARENT	4. SIBLING	5. GRANDCHILD
7. OTHER	8. DK	9. RF	

W362

Has anyone in your immediate family gone through a foreclosure in the past 2 years?

DEF: FORECLOSURE OF A HOUSE IS WHEN A BANK TAKES POSSESSION OF THE HOUSE BECAUSE THE OWNER DID NOT KEEP UP WITH THE MORTGAGE PAYMENTS

1. YES	5. NO	8. DK	9. RF
GO TO W365			

W363 BRANCHPOINT: IF {ONLY ONE TYPE OF FAMILY MEMBER FELL BEHIND ON PAYMENTS or R DID NOT SAY} (W361={1 SELECTION ONLY or DK or RF}), GO TO W364

W363

(Who is that?)

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD	3. PARENT	4. SIBLING	5. GRANDCHILD
7. OTHER	8. DK	9. RF	

W364

Did anyone lose their home because of this?

[IWER: CHOOSE "YES" IF AT LEAST ONE FAMILY MEMBER LOST THEIR HOME]

1. YES	5. NO	8. DK	9. RF
GO TO W366			

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W365

Is anyone facing possible foreclosure?

DEF: FORECLOSURE OF A HOUSE IS WHEN A BANK TAKES POSSESSION OF THE HOUSE BECAUSE THE OWNER DID NOT KEEP UP WITH THE MORTGAGE PAYMENTS

1. YES	5. NO	8. DK	9. RF
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W366

Have you helped anyone out by providing any financial or other assistance?

1. YES	5. NO	8. DK	9. RF
GO TO W303			

W367 BRANCHPOINT: IF {ONLY ONE TYPE OF FAMILY MEMBER FELL BEHIND ON PAYMENTS or R DID NOT SAY} (W361={1 SELECTION ONLY or DK or RF}), GO TO W303

W367

(Who did you help?)

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD	3. PARENT	4. SIBLING	5. GRANDCHILD
7. OTHER	8. DK	9. RF	

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
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W311

IWER: ENTER CURRENT MODE OF INTERVIEW:

1. TELEPHONE	2. FACE-TO-FACE
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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.

W314_W306 BRANCHPOINT: IF R's HOUSEHOLD IS NOT ASSIGNED ENHANCED FACE-TO-FACE THIS WAVE (X090 NOT 3), GO TO W307 (ASSIST) (AFTER W312)

IF R IS NOT ELIGIBLE TO BE ASKED FOR SOCIAL SECURITY NUMBER THIS WAVE (Z120=5), GO TO W307 (ASSIST) (AFTER W312)

IF THIS IS NOT A SELF INTERVIEW (A009 NOT 1), GO TO W314_W306 (PROXY-IW)

SELF INTERVIEW SCRIPT

W314_W306 (W306PT1) (SELF-IW)

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 the form.

[IWER: PRESS 1 TO CONTINUE]

1. CONTINUE

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W306 (W306PT2) (SELF-IW)

IF THIS IS A FACE-TO-FACE INTERVIEW (W311=2):
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 TELEPHONE INTERVIEW (W311=2):
I will be sending you a letter from the Social Security Administration describing the purpose of our research and supporting our research efforts.

IF THIS IS A REINTERVIEW R (Z076=1):
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

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W310 (SELF-IW)

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

IF THIS IS A FACE-TO-FACE INTERVIEW (W311=2):

[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.]

IF THIS IS A TELEPHONE INTERVIEW (W311=1):

[IWER: ENTER LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS per X081] ON BLUE FORM AND SEND R THE FORM, LETTER, AND THE PREPAID MAILER.]

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

(IF THIS IS A FACE-TO-FACE IW:) 1. R AGREES - SIGNED FORM OBTAINED BY INTERVIEWER	(IF THIS IS A TELEPHONE IW:) 2. R AGREES - FORM AND LETTER BEING MAILED TO R
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(IF THIS IS A FACE-TO-FACE IW:) 3. R AGREES - FORM (AND LETTER) LEFT WITH R	4. R REFUSED	5. R NOT ABLE TO CONSENT
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(IF THIS IS A FACE-TO-FACE IW:) 9. R UNDECIDED - FORM AND LETTER LEFT WITH R
(IF THIS IS A TELEPHONE IW:) 9. R UNDECIDED - FORM AND LETTER BEING MAILED TO R

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

W314_W306 (PROXY-IW) BRANCHPOINT: GO TO W309 BRANCHPOINT (AFTER W310 (PROXY-IW))

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LIVING PROXY SCRIPT

W314_W306 (W306PT1) (PROXY-IW)

IWER: IF THE PROXY FOR THIS R JUST DID HIS/HER OWN INTERVIEW, READ:

We are asking all our participants to complete a form authorizing us to obtain social security data on earnings and benefits, so we would also like to have *R's FIRST NAME* complete the form.

IWER: OTHERWISE:

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 all our participants to complete a form authorizing us to obtain social security data on earnings and benefits.

IWER: READ TO ALL PROXIES:

(Again,) we want to assure you and *R's FIRST NAME* that the Health and Retirement Study is committed to taking the utmost care to protect the confidentiality of any information given to us, including all of the information on the form.

[IWER: PRESS 1 TO CONTINUE]

1. CONTINUE

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W306 (W306PT2) (PROXY-IW)

IF THIS IS A FACE-TO-FACE INTERVIEW (W311=2):

[IWER: HAND BLUE FORM AND LETTER TO PROXY AND GIVE THEM TIME TO READ THE FORM IF NEEDED. THEN ANSWER ANY QUESTIONS.]

Please give this letter, form, and self-addressed stamped envelope to *R's FIRST NAME* for [him/her] to read and sign and return to us.

[IWER: IF R CAN SIGN NOW, YOU MAY TAKE THE SIGNED FORM.]

IF THIS IS A TELEPHONE INTERVIEW (W311=1):

I have a letter from the Social Security Administration describing the purpose of our research and supporting our research efforts.

I will be sending the letter, the form, and a self-addressed stamped envelope to *R's FIRST NAME* for [him/her] to read and sign and return to us in the envelope provided.

IF THIS IS A REINTERVIEW R (Z076 = 1):

R's FIRST NAME may have been asked to provide this consent to us in the past. We are asking now that [he/she] allow us to update our records in order to obtain additional data from the Social Security Administration.

[IWER: PRESS 1 TO CONTINUE]

1. CONTINUE

9. RF — PROXY REFUSED FOR R

GO TO W307 (ASSIST)
(AFTER W312)

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W310 (PROXY-IW)

[IWER: ENTER LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS per X081] ON BLUE FORM AND [GIVE PROXY (W311=2)/SEND R (W311=1)] THE FORM, LETTER, AND THE PREPAID MAILER.]

[IWER: USE BLUE FORM FOR R'S OWN SOCIAL SECURITY NUMBER.]

IF THIS IS A FACE-TO-FACE IW (W311=2):

[IWER: IF THE R IS AVAILABLE, USE CODES 1 OR 3; OTHERWISE USE PROXY CODES 5 - 8.]

(IF THIS IS A FACE-TO-FACE IW:)
1. IF R IS AVAILABLE:
RESPONDENT AGREES - SIGNED FORM
OBTAINED BY INTERVIEWER

(IF THIS IS A FACE-TO-FACE IW:)
3. IF R IS AVAILABLE:
RESPONDENT AGREES - FORM AND LETTER
LEFT WITH R

5. R NOT ABLE TO CONSENT

(IF THIS IS A FACE-TO-FACE IW:)
6. FORM AND LETTER
LEFT WITH PROXY TO GIVE TO R

(IF THIS IS A TELEPHONE IW:)
7. FORM AND LETTER BEING MAILED TO R

8. PROXY REFUSED FOR RESPONDENT

NOTE: NEITHER DK NOR RF ARE ALLOWABLE RESPONSES, EXCEPT INSOFAR AS CODE "8. PROXY REFUSED FOR RESPONDENT" INCORPORATES A REFUSAL.

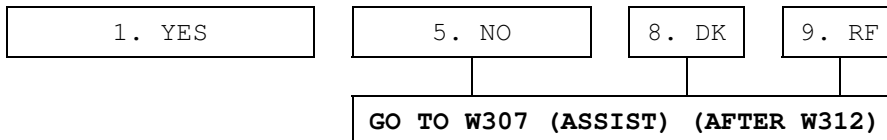
W309 BRANCHPOINT: IF THIS IS A LIVING PROXY INTERVIEW (A009={2 or 3}), GO TO W307 (ASSIST) (AFTER W312)

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?



W312

IF R IS WIDOWED (B063=5):

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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.

ASK EVERYONE:

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?

IF THIS IS A FACE-TO-FACE INTERVIEW (W311=2):

[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.]

IF THIS IS A TELEPHONE INTERVIEW (W311=1):

[IWER: ENTER LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS per X081] ON GREEN FORM AND SEND R THE FORM, LETTER, AND THE PREPAID MAILER.]

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

<p>(IF THIS IS A FACE-TO-FACE IW:)</p> <p>1. R AGREES - SIGNED FORM OBTAINED BY INTERVIEWER</p>	<p>(IF THIS IS A TELEPHONE IW:)</p> <p>2. R AGREES - FORM AND LETTER BEING MAILED TO R</p>	
<p>(IF THIS IS A FACE-TO-FACE IW:)</p> <p>3. R AGREES - FORM (AND LETTER) LEFT WITH R</p>	<p>4. R REFUSED</p>	<p>5. R NOT ABLE TO CONSENT</p>
<p>(IF THIS IS A FACE-TO-FACE IW:)</p> <p>9. R UNDECIDED - FORM AND LETTER LEFT WITH R</p> <p>(IF THIS IS A TELEPHONE IW:)</p> <p>9. R UNDECIDED - FORM AND LETTER BEING MAILED TO R</p>		

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

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W307. W ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN
SECTION W — 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

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