

HRS 2018 -- SECTION W: INTERNET USE & SOCIAL SECURITY PERMISSION  
FINAL VERSION -- 06/06/2018

\*\*\*\*\*

**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 TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.**

**FOR SECTION W - PURPLE TEXT INDICATES PROXY TEXT**

**THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK TEXT CAN ALSO APPLY TO  
THE WEB INTERVIEW WHEN THERE ARE NO DIFFERENCES FROM THE CORE.**

\*\*\*\*\*

**NOTE ABOUT NON-RESPONSE FLOW:**

ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN CAWI INTERVIEWS WILL  
FOLLOW THE SAME PATH AS A REFUSAL FOR THAT QUESTION, UNLESS OTHERWISE SPECIFIED.

\*\*\*\*\*

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

THIS IS A REINTERVIEW R (Z076=1)

THIS IS A REINTERVIEW HH (X024=1)

THIS IS NOT A REINTERVIEW HH (possibly a new cohort) (X024=5)

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)

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

R ELIGIBLE TO BE ASKED PERMISSION TO ACCESS VA RECORDS (Z269=1)

-----

\* 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.

\*\*\*\*\*

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

W303

Do you regularly use the Internet (or the World Wide Web), 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

W311

[INSTR: ENTER CURRENT MODE OF INTERVIEW:]

- 1. TELEPHONE
- 2. FACE-TO-FACE

*NOTE: A DIFFERENT ONE-HALF OF THE HRS SAMPLE IS DESIGNATED FOR AN ENHANCED FACE-TO-FACE INTERVIEW EACH WAVE, SO THAT OVER A TWO-WAVE PERIOD THE ENTIRE SAMPLE OF RESPONDENTS RECEIVES AN ENHANCED FACE-TO-FACE INTERVIEW.*

W314\_W306 BRANCHPOINT: IF THIS IS A NEW COHORT (X024 NOT 1), CONTINUE ON TO W314\_W306 (SELF-IW)

IF THIS IS A CAWI R, GO TO END OF SECTION W BRANCHPOINT

IF R's HOUSEHOLD IS NOT ASSIGNED ENHANCED FACE-TO-FACE THIS WAVE (X090 NOT 3), GO TO W307\_W\_ASSIST

IF R IS NOT ELIGIBLE TO BE ASKED FOR SOCIAL SECURITY NUMBER THIS WAVE (Z120=5), GO TO W307\_W\_ASSIST

W314\_W  
306

**READ TO ALL:**

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.

[INSTR: PRESS 1 TO CONTINUE]

**IF PRIOR WAVE REFUSER OR NEW R – 1st R**

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.

(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.

**IF PRIOR WAVE REFUSER OR NEW R – 2nd R**

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.

(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.

[INSTR: PRESS 1 TO CONTINUE]

1. CONTINUE

W306

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

Please take a minute to read the form(s).

[INSTR: HAND FORM TO R. GIVE R TIME TO READ THE FORM, 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=1):**

I will be sending you the form and also 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) AND R HAS REFUSED SSN IN PRIOR WAVE (Z120=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.

[INSTR: PRESS 1 TO CONTINUE]

**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.

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

**IF THIS IS A REINTERVIEW (Z076=1) R AND R HAS REFUSED SSN IN PRIOR WAVE (Z120=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.

**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(s), 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.

[INSTR: PRESS 1 TO CONTINUE]

1. CONTINUE

1. CONTINUE

9. RF - PROXY REFUSED FOR R ..... W307\_W\_ASSIST

W310

**IF W314 IS FULL THEN DISPLAY THIS INSTRUCTION:**

[INSTR: PLEASE PRESS THE END KEY NOW]

**[SHOW FOR ALL]**

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

[INSTR: USE THE SOCIAL SECURITY PERMISSION FORM FOR R'S SOCIAL SECURITY NUMBER.]

**IF W314 IS FULL THEN DISPLAY THIS INSTRUCTION:**

[INSTR: PLEASE PRESS THE END KEY NOW]

**[SHOW FOR ALL]**

For the study's research purposes, we would like R's FIRST NAME's authorization to obtain [his/her]history of earnings and benefits administered by the Social Security Administration.

**SHOW ALL TELEPHONE IWS (W311=1):**

[INSTR: EXPLAIN FORM AND ANSWER QUESTIONS AS NEEDED.]

**SHOW ALL F-T-F IWS (W311=2):**

[INSTR: EXPLAIN FORM AND ANSWER QUESTIONS AS NEEDED. IF THE R IS AVAILABLE, USE CODES 1 OR 3; OTHERWISE USE PROXY CODES 5 - 8.]

**SHOW FOR ALL:**

[INSTR: USE THE SOCIAL SECURITY PERMISSION FORM FOR R'S SOCIAL SECURITY NUMBER.

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

**(IF THIS IS A FACE-TO-FACE IW:)**

1. R AGREES - SIGNED FORM OBTAINED BY INTERVIEWER
3. R AGREES – FORM (AND LETTER) LEFT WITH R
4. R REFUSED ..... GO TO W307\_W\_ASSIST
5. R NOT ABLE TO CONSENT..... GO TO W307\_W\_ASSIST
9. R UNDECIDED – FORM AND LETTER LEFT WITH R

**(IF THIS IS A TELEPHONE IW :)**

2. R AGREES – FORM AND LETTER BEING MAILED TO R
4. R REFUSED ..... GO TO W307\_W\_ASSIST
5. R NOT ABLE TO CONSENT..... GO TO W307\_W\_ASSIST
9. R UNDECIDED – FORM AND LETTER BEING MAILED TO R

**(IF THIS IS A FACE-TO-FACE IW:)**

1. IF R IS AVAILABLE:  
RESPONDENT AGREES - SIGNED FORM OBTAINED BY INTERVIEWER
3. IF R IS AVAILABLE:  
RESPONDENT AGREES – FORM AND LETTER LEFT WITH R
5. R NOT ABLE TO CONSENT ..... GO TO THE W309 BRANCHPOINT
6. FORM AND LETTER LEFT WITH PROXY TO GIVE TO R
8. PROXY REFUSED FOR RESPONDENT .....GO TO W307\_W\_ASSIST

**(IF THIS IS A TELEPHONE IW:)**

5. R NOT ABLE TO CONSENT ..... GO TO THE W309 BRANCHPOINT
7. FORM AND LETTER BEING MAILED TO R
8. PROXY REFUSED FOR RESPONDENT .....GO TO W307\_W\_ASSIST

W322

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

[INSTR: SCAN THE LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS] FROM THE SOCIAL SECURITY PERMISSION FORM. GIVE R THE FORM AND THE PREPAID MAILER. EXPLAIN FORM AND ANSWER QUESTIONS AS NEEDED.]

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

[INSTR: SCAN THE LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS] FROM THE SOCIAL SECURITY PERMISSION FORM AND SEND R THE FORM, LETTER, AND THE PREPAID MAILER.]

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

[IWER: SCAN THE LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS] FROM THE SOCIAL SECURITY PERMISSION FORM. GIVE PROXY THE FORM AND THE PREPAID MAILER. EXPLAIN FORM AND ANSWER QUESTIONS AS NEEDED.]

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

[IWER: SCAN THE LOGGING ID [R's LOGGING ID NUMBER FOR MAILED DOCUMENTS] FROM THE SOCIAL SECURITY PERMISSION FORM AND SEND R THE FORM, LETTER, AND THE PREPAID MAILER.]

W307

[INSTR: 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)

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