UnderStandingAmericaStudy

UAS 401: HEALTH AND RETIREMENT STUDY SECTIONS S-T-W

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1 INTRODUCTION

This UAS panel survey, titled "UAS 401: Health and Retirement Study Sections S-T-W", administers the Health and Retirement Study sections T (Wills) and W (Internet Use). It focuses on widowhood and divorce, wills, trusts and life insurance policies, as well as includes some questions related to internet use. This survey is no longer in the field. Respondents were paid $3 to complete the survey.
The UAS HRS data collections are modeled on the University of Michigan's Health and Retirement Study. Questions were adapted to online use, and collected by CESR through the UAS. More information about the UAS HRS data collections is available online at https://uasdata.usc.edu/page/Health+And+Retirement. For information about HRS variables not covered in this codebook, please refer to the HRS documentation at http://hrsonline.isr.umich.edu/.

1.1 Topics

This survey contains questions (among others) on the following topics: Family, Health, Income, Wealth. A complete survey topic categorization for the UAS can be found here.

1.2 Experiments

This survey includes experiment(s) of the following type(s): Auxiliary Randomization. Please refer to explanatory comments in the Routing section for detailed information. A complete survey experiment categorization for the UAS can be found here.

1.3 Citation

Each publication, press release or other document that cites results from this survey must include an acknowledgment of UAS as the data source and a disclaimer such as, 'The project described in this paper relies on data from survey(s) administered by the Understanding America Study, which is maintained by the Center for Economic and Social Research (CESR) at the University of Southern California. The content of this paper is solely the responsibility of the authors and does not necessarily represent the official views of USC or UAS.' For any questions or more information about the UAS, contact Tania Gutsche, Project and Panel Manager, Center for Economic and Social Research, University of Southern California, at tgutsche@usc.edu.

2 SURVEY RESPONSE AND DATA

2.1 Sample selection and response rate

The sample selection for this survey was:

All active respondents who completed HRS Wave 4 N-P (UAS399).

As such, this survey was made available to 10456 UAS participants. Of those 10456 participants, 10304 completed the survey and are counted as respondents. Of those who are not counted as respondents, 11 started the survey without completing and 141 did not start the survey. The overall response rate was 98.55%.

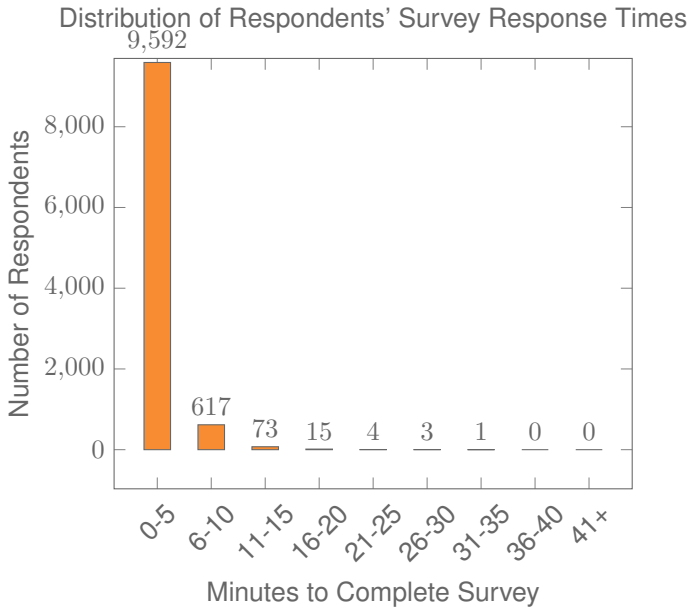
Note: We are unable to provide sample weights for a small number of UAS members (see the Sample and weighting section below for details). If they completed the survey, these members are included in the data set with a weight of zero, but accounted for in the computation of total sample size and survey response rate.%.

The detailed survey response rate is as follows:

UAS401 - Response Overview	
Size of selected sample	10456
Completed the survey	10304
Started but did not complete the survey	11
Did not start the survey	141
Response rate	98.55%

2.2 Timings

The survey took respondents an average of 3 minutes, and the full distribution of survey response times is available in the figure below. Times per question are available upon request.



2.3 Sample & Weighting

Sample weights for this survey are computed following the general UAS Weighting Procedure. Specifically, we use a two-step process where we first compute base weights, which correct for unequal probabilities of sampling UAS members, and then generate final, post-stratification weights, which align the sample to the reference population along certain socio-economic dimensions. These are gender (male/female), race and ethnicity (White/Black/Other/Hispanic/Native American), age (18-39/40-49/50/59/60+), education (High school or less/Some college/Bachelor or more), Census regions (Northeast/Midwest//West, excl. CA/CA, excl. LAC, LAC). Benchmark distributions for these variables are derived from the 6 most recent available Current Population Survey (CPS) Basic Monthly Survey with respect to the survey's completion date. The reference population considered for the weights is the U.S. population of adults age 18 and older.

This survey dataset may contain respondents with a weight of zero. These respondents belong to a small group of UAS members for whom sample weights cannot be computed due to non-probability recruitment for special projects. Hence, while they are accounted for in the total number of survey respondents, they do not contribute to any statistics using sample weights. More information is available from the UAS Weighting Procedure. Please contact UAS staff with any questions.

3 STANDARD VARIABLES

Each Understanding America Study data contains a series of standard variables, consisting of individual, household and sample identifiers, language indicator, time stamps and a rating by the respondent of how much he or she liked the survey:

- **uasid**: the identifier of the respondent. This identifier is assigned to a respondent at recruitment and stays with the respondent throughout each and every survey he/she participates in. When analyzing data from multiple surveys, the 'uasid' can be used to merge data sets.

- **uashhid**: the household identifier of the respondent. Every member is assigned a household identifier, stored in the variable 'uashhid'. For the primary respondent this identifier equals his or her 'uasid'. All other eligible members of the primary respondent's household (everyone who is 18 or older in the household) who become UAS respondents receive the 'uasid' of the primary respondent as their household identifier. The identifier 'uashhid' remains constant over time for all respondents. Thus it is always possible to find the original UAS household of an UAS panel member (even after they, for example, have moved out to form another household).

- **survhhid**: uniquely identifies the household a UAS panel member belongs to in a given survey. For instance, if the primary respondent and his/her spouse are both UAS members at the time of a given survey, they both receive the same 'survhhid' identifier for that survey. If they subsequently split, they receive two different 'survhhid' in subsequent surveys. They, however, always share the same 'uashhid'. The identifier 'survhhid' is set to missing (.) if no other household members are UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, household members have different 'survhhid' reflecting different household compositions at the time they answered the survey. For instance, suppose that the primary respondent and his/her spouse are both UAS members. If the primary respondent answers the survey when he/she is living with the spouse, but the spouse answers the survey when the couple has split, they receive different 'survhhid'. Hence, the variable 'survhhid' identifies household membership of UAS panel members, at the time the respondent answers the survey. Note: in the My Household survey 'survhhid' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.

- **uasmembers**: is the number of other household members who are also UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart is the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, the primary respondent of a household has a value of '0', whereas the second UAS household respondent has a value of '1'. Therefore 'uasmembers' should be interpreted as the

number of household and UAS panel members at the time the respondent answers the survey. Note: in the My Household survey 'uasmembers' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.

- **sampleframe**: indicates the sampling frame from which the household of the respondent was recruited. All UAS recruitment is done through address based sampling (ABS) in which samples are acquired based on postal records. Currently, the variable 'sampleframe' takes on four values reflecting four distinct sample frames used by the UAS over the year (in future data sets the number of sample frames used for recruitment may increase if additional specific populations are targeted in future recruitment batches):

  1. U.S. National Territory: recruited through ABS within the entire U.S.
  2. Areas high concentration Nat Ame: recruited through ABS in areas with a high concentration of Native Americans in the zip-code. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
  3. Los Angeles County: recruited through ABS within Los Angeles County.
  4. California: recruited through ABS within California.

  Note: prior to March 6, 2024 this variable was called sampletype and had the following value labels for the above list in UAS data sets:

  1. Nationally Representative Sample: recruited through ABS within the entire U.S.
  2. Native Americans: recruited through ABS in areas with a high concentration of Native Americans. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
  3. LA County: recruited through ABS within Los Angeles County.
  4. California: recruited through ABS within California.

- **batch**: indicates the batch from which the respondent was recruited. Currently, this variable takes the following values (in future data sets the number of batches may increase as new recruitment batches are added to the UAS):

  1. ASDE 2014/01
  2. ASDE 2014/01
  3. ASDE 2014/01
  4. Public records 2015/05
  5. MSG 2015/07
  6. MSG 2016/01
  7. MSG 2016/01
  8. MSG 2016/01
  9. MSG 2016/02

10. MSG 2016/03
11. MSG 2016/04
12. MSG 2016/05
13. MSG 2016/08
14. MSG 2017/03
15. MSG 2017/11
16. MSG 2018/02
17. MSG 2018/08
18. MSG 2019/04
19. MSG 2019/05
20. MSG 2019/11
21. MSG 2020/08
22. MSG 2020/10
23. MSG 2021/02
24. MSG 2021/08
25. MSG 2021/08
26. MSG 2022/02
27. MSG 2022/02
28. MSG 2022/08
29. MSG 2022/11
30. MSG 2022/11
31. MSG 2023/01
32. MSG 2023/06
33. MSG 2023/09
34. MSG 2023/10
35. MSG 2025/02

Note: prior to March 6, 2024 this variable had the following value labels for the above list in UAS data sets:

1. ASDE 2014/01 Nat.Rep.
2. ASDE 2014/01 Native Am.
3. ASDE 2014/11 Native Am.
4. LA County 2015/05 List Sample
5. MSG 2015/07 Nat.Rep.
6. MSG 2016/01 Nat.Rep. Batch 2

7. MSG 2016/01 Nat.Rep. Batch 3
8. MSG 2016/01 Nat.Rep. Batch 4
9. MSG 2016/02 Nat.Rep. Batch 5
10. MSG 2016/03 Nat.Rep. Batch 6
11. MSG 2016/04 Nat.Rep. Batch 7
12. MSG 2016/05 Nat.Rep. Batch 8
13. MSG 2016/08 LA County Batch 2
14. MSG 2017/03 LA County Batch 3
15. MSG 2017/11 California Batch 1
16. MSG 2018/02 California Batch 2
17. MSG 2018/08 Nat.Rep. Batch 9
18. MSG 2019/04 LA County Batch 4
19. MSG 2019/05 LA County Batch 5
20. MSG 2019/11 Nat. Rep. Batch 10
21. MSG 2020/08 Nat. Rep. Batch 11
22. MSG 2020/10 Nat. Rep. Batch 12
23. MSG 2021/02 Nat. Rep. Batch 13
24. MSG 2021/08 Nat. Rep. Batch 15
25. MSG 2021/08 Nat. Rep. Batch 16
26. MSG 2022/02 Nat. Rep. Batch 17 (priority)
27. MSG 2022/02 Nat. Rep. Batch 17 (regular)
28. MSG 2022/08 Nat. Rep. Batch 18
29. MSG 2022/11 LA County Batch 6
30. MSG 2022/11 Nat. Rep. Batch 20
31. MSG 2023/01 Nat. Rep. Batch 21
32. MSG 2023/06 Nat. Rep. Batch 22
33. MSG 2023-09 Native Am. Batch 3
34. MSG 2023-10 Nat. Rep. Batch 23

- **primary_respondent**: indicates if the respondent was the first person within the household (i.e. to become a member or whether s/he was added as a subsequent member. A household in this regard is broadly defined as anyone living together with the primary respondent. That is, a household comprises individuals who live together, e.g. as part of a family relationship (like a spouse/child/parent) or in context of some other relationship (like a roommate or tenant).

- **hardware**: indicates whether the respondent ever received hardware or not. Note: this variable should not be used to determine whether a respondent received hardware at a given point in time and/or whether s/he used the hardware to participate in a survey. Rather, it indicates whether hardware was ever provided:

    1. None
    2. Tablet (includes Internet)

- **language**: the language in which the survey was conducted. This variable takes a value of 1 for English and a value of 2 for Spanish.

- **start_date (start_year, start_month, start_day, start_hour, start_min, start_sec)**: indicates the time at which the respondent started the survey.

- **end_date (end_year, end_month, end_day, end_hour, end_min, end_sec)**: indicates the time at which the respondent completed the survey.

- **cs_001**: indicates how interesting the respondent found the survey.

4 BACKGROUND DEMOGRAPHICS

Every UAS survey data set includes demographic variables, which provide background information about the respondent and his/her household. Demographic information such as age, ethnicity, education, marital status, work status, state of residence, family structure is elicited every quarter through the ‘‘My Household’’ survey. The demographic variables provided with each survey are taken from the most recent ‘MyHousehold’ survey answered by the respondent. If at the time of a survey, the information in ‘‘My Household’’ is more than three months old, a respondent is required to check and update his or her information before being able to take the survey.

The following variables are available in each survey data set:

- **gender**: the gender of the respondent.
- **dateofbirth_year**: the year of birth of the respondent.
- **age**: the age of the respondent at the start of the survey.
- **agerange**: if the respondent’s age cannot be calculate due to missing information, ‘agerange’ indicates the approximate age. Should a value for both the ‘age’ and ‘agerange’ be present, then ‘age’ takes precedence over ‘agerange’.
- **citizenus**: indicates whether the respondent is a U.S. citizen.
- **bornus**: indicates whether the respondent was born in the U.S.
- **stateborn**: indicates the state in which the respondent was born. This is set to missing (.) if the respondent was not born in the U.S.
- **countryborn**: indicates the country in which the respondent was born. This is set to missing (.) if the respondent was born in the U.S.
- **countryborn_other**: indicates the country of birth if that country is not on the drop down list of countries shown to the respondent’.
- **statereside**: the state in which the respondent is living.
- **immigration_status**: indicates whether the respondent is an immigrant. It takes one of the following values: 0 Non-immigrant, 1 First generation immigrant (immigrant who migrated to the U.S), 2 Second generation immigrant (U.S.-born children of at least one foreign-born parent), 3 Third generation immigrant (U.S.-born children of at least one U.S.-born parent, where at least one grandparent is foreign-born), or 4 Unknown immigrant status.
- **maritalstatus**: the marital status of the respondent.
- **livewithpartner**: indicates whether the respondent lives with a partner.

- **education**: the highest level of education attained by the respondent.
- **hisplatino**: indicates whether the respondent identifies him or herself as being Hispanic or Latino. This variable is asked separately from race.
- **hisplatinogroup**: indicates which Hispanic or Latino group a respondent identifies him or herself with. This is set to missing (.) if the respondent does not identify him or herself as being Hispanic or Latino.
- **white**: indicates whether the respondent identifies him or herself as white (Caucasian).
- **black**: indicates whether the respondent identifies him or herself as black (African-American).
- **nativeamer**: indicates whether the respondent identifies him or herself as Native American (American Indian or Alaska Native).
- **asian**: indicates whether the respondent identifies him or herself as Asian (Asian-American).
- **pacific**: indicates whether the respondent identifies him or herself as Native Hawaiian or Other Pacific Islander.
- **race**: indicates the race of the respondent as singular (e.g., '1 White' or '2 Black') or as mixed (in case the respondent identifies with two or more races). The value '6 Mixed' that the respondent answered 'Yes' to at least two of the single race categories. This variable is generated based on the values of the different race variables (white, black, nativeamer, asian, pacific). This composite measure is not conditional on hisplatino, so an individual may identify as Hispanic or Latino, and also as a member of one or more racial groups.
- **working**: indicates whether the respondent is working for pay.
- **sick_leave**: indicates whether the respondent is not working because sick or on leave.
- **unemp_layoff**: indicates whether the respondent is unemployed or on lay off.
- **unemp_look**: indicates whether the respondent is unemployed and looking for a job.
- **retired**: indicates whether the respondent is retired.
- **disabled**: indicates whether the respondent has a disability.
- **lf_other**: specifies other labor force status.
- **laborstatus**: indicates the labor force status of the respondent as singular (e.g., '1 Working for pay' or '2 On sick or other leave') or as mixed (in case the respondent selects two or more labor statuses). The value '8 Mixed' indicates that the respondent answered 'Yes' to at least two of the single labor force status variables. This variable is generated based on the values of the different labor status variables (working, sick_leave, unempl_layoff, unempl_look, retired, disabled, lf_other).

- **employmenttype**: indicates the employment type of the respondent (employed by the government, by a private company, a nonprofit organization, or self-employed). This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.

- **workfullpart**: indicates whether the respondent works full or part-time. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.

- **hourswork**: indicates the number of hours the respondent works per week. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.

- **hhincome**: is the total combined income of all members of the respondent's household (living in their household) during the past 12 months.

- **anyhhmember**: indicates whether there were any members in the respondent's household at the time he/she answered the survey as reported by the respondent.

- **hhmembernumber**: indicates the number of household members in the respondent's household at the time of the survey as reported by the respondent. It may be that 'anyhhmember' is 'Yes', but 'hhmembernumber' is missing if the respondent did not provide the number of household members at the time of the survey.

- **hhmemberin_#**: indicates whether a household member is currently in the household as reported by the respondent. Household members are never removed from the stored household roster and their information is always included in survey data sets. The order of the roster is the same order in which household members were specified by the respondent in the 'MyHousehold' survey. The order is identified by the suffix _# (e.g., _1 indicates the first household member, _2 the second household member, etc.).

  As an example, if the first household member is in the household at the time of the survey, 'hhmemberin_1' is set to '1 HH Member 1 is in the HH'; if he/she has moved out, 'hhmemberin_1' is set to '0 HH member 1 is no longer in the HH'. Since information of other household members (stored in the variables listed below) is always included in survey data sets, information about 'hhmemberin_1' is available whether this person is still in the household or has moved out.

- **hhmembergen_#**: indicates the gender of another household member as reported by the respondent.

- **hhmemberage_#**: indicates the age of another household member. The age is derived from the month and year of birth of the household member as reported by the respondent.

- **hhmemberrel_#**: indicates the relationship of the respondent to the other household member as reported by the respondent.

- **hhmemberuasid_#**: is the 'uasid' of the other household member if this person is also a UAS panel member. It is set to missing (.) if this person is not a UAS panel member at the time of the survey. Since this identifier is directly reported by the respondent (chosen from a preloaded list), it may differ from the actual (correct) 'uasid' of the UAS member it refers to because of reporting error. Also, this variable should not be used to identify UAS members in a given household at the time of the survey. This is because the variables 'hhmemberuasid_#' are taken from the most recent 'My Household' and changes in household composition involving UAS members may have occurred between the time of the respondent answered 'My Household' and the time the respondent answers the survey. To follow UAS members of a given household, it is advised to use the identifiers 'uashhid' and 'survhhid'.

- **lastmyhh_date**: the date on which the demographics variables were collected through the 'My Household' survey.

5 MISSING DATA CONVENTIONS

Data files provide so-called clean data, that is, answers given to questions that are not applicable anymore at survey completion (for example because a respondent went back in the survey and skipped over a previously answered question) are treated as if the questions were never asked. In the data files all questions that were asked, but not answered by the respondent are marked with (.e). All questions never seen by the respondent (or any dirty data) are marked with (.a). The latter may mean that a respondent did not view the question because s/he skipped over it; or alternatively that s/he never reached that question due to a break off. If a respondent did not complete a survey, the variables representing survey end date and time are marked with (.c). Household member variables are marked with (.m) if the respondent has less household members (e.g. if the number of household members is 2, any variables for household member 3 and up are marked with (.m).

UAS provides data in STATA and CSV format. Stata data sets come with include variable labels that are not available in the CSV files. Value labels are provided for single-response answer option. In STATA these labels will include the labels 'Not asked' and 'Not answered' for (.a) and (.e), and will show in tabulations such as 'tab q1, missing'. For multiple-response questions a binary variable is created for each answer option indicating whether the option was selected or not. A summary variable is also provided in string format reflecting which options were selected and in which order. For example, if a question asked about favorite animals with options cat, dog, and horse, then if a respondent selected horse and then cat, the binary variables for horse and cat will be set to yes, while the overall variable would have a string value of '3-1'. If no answer was given, all binary variables and the summary variable will be marked with '.e'.

Questions that are asked multiple times are often implemented as so-called array questions. Supposing the name of such question was Q1 and it was asked in 6 different instances, your data set would contain the variables Q1_1_ to Q1_6_. To illustrate, if a survey asked the names of all children, then child_1_ would contain the name of the first child the respondent named and so on.

More information about the UAS data in general can be found on the UAS Data Pages web site.

6 ROUTING SYNTAX

The survey with routing presented in the next section includes all of the questions that make up this survey, the question answers when choices were provided, and the question routing. The routing includes descriptions of when questions are grouped, conditional logic that determines when questions are presented to the respondent, randomization of questions and answers, and fills of answers from one question to another.

If you are unfamiliar with conditional logic statements, they are typically formatted so that ***if*** the respondent fulfills some condition (e.g. they have a cellphone or a checking account), ***then*** they are presented with some other question or the value of some variable is changed. If the respondent does not fulfill the condition (e.g. they are not a cellphone adopter or they do not have a checking account), something ***else*** happens such as skipping the next question or changing the variable to some other value. Some of the logic involved in the randomization of questions or answers being presented to the respondent is quite complex, and in these instances there is documentation to clarify the process being represented by the routing.

Because logic syntax standards vary, here is a brief introduction to our syntax standards. The syntax used in the conditional statements is as follows: '=' is equal to, '$<$' is less than, '$>$' is greater than, and '!=' is used for does not equal. When a variable is set to some number N, the statement looks like 'variable := N'.

The formatting of the questions and routing are designed to make it easier to interpret what is occurring at any given point in the survey. Question ID is the bold text at the top of a question block, followed by the question text and the answer selections. When a question or variable has associated data, the name links to the appropriate data page, so you can easily get directly to the data. Text color is used to indicate the routing: red is conditional logic, gold is question grouping, green is looping, and orange is used to document randomization and other complex conditional logic processes. The routing is written for a computer to parse rather than a human to read, so when the routing diverges significantly from what is displayed to the respondent, a screenshot of what the respondent saw is included.

The name of the randomization variables are defined in proximity to where they are put into play, and like the question ID the names of the randomization variables can be used to link directly to the associated data page.

7 SURVEY WITH ROUTING

Start of section **Preload**

intro2 (Section Preload)
Welcome! Before we start we would first like to retrieve some information that you provided to us in another survey. This may take a few moments. Please just click 'Next' to continue and wait until the next screen appears.

previous_z076 := getHRSPreloadWave3(6,"z076")
FLCurrentYear := date("Y")
previous_endtime := getHRSPreloadWave3(6,"endtime")

IF previous_endtime = RESPONSE THEN
  z076 := YES
  Z092_temp := getBeginTime(6)
  PrevIWMonth := date('n',strtotime(Z092_temp))
  Fill code of question Z092 executed
  Z093 := date('Y',strtotime(Z092_temp))
  Z274 := getHRSPreloadWave3(6,"T245_")
  Z275_temp1 := getHRSPreloadWave3(6,"T246_")
  Z275_temp2 := getHRSPreloadWave3(6,"T250_")

  IF Z275_temp1 = 1 AND Z275_temp2 = 1 THEN
    Z275 := 3
  ELSEIF Z275_temp1 = 1 THEN
    Z275 := 1
  ELSEIF Z275_temp2 = 1 THEN
    Z275 := 2
  ELSE
    Z275 := 5
  END OF IF

  Z114 := getHRSPreloadWave3(2, "E046_NumGKids")
  preload_x065 := getHRSPreloadWave3(1,"X065ACouplenss", 2)
ELSE
  z076 := NO
END OF IF

A026_Rmarried := getHRSPreload(1, "A026_Rmarried")
A027_RPartnerd := getHRSPreload(1, "A027_RPartnerd")

A101_TotalKids := getHRSPreload(1, ”A101_TotalKids”)
A102_TotalNumInLaw := getHRSPreload(1, ”A102_TotalNumInLaw”)
X004AmoBorn(1) := getHRSPreload(1, ”X004AmoBorn(1)”)
X005AdaBorn(1) := getHRSPreload(1, ”X005AdaBorn(1)”)
X067AYrBorn(1) := getHRSPreload(1, ”X067AYrBorn(1)”)

IF X004AmoBorn(1) = RESPONSE AND X005AdaBorn(1) = RESPONSE AND X067AYrBorn(1) = RESPONSE THEN
  A014 := calcAge(X067AYrBorn(1), X004AmoBorn(1), X005AdaBorn(1));
  A019_RAge := A014
ELSE
  IF X067AYrBorn(1) = EMPTY THEN
    A019_RAge := empty
    A014 := empty
  ELSE
    A014 := FLCurrentYear - X067AYrBorn(1)
    A019_RAge := A014
  END OF IF
END OF IF

B058_D := getHRSPreload(1, ”B058_D”)
R2X060ASex := getHRSPReload(1, ”R2X060ASex”)
A023 := getHRSPreload(1,”A023”)
A202 := getHRSPreload(1,”A202”)
X065ACouplenss := getHRSpreload(1, ”X065ACouplenss”, 2)
Fill code of question FLHWP_past executed
FL_E057LIST := getHRSPReload(1,”FL_E057LIST”,2)
A166_A020TSameSpP_A := getHRSPReload(1,”A166_A020TSameSpP_A”)
E046_NumGKids := getHRSPReload(2,”E046_NumGKids”)
Fill code of question FLHWP executed
F001_MaAlive := getHRSPreload(2, ”F001_MAALIVE”)
F011_PaAlive := getHRSPreload(2, ”F011_PaAlive”)
x013 := getHRSPreload(2, ”x013”)
x015 := getHRSPreload(2, ”x015”)
F_num_brothers := getHRSPreload(2, ”F_num_brothers”)
F_num_sisters := getHRSPreload(2, ”F_num_sisters”)
Fill code of question FL_intro executed

IF z076 = YES THEN
  intro1 (Section Preload)
  (Thank you! In this survey we want to ask you some questions about any wills, trusts and life insurance policies you might have./Thank you! In this survey we want to ask you some questions about your late ^FLHWP_past and any wills, trusts and life insurance

policies you might have./Thank you! In this survey we want to ask you some questions about your former ^FLHWP_past and any wills, trusts and life insurance policies you might have./Thank you! In this survey we want to ask you some questions about your former ^FLHWP_past and any wills, trusts and life insurance policies you might have.)

Note:

Some of the questions in this survey will show you information that you entered in a survey you took up to two years ago. If you don't recognize that information or it doesn't make sense in some way, please click the 'Remark' button and leave a comment in the box that pops up.

If you don't know the answer to a question, please click the 'Next>>' button twice.

ELSE

intro1_2 (Section Preload)
(Thank you! In this survey we want to ask you some questions about any wills, trusts and life insurance policies you might have./Thank you! In this survey we want to ask you some questions about your late ^FLHWP_past and any wills, trusts and life insurance policies you might have./Thank you! In this survey we want to ask you some questions about your former ^FLHWP_past and any wills, trusts and life insurance policies you might have./Thank you! In this survey we want to ask you some questions about your former ^FLHWP_past and any wills, trusts and life insurance policies you might have.)

Note:

If you don't know the answer to a question, please click the 'Next>>' button twice. If you want to add clarifying information to your answer, please click the 'Remark' button and leave a comment in the box that pops up.

END OF IF

Start of section **Randomizers**

X501 := getHRSPreload(2, "X501")

IF Z087 = EMPTY THEN
Z087 := mt_rand(1,3)
END OF IF

End of section **Randomizers**

End of section **Preload**

Start of section **SectionS**

IF Z076 = 1 THEN

IF A166_A020TSameSpP_A = 5 OR B058_D = 1 OR B058_D = 2 THEN

Fill code of question FL_introS executed

introS (Section SectionS)
(First we would like to ask you some questions about your late ^FLHWP_past./First we would like to ask you some questions about your former ^FLHWP_past.)

Fill code of question FL_hisher executed
Fill code of question FLmstat_change executed
Fill code of question FLmstat_change2 executed

LOOP FROM 1 TO 4

Fill code of question FLS003 executed
Fill code of question FLS004 executed

S003 (INCOME CHANGE FROM MARITAL STATUS CHANGE in section SectionS)
(Financial situations often change with the death of a ^FLHWP_past.

Thinking back to the time surrounding your ^FLHWP_past's death, did any income from **Social Security** start, stop or change because of ^FL_hisher death?/Financial situations may change with divorce.

Thinking back to the time surrounding your divorce, did any income from **Social Security** start, stop or change because of it?/Financial situations may change with separation from a partner.

Thinking back to the time surrounding your separation, did any income from **Social Security** start, stop or change because of it?/Did any income from **Supplemental Security Income** start, stop or change because of ^FLmstat_change?/Did any income from **Veterans benefits** start, stop or change because of ^FLmstat_change?/Did any income from **other retirement pensions or annuities** start, stop or change because of ^FLmstat_change?)
1 Start
2 Stop
3 Change
5 No

IF S003(loopcounter) = 2 OR S003(loopcounter) = 3 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S004 (USUAL AMT BEFORE MARITAL STATUS CHANGE in section SectionS)
What was the usual amount of (income from **Social Security/Supplemental Security income/veterans benefits/other retirement pensions or annuities**) **before** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..99999996

S008 (USUAL AMOUNT BEFORE MARITAL STATUS CHANGE - PER in section SectionS)
Per:
2 Week
3 Every two weeks/Bi-weekly
4 Month
6 Year
7 Other (specify)

S009 (AMOUNT PER- -OTHER in section SectionS)
STRING

END OF GROUP

```
IF S004(loopcounter) = EMPTY THEN
    IF loopcounter = 1 THEN
        S005_Unf_Random(loopcounter) := 5
    ELSE
        S005_Unf_Random(loopcounter) := 11
    END OF IF
    IF loopcounter = 1 THEN
        IF S003(loopcounter) = 2 THEN
            bktamt1 := ”250”
            bktamt2 := ”500”
            bktamt3 := ”750”
            bktamt4 := ”1000”
        ELSEIF S003(loopcounter) = 3 THEN
```

```
        bktamt1 := ”100”
        bktamt2 := ”350”
        bktamt3 := ”650”
        bktamt4 := ”1000”

    END OF IF

ELSEIF loopcounter = 2 THEN

    IF S003(loopcounter) = 2 THEN

        bktamt1 := ”100”
        bktamt2 := ”300”
        bktamt3 := ”800”
        bktamt4 := ””

    ELSEIF S003(loopcounter) = 3 THEN

        bktamt1 := ”100”
        bktamt2 := ”300”
        bktamt3 := ”800”
        bktamt4 := ””

    END OF IF

ELSEIF loopcounter = 3 THEN

    IF S003(loopcounter) = 2 THEN

        bktamt1 := ”80”
        bktamt2 := ”200”
        bktamt3 := ”300”
        bktamt4 := ””

    ELSEIF S003(loopcounter) = 3 THEN

        bktamt1 := ”500”
        bktamt2 := ”1000”
        bktamt3 := ”1500”
        bktamt4 := ””

    END OF IF

ELSEIF loopcounter = 4 THEN
```

IF S003(loopcounter) = 2 THEN

bktamt1 := ”250”
bktamt2 := ”400”
bktamt3 := ”1000”
bktamt4 := ””

ELSEIF S003(loopcounter) = 3 THEN

bktamt1 := ”300”
bktamt2 := ”700”
bktamt3 := ”1000”
bktamt4 := ””

END OF IF

END OF IF

S005_Unf (Unfolding in section SectionS)
Thinking about the usual amount of (income from **Social Security/Supplemental Security income/veterans benefits/other retirement pensions or annuities**) **before** (your ^FLHWP_past's death/the divorce/the separation):

Per month, was it more, about, or less than...

S005_Unf_Results(loopcounter) := explodeUnfolding(S005_Unf(loopcounter))

IF S005_Unf_Results(loopcounter,1) = S005_Unf_Results(loopcounter,2) THEN

S005_Unf_Results(loopcounter,3) := S005_Unf_Results(loopcounter,1)

ELSE

S005_Unf_Results(loopcounter,3) := empty

END OF IF

END OF IF

END OF IF

IF S003(loopcounter) = 1 OR S003(loopcounter) = 3 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S010 (USUAL AMT AFTER MARITAL STATUS CHANGE in section SectionS)
What was the usual amount of (income from **Social Security/Supplemental Security income/veterans benefits/other retirement pensions or annuities**) **after** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..99999996

S014 (USUAL AMOUNT BEFORE MARITAL STATUS CHANGE - PER in section SectionS)
Per:
2 Week
3 Every two weeks/Bi-weekly
4 Month
6 Year
7 Other (specify)
95 Lump sum

S015 (USUAL AMT BEFORE MARITAL STATUS CHANGE- -OTHER in section SectionS)
STRING

END OF GROUP

IF S010(loopcounter) = EMPTY THEN

IF loopcounter = 1 OR (loopcounter = 2 AND S003(loopcounter) = 1) THEN

S011_Unf_Random(loopcounter) := 5

ELSE

S011_Unf_Random(loopcounter) := 11

END OF IF

IF loopcounter = 1 THEN

IF S003(loopcounter) = 1 THEN

bktamt1 := ”250”
bktamt2 := ”500”
bktamt3 := ”750”
bktamt4 := ”1000”

ELSEIF S003(loopcounter) = 3 THEN

```
        bktamt1 := ”100”
        bktamt2 := ”200”
        bktamt3 := ”500”
        bktamt4 := ”750”

    END OF IF

ELSEIF loopcounter = 2 THEN

    IF S003(loopcounter) = 1 THEN

        bktamt1 := ”150”
        bktamt2 := ”200”
        bktamt3 := ”300”
        bktamt4 := ”500”

    ELSEIF S003(loopcounter) = 3 THEN

        bktamt1 := ”100”
        bktamt2 := ”200”
        bktamt3 := ”600”
        bktamt4 := ””

    END OF IF

ELSEIF loopcounter = 3 THEN

    IF S003(loopcounter) = 1 THEN

        bktamt1 := ”300”
        bktamt2 := ”500”
        bktamt3 := ”700”
        bktamt4 := ””

    ELSEIF S003(loopcounter) = 3 THEN

        bktamt1 := ”200”
        bktamt2 := ”400”
        bktamt3 := ”700”
        bktamt4 := ””

    END OF IF

ELSEIF loopcounter = 4 THEN
```

IF S003(loopcounter) = 1 THEN

bktamt1 := ”150”
bktamt2 := ”300”
bktamt3 := ”750”
bktamt4 := ””

ELSEIF S003(loopcounter) = 3 THEN

bktamt1 := ”200”
bktamt2 := ”400”
bktamt3 := ”600”
bktamt4 := ””

END OF IF

END OF IF

S011_Unf (Unfolding in section SectionS)
Thinking about the usual amount of (income from **Social Security/Supplemental Security income/veterans benefits/other retirement pensions or annuities**) **after** (your ^FLHWP_past's death/the divorce/the separation):

Per month, was it more, about, or less than...

S011_Unf_Results(loopcounter) := explodeUnfolding(S011_Unf(loopcounter))

IF S011_Unf_Results(loopcounter,1) = S011_Unf_Results(loopcounter,2) THEN

S011_Unf_Results(loopcounter,3) := S011_Unf_Results(loopcounter,1)

ELSE

S011_Unf_Results(loopcounter,3) := empty

END OF IF

END OF IF

END OF IF

END OF LOOP

S016 (R'S HOURS/EARNINGS CHANGE AFTER MARITAL STATUS CHANGE in section SectionS)

Did your work hours, or earnings from your own work, start, stop, or change **after** (your ^FLHWP_past's death/the divorce/the separation)?
1 Start
2 Stop
3 Change
5 No

IF S016 = 2 OR S016 = 3 THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S017 (USUAL EARNINGS AMT BEFORE MARITAL STATUS CHANGE in section SectionS)
What was the usual amount of your earnings **before** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..99999996

S021 (USUAL AMOUNT OF EARNINGS BEFORE MARITAL STATUS CHANGE - PER in section SectionS)
Per:
2 Week
3 Every two weeks/Bi-weekly
4 Month
6 Year
7 Other (specify)

S022 (USUAL AMT OF EARNINGS BEFORE MARITAL STATUS CHANGE--OTHER in section SectionS)
STRING

END OF GROUP

IF S017 = EMPTY THEN
S018_Unf_Random := 11

S018_Unf (Unfolding in section SectionS)
Thinking about the usual amount of your earnings **before** (your ^FLHWP_past's death/the divorce/the separation):

Per month, was it more, about, or less than...

S018_Unf_Results := explodeUnfolding(S018_Unf)

IF S018_Unf_Results(1) = S018_Unf_Results(2) THEN
S018_Unf_Results(3) := S018_Unf_Results(1)

ELSE
S018_Unf_Results(3) := empty
END OF IF
END OF IF

S023 (HOURS PER WEEK BEFORE MARITAL STATUS CHANGE in section SectionS)
And how many hours per week did you usually work **before** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..120

IF S023 = EMPTY THEN
S024_Unf_Random := 1

S024_Unf (Unfolding in section SectionS)
Thinking about the usual amount of hours per week you worked **before** (your ^FLHWP_past's death/the divorce/the separation):

Per week, was it more, about, or less than...

S024_Unf_Results := explodeUnfolding(S024_Unf)

IF S024_Unf_Results(1) = S024_Unf_Results(2) THEN
S024_Unf_Results(3) := S024_Unf_Results(1)
ELSE
S024_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

IF S016 = 1 OR S016 = 3 THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S027 (USUAL EARNINGS AMT AFTER MARITAL STATUS CHANGE in section SectionS)
What was the usual amount of your work earnings **after** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..99999996

S031 (USUAL AMOUNT OF EARNINGS AFTER MARITAL STATUS CHANGE - PER in section SectionS)
Per:
2 Week

3 Every two weeks/Bi-weekly
4 Month
6 Year
7 Other (specify)

S032 (USUAL AMT OF EARNINGS AFTER MARITAL STATUS CHANGE PER--OTHER in section SectionS)
STRING

END OF GROUP

IF S027 = EMPTY THEN
S028_Unf_Random := 11

S028_Unf (Unfolding in section SectionS)
Thinking about the usual amount of your earnings **after** (your ^FLHWP_past's death/the divorce/the separation):

Per month, was it more, about, or less than...

S028_Unf_Results := explodeUnfolding(S028_Unf)

IF S028_Unf_Results(1) = S028_Unf_Results(2) THEN
S028_Unf_Results(3) := S028_Unf_Results(1)
ELSE
S028_Unf_Results(3) := empty
END OF IF
END OF IF

S033 (HOURS PER WEEK AFTER MARITAL STATUS CHANGE in section SectionS)
And how many hours per week did you usually work **after** (your ^FLHWP_past's death/the divorce/the separation)?
RANGE 0..120

IF S033 = EMPTY THEN
S034_Unf_Random := 1

S034_Unf (Unfolding in section SectionS)
Thinking about the number of hours per week you usually worked **after** (your ^FLHWP_past's death/the divorce/the separation):

Per week, was it more, about, or less than...

S034_Unf_Results := explodeUnfolding(S034_Unf)

IF S034_Unf_Results(1) = S034_Unf_Results(2) THEN
S034_Unf_Results(3) := S034_Unf_Results(1)
ELSE
S034_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

S037 (HEALTH INSURANCE CHANGE in section SectionS)
Did the type, cost, or coverage of your health insurance change as a result of (your ^FLHWP_past's death/the divorce/the separation)?

IF S037 = YES THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S038 (HEALTH INSURANCE CHANGES in section SectionS)
What changed about your health insurance?

Choose all that apply.
1 Cost became higher
2 Cost became lower
3 Fewer services covered
4 More services covered
5 Less choice of physicians
6 More choice of physicians
7 More convenient
8 Lost plan
97 Other (specify)

S039 (HEALTH INSURANCE CHANGE- -OTHER in section SectionS)
STRING

END OF GROUP
END OF IF

IF A202 = 1 OR B058_D = 2 THEN
S040 (RECEIVED LIFE INSURANCE SETTLEMENT in section SectionS)
Did you receive a life insurance settlement?

Please include any that you have already mentioned.

IF S040 = YES THEN

S041 (AMT FROM SPOUSE/PARTNER'S LIFE INSURANCE in section SectionS)
How much did the life insurance settlement amount to?

Please include only settlement related to (spouse/partner/spouse/partner)'s death.
RANGE 0..99999996

IF S041 = EMPTY THEN

S061_Unf_Random := 5

S061_Unf (Unfolding in section SectionS)
Thinking about the life insurance settlement you received:

Was it more, about, or less than...

S061_Unf_Results := explodeUnfolding(S061_Unf)

IF S061_Unf_Results(1) = S061_Unf_Results(2) THEN

S061_Unf_Results(3) := S061_Unf_Results(1)

ELSE

S061_Unf_Results(3) := empty

END OF IF

END OF IF

END OF IF

S042 (RECEIVED LUMP-SUM PENSION SETTLEMENT in section SectionS)
Did you receive a lump-sum pension settlement?

IF S042 = YES THEN

S043 (AMT FROM LUMP-SUM PENSION SETTLEMENT in section SectionS)
How much did the lump-sum pension settlement amount to?
RANGE 0..99999996

IF S043 = EMPTY THEN

S064_Unf_Random := 5

S064_Unf (Unfolding in section SectionS)
Thinking about the lump-sum pension settlement that you received:

Was it more, about, or less than...

S064_Unf_Results := explodeUnfolding(S064_Unf)

IF S064_Unf_Results(1) = S064_Unf_Results(2) THEN
S064_Unf_Results(3) := S064_Unf_Results(1)
ELSE
S064_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

S044 (FUNERAL EXPENSES in section SectionS)
Not counting what was covered by insurance or your (spouse/partner/spouse/partner)'s estate, what were the expenses associated with the death, that is, for funeral expenses, legal fees, etc.?
RANGE 0..99999996

IF S044 = EMPTY THEN
S045_Unf_Random := 5

S045_Unf (Unfolding in section SectionS)
Thinking about the expenses associated with the death that were not covered by insurance or (your ^FLHWP_past's death/the divorce/the separation) estate:

Was it more, about, or less than...

S045_Unf_Results := explodeUnfolding(S045_Unf)

IF S045_Unf_Results(1) = S045_Unf_Results(2) THEN
S045_Unf_Results(3) := S045_Unf_Results(1)
ELSE
S045_Unf_Results(3) := empty
END OF IF
END OF IF

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

S048 (ANYTHING TO FIND MONEY in section SectionS)
To pay the expenses associated with (his/her/his/her) death and any illness that led to (his/her/his/her) death, did you have to sell assets, withdraw money that normally would not be touched, get help from a relative, or from a church or other institution, or do anything else special to find money?

Choose all that apply.
1 Yes, sell assets

2 Yes, withdraw money
3 Yes, got help from a relative
4 Institution or charity
5 Did not do anything special
7 Yes, other (specify)

S049 (ANYTHING TO FIND MONEY- -OTHER in section SectionS)
STRING

END OF GROUP

IF 3 IN S048 THEN

S050 (WHO HELPED in section SectionS)
Was that a child or grandchild of yours or your (spouse/partner/spouse/partner), or was it some other relative who helped with final illness and death expenses?
1 Child/Child-in-law
2 Other relative
3 Someone else
6 Grandchild

IF S050 = 1 OR S050 = 6 THEN

Fill code of question FLS051 executed

S051 (WHICH CHILD HELPED in section SectionS)
(Which child is that?

Choose all that apply./Which child of yours or your ^FLHWP_past is the parent of that grandchild?)
3 (CHILD LIST(3))
4 (CHILD LIST(4))
5 (CHILD LIST(5))
6 (CHILD LIST(6))
7 (CHILD LIST(7))
8 (CHILD LIST(8))
9 (CHILD LIST(9))
10 (CHILD LIST(10))
11 (CHILD LIST(11))
12 (CHILD LIST(12))
13 (CHILD LIST(13))
14 (CHILD LIST(14))
15 (CHILD LIST(15))
16 (CHILD LIST(16))
17 (CHILD LIST(17))
18 (CHILD LIST(18))
19 (CHILD LIST(19))

20 (CHILD LIST(20))
21 (CHILD LIST(21))
22 (CHILD LIST(22))
23 (CHILD LIST(23))
24 (CHILD LIST(24))
25 (CHILD LIST(25))
26 (CHILD LIST(26))
27 (CHILD LIST(27))
28 (CHILD LIST(28))
29 (CHILD LIST(29))
30 (CHILD LIST(30))
31 (CHILD LIST(31))
32 (CHILD LIST(32))
33 (CHILD LIST(33))
34 (CHILD LIST(34))
35 (CHILD LIST(35))
36 (CHILD LIST(36))
37 (CHILD LIST(37))
38 (CHILD LIST(38))
39 (CHILD LIST(39))
40 (CHILD LIST(40))
41 (CHILD LIST(41))
42 (CHILD LIST(42))
43 (CHILD LIST(43))
44 (CHILD LIST(44))
45 (CHILD LIST(45))
46 (CHILD LIST(46))
47 (CHILD LIST(47))
48 (CHILD LIST(48))
49 (CHILD LIST(49))
50 (CHILD LIST(50))
51 (CHILD LIST(51))
52 (CHILD LIST(52))
92 Deceased child
93 All children

END OF IF

END OF IF

S052 (STATE PARTNER DIED in section SectionS)
In which state or country did your (spouse/partner/spouse/partner) die?

If your (spouse/partner/spouse/partner) died outside of the U.S., please select 'Other country' from the bottom of the list and enter the name of the country on the next screen.

IF S052 = 97 THEN

S053 (WHERE PARTNERED DIED-OTHER COUNTRY in section SectionS)
You selected Other Country. Please specify the country.
STRING

END OF IF

S054 (CAUSE OF DEATH in section SectionS)
What was the cause of (his/her/his/her) death?
STRING

END OF IF

IF A023 != 5 AND B058_D != 2 THEN

S055 (EXPECT LESS LIFE INSURANCE in section SectionS)
Because of (your (spouse/partner/spouse/partner)'s death/the divorce/the separation) do you expect to receive less in the way of life insurance benefits if your former (spouse/partner/spouse/partner) dies?

END OF IF

Fill code of question FLS056 executed

S056 (LOSE ANY PART OF PENSION CLAIM in section SectionS)
Did you lose any part of your claim on your (former/late) (spouse/partner/spouse/partner)'s pension?

IF S056 = YES AND A023 != 5 AND B058_D != 2 THEN

S057 (RECEIVE ANYTHING TO COMPENSATE PENSION CLAIM in section SectionS)
Did you receive any money or property from your former (spouse/partner/spouse/partner) to compensate for the loss of your claim on (his/her/his/her) pension?

END OF IF

IF A202 = 1 OR B058_D = 2 THEN

ELSE

S058 (DIVORCE/SEPARATION EXPENSES in section SectionS)
All in all, what were your expenses associated with (your ^FLHWP_past's death/the divorce/the separation), that is, legal fees and costs?
RANGE 0..99999996

IF S058 = EMPTY THEN

S067_Unf_Random := 5

S067_Unf (Unfolding in section SectionS)

Thinking about the total expenses associated with (your ^FLHWP_past's death/the divorce/the separation), that is, legal fees and costs:

Was it more, about, or less than...

S067_Unf_Results := explodeUnfolding(S067_Unf)

IF S067_Unf_Results(1) = S067_Unf_Results(2) THEN
S067_Unf_Results(3) := S067_Unf_Results(1)
ELSE
S067_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF

S059 (ASSIST SECTION S-WIDOWHOOD/DIVORCE in section SectionS)
How often did you receive assistance with the previous questions?
1 Never
2 A few times
3 Most or all of the time
END OF IF
END OF IF

End of section **SectionS**

Start of section **SectionT**

personcounter := getHRSPreload(1, "personcounter")

IF personcounter = EMPTY THEN
personcounter := 52
END OF IF

X061ARelateR := getHRSPreload(1, "X061ARelateR", 2)
X056AResStat := getHRSPreload(1, "X056AResStat", 2)
X065_childalive := getHRSPreload(1, "X065_childalive", 2)
X058AFName := getHRSPreload(1, "X058AFName", 2)

LOOP FROM 1 TO PERSONCOUNTER

IF X056AResStat(cnt) != 7 AND X061ARelateR(cnt) IN (3,4,6,7,9,30,90) AND X065_childalive(cnt) != NO THEN

FL_T050LIST(cnt) := trim(ucwords(strtolower(X058AFName(cnt))))

END OF IF

END OF LOOP

Fill code of question FLHWP executed

T001_ (DOES R HAVE VALID WILL in section SectionT)
Next we have some questions about wills, trusts, and life insurance.

Do you currently have a will that is written and witnessed?

Please do not include living wills. A living will is a type of health care advanced directive that we will ask about separately.
1 Yes, will only
2 Yes, both will and trust
3 No, trust only
5 No, neither will or trust

IF T001_ = 1 OR T001_ = 2 OR T001_ = 3 THEN
Fill code of question FLT002 executed
Fill code of question FLT002A executed

T002_ (DID R MAKE FAMILY PROVISIONS IN WILL in section SectionT)
Have you made provisions in your (will/will or trust/trust) for any family members(other than your ^FLHWP?/?)

IF T002_ = 1 THEN
IF A101_TotalKids > 0 THEN
T003_ (R WILL INCLUDE CHILDREN/STEPCHILDREN in section SectionT)
Does that include any of your children or step-children?

IF T003_ = 1 THEN
Fill code of question FLT050_4 executed

T050_T004MTemp (WHICH CHILD IS INCLUDED IN WILL in section SectionT)
Which child is that?

Please choose all that apply. If you only have one child, please select that child then "Next" to continue.
3 (CHILD LIST T050(3))
4 (CHILD LIST T050(4))
5 (CHILD LIST T050(5))

6 (CHILD LIST T050(6))
7 (CHILD LIST T050(7))
8 (CHILD LIST T050(8))
9 (CHILD LIST T050(9))
10 (CHILD LIST T050(10))
11 (CHILD LIST T050(11))
12 (CHILD LIST T050(12))
13 (CHILD LIST T050(13))
14 (CHILD LIST T050(14))
15 (CHILD LIST T050(15))
16 (CHILD LIST T050(16))
17 (CHILD LIST T050(17))
18 (CHILD LIST T050(18))
19 (CHILD LIST T050(19))
20 (CHILD LIST T050(20))
21 (CHILD LIST T050(21))
22 (CHILD LIST T050(22))
23 (CHILD LIST T050(23))
24 (CHILD LIST T050(24))
25 (CHILD LIST T050(25))
26 (CHILD LIST T050(26))
27 (CHILD LIST T050(27))
28 (CHILD LIST T050(28))
29 (CHILD LIST T050(29))
30 (CHILD LIST T050(30))
31 (CHILD LIST T050(31))
32 (CHILD LIST T050(32))
33 (CHILD LIST T050(33))
34 (CHILD LIST T050(34))
35 (CHILD LIST T050(35))
36 (CHILD LIST T050(36))
37 (CHILD LIST T050(37))
38 (CHILD LIST T050(38))
39 (CHILD LIST T050(39))
40 (CHILD LIST T050(40))
41 (CHILD LIST T050(41))
42 (CHILD LIST T050(42))
43 (CHILD LIST T050(43))
44 (CHILD LIST T050(44))
45 (CHILD LIST T050(45))
46 (CHILD LIST T050(46))
47 (CHILD LIST T050(47))
48 (CHILD LIST T050(48))
49 (CHILD LIST T050(49))
50 (CHILD LIST T050(50))

51 (CHILD LIST T050(51))
52 (CHILD LIST T050(52))
93 (All children equally)
96 (All children)

IF 93 IN T050_T004MTemp OR (cardinal(T050_T004MTemp) = 1 AND !(96 IN T050_T004MTemp) AND T050_T004MTemp = response) THEN

ELSEIF A101_totalkids = 1 AND 96 IN T050_T004MTemp THEN

ELSE

T005_ (WILL PROVIDE FOR ALL CHILDREN EQUALLY in section SectionT)
Does that document provide for all your children about equally?

END OF IF

END OF IF

END OF IF

IF (E046_NumGKids $>$ 0 AND E046_NumGKids $<$ 81) OR (Z114 $>$ 0 AND Z114 $<$ 81) THEN

T006_ (R WILL INCLUDE GRANDCHILDREN in section SectionT)
Does that document include any grandchildren directly?
1 Yes
2 Only through their parents
3 No

IF T006_ = 1 OR T006_ = 2 THEN

Fill code of question FLT052_3 executed

T051_T007MTemp (WILL INCLUDE WHICH GRANDCHILD in section SectionT)
Which of your children are the parents of those grandchildren? Please choose all that apply.
3 (CHILD LIST(3))
4 (CHILD LIST(4))
5 (CHILD LIST(5))
6 (CHILD LIST(6))
7 (CHILD LIST(7))
8 (CHILD LIST(8))
9 (CHILD LIST(9))
10 (CHILD LIST(10))
11 (CHILD LIST(11))
12 (CHILD LIST(12))
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37 (CHILD LIST(37))
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40 (CHILD LIST(40))
41 (CHILD LIST(41))
42 (CHILD LIST(42))
43 (CHILD LIST(43))
44 (CHILD LIST(44))
45 (CHILD LIST(45))
46 (CHILD LIST(46))
47 (CHILD LIST(47))
48 (CHILD LIST(48))
49 (CHILD LIST(49))
50 (CHILD LIST(50))
51 (CHILD LIST(51))
52 (CHILD LIST(52))
92 Unlisted child who is deceased
93 (All children)

END OF IF

END OF IF

END OF IF

T008_ (Will provide for charity in section SectionT)
Have you made provisions for any charities in your will or trust?

END OF IF

T011_ (R HAVE ANY LIFE INSURANCE in section SectionT)
Do you have any life insurance, including individual or group policies? Please do not include burial insurance.

IF T011_ = 1 THEN

T012_ (NUMBER OF DIFF LIFE INS POLICIES R HAS in section SectionT)
How many different life insurance policies do you have?

Please include individual policies, group policies, or paid-up policies.
1 One
2 Two
3 Three
4 Four
5 Five or more

Fill code of question FLT013 executed

T013_ (FACE VALUE OF R LIFE INS POLICIES in section SectionT)
(What is the total face value of this policy/Altogether, what is the total face value of these policies), that is, the amount of money the beneficiary would get if you were to die?
RANGE 0..99999996

IF T013_ = EMPTY THEN
  IF Z087 = 1 THEN
    T014_Unf_Random := 3
  ELSEIF Z087 = 2 THEN
    T014_Unf_Random := 5
  ELSE
    T014_Unf_Random := 6
  END OF IF

  T014_Unf (Unfolding in section SectionT)
  Thinking about the amount of money the beneficiary would get:

  Is it more, about, or less than...

  T014_Unf_Results := explodeUnfolding(T014_Unf)

  IF T014_Unf_Results(1) = T014_Unf_Results(2) THEN

T014_Unf_Results(3) := T014_Unf_Results(1)
ELSE
T014_Unf_Results(3) := empty
END OF IF
END OF IF

Fill code of question FLT017 executed
Fill code of question FLT017_2 executed
Fill code of question FLT052_1 executed
Fill code of question FLT052_2 executed
Fill code of question FLT052_3 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

T052_T017MTemp (WHO ARE BENEFICIARIES in section SectionT)
(Who are the beneficiaries of this policy?

/Who are the beneficiaries of these policies?

)(If any beneficiares are grandchildren, please select the parents of those children.

)Please choose all that apply.
3 (CHILD LIST(3))
4 (CHILD LIST(4))
5 (CHILD LIST(5))
6 (CHILD LIST(6))
7 (CHILD LIST(7))
8 (CHILD LIST(8))
9 (CHILD LIST(9))
10 (CHILD LIST(10))
11 (CHILD LIST(11))
12 (CHILD LIST(12))
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37 (CHILD LIST(37))
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39 (CHILD LIST(39))
40 (CHILD LIST(40))
41 (CHILD LIST(41))
42 (CHILD LIST(42))
43 (CHILD LIST(43))
44 (CHILD LIST(44))
45 (CHILD LIST(45))
46 (CHILD LIST(46))
47 (CHILD LIST(47))
48 (CHILD LIST(48))
49 (CHILD LIST(49))
50 (CHILD LIST(50))
51 (CHILD LIST(51))
52 (CHILD LIST(52))
91 (My spouse/My partner)
92 Unlisted child who is deceased
93 (All children)
94 (All grandchildren equally)
97 Other, please specify:

T045S (BENEF TO LAPSED POLICIES - SPECIFY in section SectionT)
STRING

END OF GROUP

Fill code of question FLT018 executed

T018_ (R HAVE WHOLE/STRAIGHT LIFE INS POLICIES in section SectionT)
(Is this a life insurance policy that builds/Are any of these life insurance policies ones that build) up a cash value that you can borrow against, or that you would receive if the policy

were to be cancelled?

(DEF: ”Policies that build up a cash value” are sometimes called ’whole life’ or ’straight life policies.’)

IF T018_ = 1 THEN
IF T012_ != 1 THEN
T019_ (HOW MANY WHOLE/STRAIGHT LIFE INS POLICY in section SectionT)
How many such policies do you have?
1 One
2 Two
3 Three
4 Four
5 Five or more

Fill code of question FLT020 executed

T020_ (CURR FACE VALUE OF WHOLE LIFE INS POLICY in section SectionT)
What is the current face value of (this policy/these policies)?
RANGE 0..99999996

IF T020_ = EMPTY THEN
IF Z087 = 1 THEN
T021_Unf_Random := 3
ELSEIF Z087 = 2 THEN
T021_Unf_Random := 5
ELSE
T021_Unf_Random := 6
END OF IF

T021_Unf (Unfolding in section SectionT)
Thinking about the value of (this policy/these policies):

Is it more, about, or less than...

T021_Unf_Results := explodeUnfolding(T021_Unf)

IF T021_Unf_Results(1) = T021_Unf_Results(2) THEN
T021_Unf_Results(3) := T021_Unf_Results(1)
ELSE
T021_Unf_Results(3) := empty
END OF IF

END OF IF
ELSEIF T012_ = 1 THEN
T019_ := 1
END OF IF

Fill code of question FLT024 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

T024_ (TOTAL AMT R PAY FOR LIFE INS POLICIES in section SectionT)
(Altogether, about how much do you pay for this policy/Altogether, about how much do you pay for these policies) each month or year?

Please enter zero if the policy is paid up or there are no premium payments.
RANGE 0..99999996

T025_ (TOTAL AMT R PAY FOR LIFE INS POLIC - PER in section SectionT)
Per:
1 Month
2 Year

END OF GROUP

IF T024_ = EMPTY THEN
Fill code of question FLT026 executed

IF X501 = 1 THEN
T026_Unf_Random := 7
ELSE
T026_Unf_Random := 9
END OF IF

T026_Unf (Unfolding in section SectionT)
Thinking about how much you pay for (this policy/these policies):

Per month, is it more, about, or less than...

T026_Unf_Results := explodeUnfolding(T026_Unf)

IF T026_Unf_Results(1) = T026_Unf_Results(2) THEN
T026_Unf_Results(3) := T026_Unf_Results(1)
ELSE
T026_Unf_Results(3) := empty

END OF IF
END OF IF

IF T012_ != 1 THEN
Fill code of question FLT029 executed
Fill code of question FLT052_1 executed
Fill code of question FLT052_2 executed
Fill code of question FLT052_3 executed
Fill code of question FLT053_5 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

T053_T029MTemp (WHO ARE BENEFICIARIES OF THESE INS in section SectionT)
(Who are the beneficiaries of this policy?/Who are the beneficiaries of these policies?)

Please choose all that apply.
3 (CHILD LIST(3))
4 (CHILD LIST(4))
5 (CHILD LIST(5))
6 (CHILD LIST(6))
7 (CHILD LIST(7))
8 (CHILD LIST(8))
9 (CHILD LIST(9))
10 (CHILD LIST(10))
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45 (CHILD LIST(45))
46 (CHILD LIST(46))
47 (CHILD LIST(47))
48 (CHILD LIST(48))
49 (CHILD LIST(49))
50 (CHILD LIST(50))
51 (CHILD LIST(51))
52 (CHILD LIST(52))
91 (My spouse/My partner)
92 Unlisted child who is deceased
93 (All children)
94 (All grandchildren)
97 Other, please specify:

T030S (WHO ARE BENEF OF THESE INS - SPECIFY in section SectionT)
STRING

END OF GROUP
END OF IF
END OF IF

Fill code of question FLT031 executed

T031_ (OBTAIN NEW LIFE INSURANCE in section SectionT)
(Since ^Z092, ^Z093,/In the last two years,) have you obtained any new life insurance policies?

IF T031_ = 1 THEN

T032_ (FACE VALUE NEW LIFE INSURANCE in section SectionT)
What is the total face value of this policy/all of these policies?
RANGE 0..99999996

IF T032_ = EMPTY THEN
T033_Unf_Random := 5

T033_Unf (Unfolding in section SectionT)
Thinking about the face value of this policy/these policies:

Is it more, about, or less than...

T033_Unf_Results := explodeUnfolding(T033_Unf)

IF T033_Unf_Results(1) = T033_Unf_Results(2) THEN
T033_Unf_Results(3) := T033_Unf_Results(1)
ELSE
T033_Unf_Results(3) := empty
END OF IF
END OF IF
END OF IF
END OF IF

Fill code of question FLT031 executed

T036_ (R LIFE INS POLICY LAPSE SINCE LAST WAVE in section SectionT)
(Since ^Z092, ^Z093,/In the last two years,) have you allowed any life insurance policies to lapse or have any been cancelled?

IF T036_ = 1 THEN
T037_ (FACE VAL LAPSED LIFE INS P0LICY in section SectionT)
What was the total face value of this policy/these policies?
RANGE 0..99999996

IF T037_ = EMPTY THEN
T038_Unf_Random := 6

T038_Unf (Unfolding in section SectionT)
Thinking about the total face value of the lapsed policy/policies:

Is it more, about, or less than...

T038_Unf_Results := explodeUnfolding(T038_Unf)

IF T038_Unf_Results(1) = T038_Unf_Results(2) THEN
T038_Unf_Results(3) := T038_Unf_Results(1)
ELSE
T038_Unf_Results(3) := empty
END OF IF
END OF IF

T041_ (WHO LET LIFE INS POLICY LAPSE in section SectionT)
Was this lapse or cancellation something you chose to do, or was it done by the provider, your employer, or someone else?
1 My choice
2 Provider or employer or someone else chose

IF T041_ != 2 THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

T042_ (WHY LET LIFE INS POLICY LAPSE in section SectionT)
Was it because the policy was too expensive, because you did not need the coverage, or some other reason?
1 Too expensive
2 Coverage not needed
3 I got a new policy
4 I took the cash out
7 Other, please specify:

T048S (WHY LET LIFE INS POLICY LAPSE- SPECIFY in section SectionT)
STRING

END OF GROUP

T043_ (R RECD CASH AFTER POLICY CANCEL OR LAPSE in section SectionT)
Did you receive any cash when the policy was cancelled or allowed to lapse?

IF T043_ = 1 THEN
T044_ (AMT RECD AFTER R POLICY CANCEL OR LAPSE in section SectionT)
About how much cash did you receive?
RANGE 0..99999996

IF A019_RAge > 64 THEN
T252_ (INTRO TO MEDICAL CARE/TREATMENT ARRANGEMENTS in section SectionT)
Now we would like to ask you some questions about healthcare decisions that

might need to be made for you in the future, if you are unable to make them yourself.

Please select ”Next” to continue.

ELSE

Fill code of question FL_T255_option executed

IF F001_MaAlive = 1 OR (x013 = 1 AND F001_MaAlive = empty) THEN

Fill code of question FL_T255 executed

T255_ (mother made legal arrangements in section SectionT)
(Has your mother made any legal arrangements for a specific person or persons to make decisions about her care or medical treatment if she cannot make those decisions herself? This is sometimes called a ”Durable Power of Attorney for Health Care”./Does your mother have a Durable Power of Attorney for Health Care?)

IF T255_ = 1 THEN

T256_ (mother which specific persons legal arrangements in section SectionT)
Who is that - - what is that person’s relationship to your mother? Please select all that apply.
1 My mother’s spouse or partner
2 Me
3 (My sibling/One or more of my siblings)
4 Another person

END OF IF

END OF IF

IF F011_PaAlive = 1 OR (x015 = 1 AND F011_PaAlive = empty) THEN

Fill code of question FL_T257 executed

T257_ (father made legal arrangements in section SectionT)
(Has your father made any legal arrangements for a specific person or persons to make decisions about his care or medical treatment if he cannot make those decisions himself? This is sometimes called a ”Durable Power of Attorney for Health Care”./Does your father have a Durable Power of Attorney for Health Care?)

IF T257_ = 1 THEN

T258_ (father which specific persons legal arrangements in section SectionT)
Who is that - - what is that person’s relationship to your father? Please select all that apply.
1 My father’s spouse or partner
2 Me
3 (My sibling/One or more of my siblings)

4 Another person
END OF IF
END OF IF

T047_AssistT (ASSIST SECTION T - WILLS AND TRUSTS in section SectionT)
How often did you receive assistance with these previous questions about any will(s), trust(s) and life insurance(s) you might have?
1 Never
2 A few times
3 Most or all of the time
END OF IF
END OF IF
END OF IF
END OF IF

IF T043_ = 1 AND A019_RAge < 65 THEN

ELSE
IF T043_ != 1 AND A019_RAge > 64 THEN
T252_ (INTRO TO MEDICAL CARE/TREATMENT ARRANGEMENTS in section SectionT)
Now we would like to ask you some questions about healthcare decisions that might need to be made for you in the future, if you are unable to make them yourself.

Please select "Next" to continue.
END OF IF

IF A019_Rage > 64 THEN
IF Z274 = 1 THEN

ELSE
T245_ (EVER DISCUSSED MEDICAL CARE WITH ANYONE in section SectionT)
People sometimes make plans about the type of care or medical treatment they would want or not want, if they were to become seriously ill.

Have you ever discussed with anyone the care or medical treatment you would want to receive if you were to become seriously ill in the future?
END OF IF

Fill code of question FLT246 executed
Fill code of question FLT246A executed

T246_ (ASSIGN DURABLE POWER OF ATTORNEY in section SectionT)
(In ^Z092, ^Z093 you indicated that you have a legal arrangement for a specific person or persons to make decisions about your care or medical treatment if you cannot make those decisions yourself. This is sometimes called a "Durable Power of Attorney for Health Care."

Do you still have that arrangement in place? /Have you made any legal arrangements for a specific person or persons to make decisions about your care or medical treatment if you cannot make those decisions yourself? This is sometimes called a "Durable Power of Attorney for Health Care.")
1 (Yes, I still have this same arrangement)
2 (Yes, but this arrangement has changed)
3 (Yes, I do have this arrangement now but did not have it last time)
4 (No, I do not have such an arrangement now and did not have it last time)
5 (No, I do not have it anymore)

IF T246_ = 1 OR T246_ = 2 OR T246_ = 3 THEN
Fill code of question FLT247_1 executed
Fill code of question FLT247_2 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

T247M (WHO HAS DURABLE POWER OF ATTORNEY in section SectionT)
Who has that authority, that is, what is their relationship to you? Please choose all that apply.
3 (My ^FLHWP)
4 (Child/Child-in-law/Grandchild)
5 Other relative
6 Friend
7 Physician or healthcare professional
8 Minister, rabbi, priest, or religious advisor
9 Attorney
10 Social worker
97 Other, please specify:

T249S (DURABLE POWER - OTHER SPECIFY in section SectionT)
STRING

END OF GROUP

IF 4 IN T247M THEN
Fill code of question FLT052_3 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

Fill code of question FLT248 executed

T066_T248MTemp (DURABLE POWER - WHICH CHILD in section SectionT)
Which child is that? Please choose all that apply.(

Please note: if it was a grandchild, please just select the parent of that grandchild.)

3 (CHILD LIST(3))
4 (CHILD LIST(4))
5 (CHILD LIST(5))
6 (CHILD LIST(6))
7 (CHILD LIST(7))
8 (CHILD LIST(8))
9 (CHILD LIST(9))
10 (CHILD LIST(10))
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45 (CHILD LIST(45))
46 (CHILD LIST(46))
47 (CHILD LIST(47))
48 (CHILD LIST(48))
49 (CHILD LIST(49))
50 (CHILD LIST(50))
51 (CHILD LIST(51))
52 (CHILD LIST(52))
92 Unlisted child who is deceased
93 (All children)
97 Other, please specify:

T248S (DURABLE POWER - WHICH CHILD - OTHER SPECIFY in section SectionT)
STRING

END OF GROUP
END OF IF
END OF IF

Fill code of question FLT250 executed
Fill code of question FLT250A executed

T250_ (R HAS WRITTEN LIVING WILL in section SectionT)
(In ^Z092, ^Z093, you indicated that you have written instructions about the care or medical treatment that you want to receive if you cannot make those decisions yourself. This is sometimes called a "Living Will" or "Physicians Orders for Life Sustaining Treatment."

Do you still have this arrangement in place?/Have you provided written instructions about the care or medical treatment that you want to receive if you cannot make those decisions yourself? This is sometimes called a "Living Will" or "Physician Orders for Life Sustaining Treatment.")

(DEF: "Physician Orders for Life Sustaining Treatment" are sometimes called POLST. Another name for the same arrangement is MOLST, which stands for "Medical Orders for Life Sustaining Treatment.")
1 (Yes, I still have this same arrangement)
2 (Yes, but this arrangement has changed)
3 (Yes, I do have this arrangement now but did not have it last time)

4 (No, I do not have such an arrangement now and did not have it last time)
5 (No, I do not have it anymore)

IF T250_ = 1 OR T250_ = 2 OR T250_ = 3 THEN

T251_ (LIVING WILL CONTAIN LIMITING CARE in section SectionT)
Do these instructions express a desire to limit the care or medical treatment that you receive in certain situations?

END OF IF

END OF IF

Fill code of question FL_T255_option executed

IF F001_MaAlive = 1 OR (x013 = 1 AND F001_MaAlive = empty) THEN

Fill code of question FL_T255 executed

T255_ (mother made legal arrangements in section SectionT)
(Has your mother made any legal arrangements for a specific person or persons to make decisions about her care or medical treatment if she cannot make those decisions herself? This is sometimes called a "Durable Power of Attorney for Health Care"./Does your mother have a Durable Power of Attorney for Health Care?)

IF T255_ = 1 THEN

T256_ (mother which specific persons legal arrangements in section SectionT)
Who is that - - what is that person's relationship to your mother? Please select all that apply.
1 My mother's spouse or partner
2 Me
3 (My sibling/One or more of my siblings)
4 Another person

END OF IF

END OF IF

IF F011_PaAlive = 1 OR (x015 = 1 AND F011_PaAlive = empty) THEN

Fill code of question FL_T257 executed

T257_ (father made legal arrangements in section SectionT)
(Has your father made any legal arrangements for a specific person or persons to make decisions about his care or medical treatment if he cannot make those decisions himself? This is sometimes called a "Durable Power of Attorney for Health Care"./Does your father have a Durable Power of Attorney for Health Care?)

IF T257_ = 1 THEN

T258_ (father which specific persons legal arrangements in section SectionT)
Who is that - - what is that person's relationship to your father? Please select all that apply.
1 My father's spouse or partner
2 Me
3 (My sibling/One or more of my siblings)
4 Another person

END OF IF

END OF IF

T047_AssistT (ASSIST SECTION T - WILLS AND TRUSTS in section SectionT)
How often did you receive assistance with these previous questions about any will(s), trust(s) and life insurance(s) you might have?
1 Never
2 A few times
3 Most or all of the time

END OF IF

End of section **SectionT**

Start of section **SectionW**

W303 (regularly use internet in section SectionW)
Do you regularly use the Internet (or the World Wide Web), for sendingand receiving e-mail or for any other purpose, such as makingpurchases, searching for information, or making travel reservations?

End of section **SectionW**

Start of section **Closing**

CS_001 (HOW PLEASANT INTERVIEW in section Closing)
Could you tell us how interesting or uninteresting you found the questions in this interview?
1 Very interesting
2 Interesting
3 Neither interesting nor uninteresting
4 Uninteresting
5 Very uninteresting

CS_003 (comments in section Closing)
Do you have any other comments on the interview? Please type these in the box below.(If you have no comments, please click next to complete this survey.)
STRING

End of section **Closing**

/* Please note that although question CS_003 is listed in the routing, the answers are not included in the microdata in the event identifiable information is captured. Cleaned responses are available by request. */