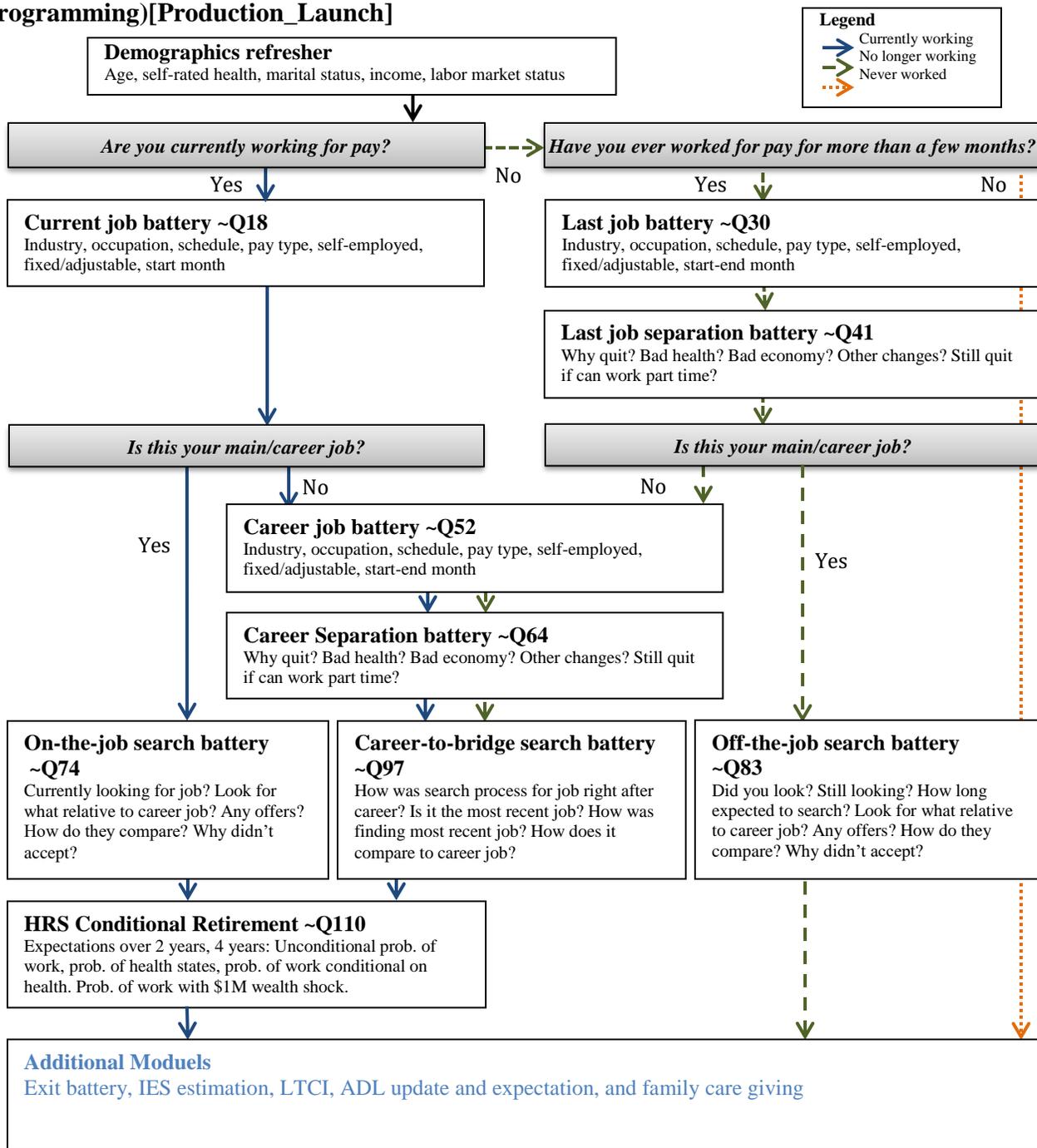


VRI Survey 6: Schematic (February 14, 2018 – Version to Programming)[Production_Launch]



VANGUARD RESEARCH INITIATIVE -- SURVEY 6

Overall notes:

- Use white background in survey program, with Vanguard logo in top right



- Custom Bookmark/Progress Bar. 'Usual progress bar should Not be used'
- [IMODERATE CHAT INSERTION DURING SOFT LAUNCH ONLY (REMOVED FOR FULL LAUNCH)]

[Remark: New or revised questions relative to Survey 4 (2015) are in BLUE. Deletions relative to Survey 4 are ~~strikeout~~]

Paradata TO BE CAPTURED

- TIME STAMPS – As long as each survey question is displayed as the only question on a screen, we will capture the amount of time a respondent stayed on each screen to allow us to see the amount of time spent on every survey question.
 - Captured in the data would be the time when they went onto the screen/question, and then again the time when they clicked 'next' to continue on to the next screen/question.
 - The data will be provided including each of those two time stamps so you can calculate the difference on the backend
 - If a respondent quits out of the survey, but then comes back to continue later – capture the log off time and restart time stamps.

[PROG: RECORD TIME STAMP FOR ENTRY AND TIME STAMP FOR EXIT OF EVERY SCREEN, ASSOCIATING TIME STAMP CLEARLY WITH THE QUESTION THAT THE RESPONDENT IS ON.

[PROG: RECORD THE LOG-OFF 'QUIT TIME' IF RESPONDENT STOPS THE SURVEY. RECORD THE RESTART TIME IF RESPONDENT COMES BACK IN TO COMPLETE THE SURVEY.

- For the situations where the respondent selects that they need to go back and update a survey response to make a correction, we will provide:
 - Time stamps and original answers on the original questions before the respondent went back.
 - A marker indicating that the respondent went back to make a correction.

- The final time stamp and revised answer (no overwritten time stamp or data).
 - The expectation is that in most cases there will only be one correction. In the case that a respondent goes back to make a correction more than once, only their final correction will be recorded (the intermediate corrections would be overwritten). Therefore, only one second set of questions will be built for every question to hold the 'new' vs. 'old' answers. This is feasible, but is a significant undertaking in terms of timing and programming size/complexity. Programming will confirm the additional timeline for this effort and we'll be back to you on this shortly.

[PROG: RECORD TIME STAMP ENTRY AND TIME STAMP EXIT ON ALL SURVEY QUESTIONS, INCLUDING THE SECOND STORED 'CORRECTION' QUESTIONS. IF RESPONDENT REPEATS THE 'CORRECTION' QUESTIONS MULTIPLE TIMES, STORE JUST THE FINAL ENTRY/EXIT TIMES.]

[PROG: CREATE MARKER IF RESPONDENT GOES BACK TO MAKE A CORRECTION, PER THE LOGIC EARLIER IN THE SURVEY AT THESE SECTIONS.]

Please keep the first and last response to all questions. Thus, the first response is stored as paradata, and the final response is overwritten as the answers change. The exception to this is the XXXX question sequence, where the question storage is defined separately.

Throughout the survey, unless a question indicates the programming instruction that ‘answer is mandatory’, all questions are to be considered non-mandatory. As a preview, mandatory response questions include

- [Q1, Q1a, Q2, Q2a, Q3, Q4, Q4a, Q6, Q16, Q17, Q17a, Q17b, Q17c, Q17d, Q18, Q20, Q22, Q23, Q29, Q30, Q32, Q33, Q34, Q40, Q51, Q52, Q54, Q59, Q60, Q61, Q63a, Q63b, Q111, Q130, Q224_1, Q224_2, Q224_3]
- Q24a, Q24b, Q25, Q26, Q28, Q35a, Q35b, Q36, Q37, Q39, Q55a, Q55b, Q56, Q57, Q62, Q63

Throughout survey, UNLESS OTHERWISE INDICATED, if a respondent fails to answer, display. “Your response is very valuable to us. Please attempt to provide an answer.” If the respondent then clicks next a second time, allow the respondent to skip the question.

Please display both “Previous” and “Next” options for each question unless otherwise indicated. All “no previous button” screens should now be indicated.

[Preloading for returning respondents]

Define Returning=1 if returning respondents. Returning = 0 if new respondents.

If Returning==1, preload the following variables from the file prepared:

d_CURRENTJOB_YRSTART, d_LASTJOB_YRSTART, d_CAREERJOB_YRSTART,
d_CURRENTJOB_MOSTART, d_LASTJOB_MOSTART, d_CAREERJOB_MOSTART, d_Career_Self,
d_CurrentSelf, d_LastSelf, d_EVEREMPLOYED, d_LASTJOB_YRSTOP, d_LASTJOB_MOSTOP

The purpose of having preloads is to avoid asking the questions to which answers should not have changed between Survey 4 and 6. The classification of possible cases, and the modules that need to be asked for each case, is as in the following table.

Survey 4 status	Survey 6 status	Acronym	Modules should be asked
Working (Career)	Working (Same job)	WCWS	Selected Qs from Current job battery, On-the-job-search battery, HRS conditional retirement, Additional Modules.
Working (Career)	Working (Diff job)	WCWD	Current job battery, Selected Qs from Career job battery, Career job separation battery, Career-to-Bridge search battery, HRS conditional retirement, Additional Modules.
Working (Bridge)	Working (Same job)	WBWS	Selected Qs from Current job battery, (On-the-job-search battery), HRS conditional retirement, Additional Modules.
Working (Bridge)	Working (Diff job)	WBWD	Current job battery, Selected Qs from career-to-bridge search battery, HRS conditional retirement, Additional Modules.
Working (Career)	Not working (Had another job)	WCNA	Last job battery, Last job separation battery, Selected Qs from Career job battery, Career job separation battery, Career-to-Bridge search battery, Additional Modules.
Working (Career)	Not working (Didn't have another job)	WCN	Selected Qs from Last job battery, Last job separation battery, off-the-job search battery, Additional Modules
Working (Bridge)	Not working	WBNA	Last job battery, Last job separation battery, selected Qs from Career-to-Bridge search battery, Additional Modules

	(Had another job)		
Working (Bridge)	Not working (Didn't have another job)	WBN	Selected Qs from Last job battery, Last job separation battery, (off-the-job search battery) , Additional Modules
Not working (ever had a job)	Working	NEW	Current job battery, selected Qs from Career-to-Bridge search battery, HRS conditional retirement, Additional Modules.
Not working (never had a job)	Working	NNW	Current job battery, on-the-job search battery, HRS conditional retirement, Additional Modules.
Not working (ever had a job)	Not working (Had a job after survey 4)	NENA	Last job battery, Last job separation battery, selected Qs from Career-to-Bridge search battery, Additional Modules.
Not working (never had a job)	Not working (Had a job after survey 4)	NNNA	Last job battery, Last job separation battery, (off-the-job search battery) , Additional Modules
Not working (ever had a job)	Not working (Didn't have a job after survey 4)	NEN	(off-the-job search battery) , Additional Modules
Not working (never had a job)	Not working (Didn't have a job after survey 4)	NNN	Additional Modules

* All the cases will see an additional module if we decide to have one.

Cf) Prevalence of each working status from Survey 4

	Survey 4 count	(Expected Survey 6 count)*	
		Original sample	New sample
Working (career)	601	535	565
Working (bridge)	378	337	356
Retired (from career)	1337	1191	1258
Retired (from bridge)	434	387	408
Never worked	22	20	21

Expected survey 6 count is calculated based on 30% attrition rate for the new sample and 20% attrition rate for the original sample.

In calculating the expected count, I am using the distribution from the Survey 4. Hence, it is definitely an upper bound for counts for working sample and a lower bound for counts for retired sample.

VANGUARD RESEARCH INITIATIVE -- SURVEY 6**[DISPLAY SCREEN A. DISPLAY FULL TEXT AND QUESTION ON ONE SCREEN]**

Thank you for responding to our invitation to participate in Survey 6 of the Vanguard Research Initiative. The objective of this survey is to obtain greater understanding of your past and current jobs and plans for future work. For some of you (not all), this will be the second time we have asked about jobs and work. This is not an error; the questions in this survey are intended to supplement the information you have already provided.

In this survey, we will ask about expectations and preferences. We will also ask that you imagine yourself to be in hypothetical situations and make hypothetical choices. Such questions about even hypothetical late-in-life decisions may be sensitive. They have no right or wrong answers, but obtaining a response is important for our research.

We recognize that your relationship with Vanguard is based on trust and that you expect us to act responsibly and in your best interests. Your responses will be included along with those of the thousands of other respondents participating in this survey to provide an overall picture. Please be assured that the information you provide will be kept confidential and used for research purposes only. If you have any questions about this study, please contact Vanguard Principal John Ameriks at (610) 669-5577.

Vanguard is partnering with Ipsos, a renowned, nationally-recognized survey research organization, to assist with the management and administration of this survey. Ipsos has been engaged by Vanguard for previous research initiatives during the past several years.

To indicate your informed consent to continue as a member of the Vanguard Research Initiative and to proceed to the survey, please select "I would like to continue" below.

If you do not wish to participate, please select "No thanks" below or close your browser.

Please note: You may leave the survey at any time and return at a time more convenient for you. Please wait at least 10 minutes before attempting to reenter the survey. When you return you will be taken back to the point in the survey where you left off.

For optimal viewing of this survey, it is best to complete this survey on a laptop or desktop computer.

Please select one.

I would like to continue.

No thanks.

[PROG: DISPLAY SCREEN A IS MANDATORY QUESTION. IF "NO THANKS", TERMINATE & DISPLAY TERMINATE TEXT; OTHERWISE, CONTINUE TO SWEEPSTAKES SCREEN.]

[PROG: TERMINATE TEXT:

Thank you very much for your time and consideration in participating in our research. You may close your browser window.

[NOTE TO PROGRAMMING---PREVIOUS LOGIC: Previous button should be on within sections, and off at section breaks. At the end of each section there is a screen which warns that they are leaving the current section, and upon clicking next they enter the first screen of the next section. The previous button should be on at the warning screen, but there should not be a previous button on the screen at the start of the new section.]

Please turn previous OFF during the verification sections/loops on the strategic survey patterns. There are two other tables where previous logic is turned off. Note that there are actually three such tables, but the last one is at the end of a section, anyway.]

[Sweepstakes Screen (second screen respondents see after entering the survey)]

Thank you for your interest in participating in this survey for the Vanguard Research Initiative.

During the survey please do not use your browser's FORWARD and BACK buttons. Instead please use the button below to move through the survey. To begin, just click on the "Next" button below. This will take you right into today's survey.

As a reminder, clients who complete the Vanguard Research Initiative Survey will receive a \$10 thank you Amazon E-certificate, and, if you'd like, insights into high level learning from the research as the project proceeds.

[CHECKPOINT: DEMOGRAPHICS REFRESHER]

[NOTE: DEMOGRAPHIC REFRESHER ESSENTIALLY IDENTICAL TO SURVEY 1 CODE, SO PROGRAMMING CAN BE RECYCLED].

Q1 In what month and year were you born?

[PROG: INSERT DROP DOWN MENU SHOWING AS CHOICES: BEFORE 1912; SINGLE YEARS FOR 1912 THRU 1984; AFTER 1984. STORE YEAR AS VARIABLE `YRBIRTH`, AN INTEGER VALUE FOR USE IN AGE CHECKS. IF BEFORE 1912, STORE INTEGER VALUE AS `106`. IF INTEGER VALUE AFTER 1984 SELECTED, STORE INTEGER VALUE AS `32`. SHOW DROP DOWN MENU FOR 12 MONTHS IN THE YEAR.]

[PROGRAMMER: Calculate AGE in years using difference of current month and year and month and year of birth.]

[PROG: IF AGE=>50, GO TO Q2a]

Q1a You have indicated that you are less than 50 years old. Is this correct?

Yes

No

[PROG: IF YES, DISPLAY THE FOLLOWING TEXT AND EXIT. "Thank you very much for your interest and willingness to participate in our research. Unfortunately, you are not in the age range of interest for this survey. Thank you once again for your willingness to participate; you may close your browser window." EXIT SURVEY]

[PROG: IF NO, DISPLAY "Please correct your month and year of birth." AND GO TO QUESTION 1 AGAIN.]

[PROG: If Q1 is displayed again]

Q2a Please indicate your gender.

Male

Female

Q2 What is your current marital status?

Please select one.

Married

Single, never married

Widowed

Divorced

Separated

Unmarried, but share a financial future with a partner

[CREATE VARIABLE:

String variable SPOUSE= "spouse" if Q2="Married"; SPOUSE="partner" if Q2="Unmarried, but share a financial future with a partner"

FILL IN "spouse" or "partner" IN MANY QUESTIONS THAT FOLLOW USING THIS VARIABLE]

[ALSO CREATE MARRIED FLAG FOR RESPONDENTS, WHICH DETERMINES WHETHER WE GATHER INFO ON A SPOUSE. QM = YES IF Q2= 'Married' OR Q2 = 'Unmarried, but share a financial future with a partner', OTHERWISE QM = NO.]

Q3 Would you say your health is excellent, very good, good, fair, or poor?

Excellent

Very good

Good

Fair

Poor

[ASK Q4 IF QM=TRUE]

Q4a In what month and year was your SPOUSE born ?

[Drop down menu]

[PROG: INSERT DROP DOWN MENU SHOWING AS CHOICES: BEFORE 1912; single years for 1912 thru 1984; AFTER 1984.]

Q4 Would you say your SPOUSE's health is excellent, very good, good, fair, or poor?

Excellent

Very good

Good

Fair

Poor

Q5 What was the approximate total combined income for you [PROG: IF QM=YES DISPLAY: and your SPOUSE] during 2017? You may respond by listing your household's "Adjusted Gross Income" (AGI) as computed for your 2017 tax return, or provide an estimate of your household's total income for 2017.

Adjusted gross income (AGI) appears as a line item on your federal income tax return. It is calculated as your gross income from taxable sources minus allowable deductions, such as unreimbursed business expenses, medical expenses, alimony, and deductible retirement plan contributions.

[PROG: ACCEPT ANY NUMERIC INTEGER RESPONSE FROM 0/100,000,000 IN BLANK. ALSO CREATE AN INDICATOR/CHECK BOX TO INDICATE "This is my AGI from tax return"]

[PROGRAMMER NOTE: DISPLAY COMMAS WHEN NUMERIC IS BEING ENTERED AT THE THOUSAND AND MILLION MARKS]

[FILL BOX, format with commas] Dollars

[] This is my AGI from tax return [CHECKBOX] [PROG: RESPONDENT CAN ENTER DOLLAR AMOUNT AND CHECK BOX, OR ENTER DOLLAR AMOUNT ONLY]

Q6 What is your current employment situation?
Please check all that apply. [PN: Allow any response(s); no need for mutually exclusive]

Working full-time (including self-employment) [PROG DEFINE CURRENTLY_EMPLOYED=YES]

Working part-time (including self-employment) [PROG REPLACE CURRENTLY_EMPLOYED=YES]

Unemployed and looking for work

Temporarily laid off

On sick leave or other leave

Disabled

Homemaker

Retired [PROG DEFINE RETIRED=YES]

Other [SPECIFY: FILL IN BOX]

Q7 During 2018, what do you expect your total earnings to be (if any) before taxes, from all jobs for the entire year (including self-employment income)? Please include **++only++** your own earnings from jobs or self-employment, if any. Please exclude all other forms of income (e.g., pension payments, distributions from retirement accounts, dividends, interest, capital gains, rental income, etc.).

Approximately _____ dollars in 2018 **[0/100,000,000]**

[] I expect to have no earnings in 2018 [CHECKBOX]

[PROG ASK Q8 IF RETIRED=YES, OTHERWISE SKIP TO Q10]

Q8 In what month and year did you retire? [DROP DOWN][Range 1900-2018 **Must be <=Current Age in Q1**]

Q9 Are you completely retired?

[YES-SKIP TO PN ABOVE Q11

NO-ASK Q10]

[PN: IF Q9=NULL, Ask Q10]

Q10 At what age do you expect to completely retire?

Age ___ [**50-125. Must be >=Current Age in Q1**]

_ I do not plan to ever retire completely

_ Not applicable [PN – Only show this option if Disabled, Homemaker, or Other]

[PROG: above are mutually exclusive, Can't select either box + Age]

[PROCEED IF QM=YES, OTHERWISE SKIP TO LABOR_MARKET_STATUS CHECKPOINT]

Q11 What is your SPOUSE's current employment situation?

Please check all that apply. [PN: Allow any response(s); no need for mutually exclusive]

Working full-time (including self-employment)

Working part-time (including self-employment)

Unemployed and looking for work

Temporarily laid off

On sick leave or other leave

Disabled

Homemaker

Retired

Other [SPECIFY: FILL IN BOX]

Q12 During 2018~~2017~~, what do you expect your SPOUSE's total earnings to be (if any) before taxes, from all jobs for the entire year (including self-employment income)? Please include only your SPOUSE's earnings from jobs or self-employment, if any. Please exclude all other forms of income (e.g., pension payments, distributions from retirement accounts, dividends, interest, capital gains, rental income, etc.).

Approximately _____ dollars in 2018~~2017~~ [**0/100,000,000**]

[] My SPOUSE expects to have no earnings in 2018~~2017~~ [CHECKBOX]

Q13 [ASK if Q11=Retired, ELSE SKIP TO Q15] At what age did your SPOUSE retire?

[Number] [Range: 18-125 **Must be <=Current Age in Q4a**]

Q14 Is your SPOUSE completely retired?

[YES-SKIP TO PN ABOVE Q16

NO-ASK Q15]

[PN: IF Q14=NULL, Ask Q15]

Q15 At what age does your SPOUSE expect to retire completely?

Age ____ [18-125. Must be >=Current Age in Q4a]

My SPOUSE does not plan to ever retire completely

Not applicable [PN – Only show this option is Q11=Disabled, Homemaker, Other]

[PROG: above are mutually exclusive, Can't select either box + Age]

[CHECKPOINT: LABOR_MARKET_STATUS]

[PROG: CREATE VARIABLE CAREER_AGE=40]

[PN: If (Q6 Working Full-time=yes or Working part-time=yes) and Returning==0, skip to checkpoint: current_job_battery].

[PN: If (Q6 Working Full-time=yes or Working part-time=yes) and Returning==1, skip to BREAKPOINT RETURNING RESPONDENT CLASSIFICATION].

Q16 Are you doing any work for pay at the present time?

Yes

No

[PROG REPLACE CURRENTLY_EMPLOYED=YES if Q16=YES.

If CURRENTLY_EMPLOYED=YES and Returning==0, THEN SKIP TO CHECKPOINT: CURRENT_JOB_BATTERY.

If CURRENTLY_EMPLOYED=YES and Returning==1, THEN SKIP TO BREAKPOINT RETURNING RESPONDENT CLASSIFICATION.

ELSE, PROG REPLACE CURRENTLY_EMPLOYED=NO]

[If Returning==1, then skip to BREAKPOINT RETURNING RESPONDENT CLASSIFICATION]

Q17 In your lifetime, have you ever worked on a job for more than a few months?

Yes

No

[PROG: If NO, DEFINE EVEREMPLOYED=NO, go to CHECKPOINT: **ADDITIONAL MODULE**]

[PROG: If YES, DEFINE EVEREMPLOYED=YES; GO TO CHECKPOINT: LAST_JOB_BATTERY]

[BREAKPOINT RETURNING RESPONDENT CLASSIFICATION]

[If d_CURRENTJOB_YRSTART is undefined and d_EVEREMPLOYED=YES and CURRENTLY_EMPLOYED=Yes, then define Return_case = "NEW" and GO TO CHECKPOINT CURRENT_JOB_BATTERY].

[If d_CURRENTJOB_YRSTART is undefined and d_EVEREMPLOYED=NO and CURRENTLY_EMPLOYED=Yes, then define Return_case = "NNW" and GO TO CHECKPOINT CURRENT_JOB_BATTERY].

[Ask this questions if d_CURRENTJOB_YRSTART is defined and CURRENTLY_EMPLOYED=Yes . Otherwise move to the next question.]

Q17a In the 2015 survey, you reported that you were working on a job that you started working in d_CURRENTJOB_YRSTART. Are you currently working on the same job?

Yes

No

[If d_CAREERJOB_YRSTART is undefined and Q17a==Yes, then define Return_case = "WCWS" and GO TO CHECKPOINT CURRENT_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is undefined and Q17a==No, then define Return_case = "WCWD" and GO TO CHECKPOINT CURRENT_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is defined and Q17a==Yes, then define Return_case = "WBWS" and GO TO CHECKPOINT CURRENT_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is defined and Q17a==No, then define Return_case = "WBWD" and GO TO CHECKPOINT CURRENT_JOB_BATTERY]

[Ask this questions if d_CURRENTJOB_YRSTART is defined and CURRENTLY_EMPLOYED=No . Otherwise move to the next question.]

Q17b In the 2015 survey, you reported that you were working on a job that you started working in d_CURRENTJOB_YRSTART. Have you had a different job since then?

Yes

No

[If d_CAREERJOB_YRSTART is undefined and Q17b==Yes, then define Return_case = "WCNA" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is undefined and Q17b==No, then define Return_case = "WCN" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is defined and Q17b==Yes, then define Return_case = "WBNA" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[If d_CAREERJOB_YRSTART is defined and Q17b==No, then define Return_case = "WBN" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[Ask this questions if d_LASTJOB_YRSTART is defined and CURRENTLY_EMPLOYED=No . Otherwise move to the next question.]

Q17c In the 2015 survey, you reported that your last job was the one you started working in d_LASTJOB_YRSTART. Have you had a different job since then?

Yes

No

[If d_EVEREMPLOYED=Yes and Q17c==Yes, then define Return_case ="NENA" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[If d_EVEREMPLOYED=Yes and Q17c==No, then define Return_case ="NEN" and GO TO CHECKPOINT SEARCH_MODULE_2]

Q17d In the 2015 survey, you reported that you never worked on a job for more than a few months in your lifetime. Have you had a job since then?

Yes

No

[If Q17d==Yes, then define Return_case ="NNNA" and GO TO CHECKPOINT LAST_JOB_BATTERY]

[If Q17d==No, then define Return_case ="NNN" and GO TO CHECKPOINT **ADDITIONAL MODULE**]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: CURRENT_JOB_BATTERY]

[NO PREVIOUS BUTTON HERE]

Q18 On your current (main) job, do you work for someone else, or are you self-employed? (If you have more than one job, the main job is the one that is most important to you.)

1. Work for someone else
2. Self-employed

[DEFINE CURRENT_SELF=TRUE IF “Self-employed”, ELSE CURRENT_SELF=FALSE if “Work for someone else”]

Q18a Do you have any other jobs currently?

- Yes
No

[If Q18a=YES, Display (“Please refer only to your main job in the following section.)

Q19 [ASK IF CURRENT_SELF=FALSE] Are you salaried on this job, paid by the hour, paid on commission, or other?

1. Paid a regular salary
2. Paid an hourly wage
3. Paid on commission (with or without base salary)
4. Other arrangement [Specify] [PN: Specify text is Non-Mandatory]

Q20 Last year, how much were you paid on this job before taxes and other deductions? (Please exclude pension payments and distributions from retirement accounts.)

If you recently started this job, please give your expected annual pay before taxes and other deductions.

[PROG: IF CURRENT_SELF=TRUE, Display (Include self-employment earnings or profits)]

[FILL BOX, format with commas] Dollars last year [SAVE AS SALARY_CURRENT]
[0-100,000,000]

[If Return_case = “WCWS” or “WBWS”, Go To Q24a]

Q22 What industry do you work in?

[DROP DOWN LIST INDUSTRY] [SAVE AS INDUSTRY_CURRENT]

Q23a. What is your occupation?

[DROP DOWN LIST OCCUPATION1]

Q23b. Please indicate, from the drop-down list below, your more detailed occupation. [DROP DOWN LIST, OCCUPATION2 AS APPROPRIATE]

[IF OCCUPATION2 IS NOT NULL, SAVE OCCUPATION2 AS OCCUPATION_CURRENT. IF OCCUPATION2 IS NULL, SAVE OCCUPATION1 AS OCCUPATION_CURRENT

This is a Non-Mandatory question, so Occupation2 could be null]

[PN: Put Occupation 1 & Occupation2 on same screen]

Last year, what was your work schedule? If you recently started your job, please tell us about your current work schedule. Count paid vacation as work.

Q24a [ALLOW INTEGER 1-99] hours per week [SAVE AS HOURS_CURRENT]

Q24b [ALLOW INTERER 1-52] weeks per year [SAVE AS WEEKS_CURRENT]

We would like to know if you can change your regular work schedule. By *regular work schedule*, we mean your typical hours per week (for example, full-time versus part-time) and the typical weeks per year (for example, working year-round versus having summers or winters off). If you were to change the amount you worked, earnings would change proportionately.

Q25 If you wanted to work a different regular work schedule, would your [PROG: IF CURRENT_SELF=FALSE, Display(employer)] [PROG: IF CURRENT_SELF=TRUE, Display(business)] allow you to change your regular hours per week? (Select all that apply)

[PN: Allow respondents to choose the first two options at the same time.]

Yes, I can change which days/hours I regularly work each week

Yes, I can change the total number of days/hours I regularly work each week

No, I cannot change my regular work schedule

Q25a If you wanted to change your work schedule (e.g., change workday start and finish times or days of work during a week) frequently, would your [PROG: IF CURRENT_SELF=FALSE, Display(employer)] [PROG: IF CURRENT_SELF=TRUE, Display(business)] allow that?

Yes

No

Q26 If you wanted to work a different regular work schedule, would your [PROG: IF CURRENT_SELF=FALSE, Display(employer)] [PROG: IF CURRENT_SELF=TRUE, Display(business)] allow you to change your regular weeks per year?

Yes

No

[IF Q25 = YES OR Q26=YES, ASSIGN FIXED_CURRENT=NO. ELSE, ASSIGN FIXED_CURRENT=YES]

Q27 Do you obtain health insurance through your [PROG: IF CURRENT_SELF=FALSE, Display(employer)] [PROG: IF CURRENT_SELF=TRUE, Display(business)]?

Yes

No

~~[If Return_case = "WCWS" or "WBWS" or "NNW" then Go To SEARCH_MODULE_1]~~

~~[If Return_case = "WCWD" then Go To CAREER_JOB_BATTERY]~~

~~[If Return_case = "WBWD" or "NEW" then Go To SEARCH_MODULE_3]~~

[If Return_case = "WCWS" or "WBWS" then Go To SEARCH_MODULE_1]

Q28 In what month and year did you start working for your [PROG: IF CURRENT_SELF=FALSE, Display(employer)] [PROG: IF CURRENT_SELF=TRUE, Display(business)]?

[DROP DOWN] [SAVE AS CURRENTJOB_YRSTART, CURRENTJOB_MOSTART]

[Range: 1900-2018][CURRENTJOB_YRSTART has to be greater than YRBIRTH]

~~[If Return_case = "WCWS" or "WBWS" or "NNW" then Go To SEARCH_MODULE_1]~~

~~[If Return_case = "WCWD" then Go To CAREER_JOB_BATTERY]~~

~~[If Return_case = "WBWD" or "NEW" then Go To SEARCH_MODULE_3]~~

Q29 We are interested in knowing the longest or main job you have had since age ++CAREER_AGE++. Consider multiple positions at the same employer as a single "job." Is the job you just described the longest or main job you have had since age ++CAREER_AGE++?

Yes, this is my longest or main job since age ++CAREER_AGE++ [Q29=YES]

No, another job is my longest or main job since age ++CAREER_AGE++ [Q29=NO]

No, I have had more than one job of similar length and importance to my current job since age ++CAREER_AGE++ [Q29=YES.MULTIPLE]

[If (YES OR YES,MULTIPLE), DEFINE CURRJOB_CAREER=TRUE, DEFINE CAREER_SELF=CURRENT_SELF IF CURRJOB_CAREER=TRUE, GO TO CHECKPOINT: SEARCH_MODULE_1]

[If NO, DEFINE CURRJOB_CAREER=FALSE, proceed to CHECKPOINT: CAREER_JOB_BATTERY]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below.

Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: LAST_JOB_BATTERY]

[NO PREVIOUS BUTTON HERE]

Q30 On the most recent job you had, did you work for someone else, or were you self-employed?

1. Work for someone else
2. Self-employed

[PROG: DEFINE LAST_SELF=FALSE IF "Work for someone else", ELSE DEFINE LAST_SELF=TRUE IF "Self-employed"]

Q31 [ASK IF LAST_SELF=FALSE] Were you salaried on that job, paid by the hour, paid on commission, or other?

1. Paid a regular salary
2. Paid an hourly wage
3. Paid on commission (with or without base salary)
4. Other arrangement [Specify] [PN: Specify text is Non-Mandatory]

Q32 What did you earn the last year you worked? Specifically, how much were you paid before taxes and other deductions? (Please exclude pension payments and distributions from retirement accounts).

[PROG: IF LAST_SELF=TRUE, Display (Include self-employment earnings or profits)]

[FILL BOX, format with comma] Dollars in the last year worked [SAVE AS SALARY_LAST] [0/100,000,000]

[If Return_case = "WCN" or "WBN", Go To Q35a]

Q33 What industry did you work in?

[DROP DOWN LIST INDUSTRY] [SAVE AS INDUSTRY_LAST]

Q34a What was your occupation?

[DROP DOWN LIST OCCUPATION1]

Q34b Please indicate, from the drop-down list below, your more detailed occupation.

[DROP DOWN LIST, OCCUPATION2 AS APPROPRIATE]

[IF OCCUPATION2 IS NOT NULL, SAVE OCCUPATION2 AS OCCUPATION_LAST. IF OCCUPATION2 IS NULL, SAVE OCCUPATION1 AS OCCUPATION_LAST]

[PN: Put Occupation 1 & Occupation2 on same screen]

What was your work schedule the last year you worked? Count paid vacation as work.

Q35a [ALLOW INTEGER 1-99] hours per week [SAVE AS HOURS_LAST]

Q35b [ALLOW INTERER 1-52] weeks per year [SAVE AS WEEKS_LAST]

We would like to know if you could have changed your regular work schedule. By *regular work schedule*, we mean your typical hours per week (for example, full-time versus part-time) and the typical weeks per year (for example, working year-round versus having summers or winters off). If you were to change the amount you worked, earnings would change proportionately.

Q36 If you had wanted to work a different regular work schedule, would your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: LAST_SELF=TRUE, Display(business)] have allowed you to change your regular hours per week? (Select all that apply) [PN: Allow respondents to choose the first two options at the same time.]

Yes, I could change which days/hours I regularly work each week

Yes, I could change the total number of days/hours I regularly work each week

No, I could not change my regular work schedule

Q36a If you had wanted to change your work schedule (e.g., change workday start and finish times or days of work during a week) frequently, would your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: LAST_SELF=TRUE, Display(business)] have allowed that?

Yes

No

Q37 If you had wanted to work a different regular work schedule, would your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: IF LAST_SELF=TRUE, Display(business)] have allowed you to change your regular weeks per year?

Yes

No

[IF Q36 = YES OR Q37=YES, ASSIGN FIXED_LAST=NO. ELSE, ASSIGN FIXED_LAST=YES]

Q38 Did you obtain health insurance through your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: IF LAST_SELF=TRUE, Display(business)]?

Yes

No

[If Return_case = "WCN" or "WBN", Go To Q40]

Q39 In what month and year did you start working for your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: IF LAST_SELF=TRUE, Display(business)] ? [Range: 1900-2018] [CURRENTJOB_YRSTART has to be greater than YRBIRTH]

[DROP DOWN] [SAVE AS LASTJOB_YRSTART, LASTJOB_MOSTART]

Q40 In what month and year did you stop working for your [PROG: IF LAST_SELF=FALSE, Display(employer)] [PROG: IF LAST_SELF=TRUE, Display(business)]? [Range: 1900-2018]

[DROP DOWN] [SAVE AS LASTJOB_YRSTOP, LASTJOB_MOSTOP]

[CONSISTENCY CHECK: IF LASTJOB_YRSTOP < LASTJOB_YRSTART OR (LASTJOB_YRSTOP=LASTJOB_YRSTART & LASTJOB_MOSTOP<LASTJOB_MOSTART), DEDISPLAY SCREEN WITH FOLLOWING TEXT “It appears that the start date for this job is after its end date. Please verify start and end dates.”]

[PROCEED TO CHECKPOINT: LASTJOB_SEPARATION_BATTERY]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: LASTJOB_SEPARATION_BATTERY]

[NO PREVIOUS BUTTON HERE]

Q41 Why did you stop working for [PROG: IF LAST_SELF=FALSE, Display(this employer)][PROG: IF LAST_SELF=TRUE, Display(this business)]? Check all that apply.

Laid off

~~Retirement~~

Childcare

Other family-care or personal obligations

Own illness

Own injury

School/Training

Discharged/Fired

Employer closed business or bankrupt /Closed business or bankrupt

Employer sold business / Sold business

Job was temporary that ended

Quit to take another job

Slack work or business conditions [IF YES, BADECONOMY=TRUE]

Unsatisfactory work arrangements (hours, pay, etc.)

[Taxation or accumulation rules relating to Social Security or pension](#)[Retirement](#)

Some other reason [Specify] [PN: Specify text is Non-Mandatory]

Q42 [IF MORE THAN ONE CHECKED IN Q41

If OS-Text box is filled-in; bring wording into Q42.

If ONLY 'Some other reason' is selected & OS-TextBox is NOT filled-in; Then do NOT bring anything into Q42. Only bring in whatever else they chose in previous question (Q41)]

What was the main reason you stopped working?

[PROGRAMMER: LIST ALL REASONS IN Q41; RADIO; CHECK ONE ENFORCED]

[NEW SCREEN]

Q43. At the time you left [PROG: IF LAST_SELF=FALSE, Display(this employer)][PROG: IF LAST_SELF=TRUE, Display(this business)], would you say your health was excellent, very good, good, fair, or poor?

Excellent

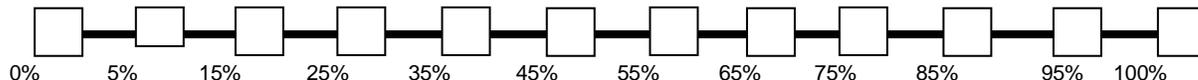
Very good

Good

Fair

Poor

[PROGRAMMING: Define VRI PERCENT SCALE for use in several questions below. Please create a radio button/ "X-box" scale with the numbers and boxes/buttons provided below. Allow only one button to be chosen.



Q44 [IF Q43=Fair, Poor] Suppose you had been in good or better health at the time. What is the percent chance you would still have stopped working?

[VRI Percent scale]

Q45 [IF Q43=Excellent, Very good, Good] Suppose you had been in poor or fair health at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q46 [PROG: IF LAST_SELF=TRUE, Display("Were you"), ELSE IF LAST_SELF=FALSE, Display("Was your employer")] laying off workers, or were business conditions bad at the time you stopped working?

Yes

No

Q47 [IF Q46=YES] Suppose business conditions had been good at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q48 [If Q46=NO] Suppose business conditions had been bad at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

[PROGRAMMER: Create variable

If LAST_SELF=YES, EMP_SIT_FILL_LAST="that employment situation"

Else EMP_SIT_FILL_LAST="that employer"]

[Programmer: If Return_case = "WCNA" or "WBNA" or "NENA" or "NNNA", create a variable Last_short = Yes.]

[Programmer: If Returning ==0 and LASTJOB_YRSTOP - LASTJOB_YRSTART<=2, then create a variable Last_short = Yes.]

[Programmer: If (Return_case = "WCN" or "WBN ") and LASTJOB_YRSTOP - d_CURRENTJOB_YRSTART<=2, then create a variable Last_short = Yes.]

[If Last_short==Yes then skip to Q48d]

Q48a What is the percent chance when you stopped working that ++EMP_SIT_FILL_LAST++ would have offered you the same or better earnings and working conditions than you had two years earlier?

[VRI percent scale]

If Q48a<100, ask

Q48a2 If you had been offered lower earnings, how much lower would you expect them to have been?

[fill in box]% [Allow 1-100]

Q48b Suppose that ++EMP_SIT_FILL_LAST++ would have offered you worse earnings and working conditions than you had two years earlier. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q48c Suppose that ++EMP_SIT_FILL_LAST++ would have offered you the same or better earnings and working conditions than you had two years earlier. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q48d What is the percent chance when you stopped working that ++EMP_SIT_FILL_LAST++ would have offered you the option to work half-time for half of your earnings?

[VRI percent scale]

Q48e Suppose that ++EMP_SIT_FILL_LAST++ would not have offered you the option to work half-time for half of your earnings. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q48f Suppose that ++EMP_SIT_FILL_LAST++ would have offered you the option to work half-time for half of your earnings. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q49 At the time you stopped working, was any of the following occurring? Check all that apply.

- Supervisor encouraged departure
- Coworker encouraged departure
- Wages reduced (or about to be reduced)
- Hours reduced (or about to be reduced)
- Would have been laid off
- New job duties
- New job location
- Became eligible for a pension
- Employer changed health insurance
- Special early retirement incentive offer
- Other [SPECIFY FILL IN][PN: Specify text is Non-Mandatory]
- None of the above

~~Q50—Suppose you could have continued in the job working part time at the time you stopped working. What is the percent chance you would have still stopped working?~~

~~[VRI percent scale]~~

~~[CHECK: IF LASTJOB_YRSTOP-YRBIRTH<=40, ASSIGN PREVJOB_CAREER=TRUE, GO TO CHECKPOINT: SEARCH_MODULE_2]~~

~~[If Return_case = "WCN" or "WBN" or "NNNA" then Go To SEARCH_MODULE_2]~~

~~[If Return_case = "WCNA" then Go To CAREER_JOB_BATTERY]~~

~~[If Return_case = "WBNA" or "NENA" then Go To SEARCH_MODULE_3]~~

Q51 We are interested in knowing the longest or main job you have had since age ++CAREER_AGE++. Consider multiple positions at the same employer as a single "job." Is the job you just described the longest or main job you have had since age ++CAREER_AGE++?

Yes, this is my longest or main job since age ++CAREER_AGE++ [Q51=YES]

No, another job is my longest or main job since age ++CAREER_AGE++ [Q51=NO]

No, I have had more than one job of similar length and importance to my last job since age ++CAREER_AGE++ [Q51=YES.MULTIPLE]

[PROG: IF YES OR YES.MULTIPLE, DEFINE PREVJOB_CAREER=TRUE, REPLACE CAREER_SELF=LAST_SELF IF PREVJOB_CAREER=TRUE, GO TO CHECKPOINT: SEARCH_MODULE_2]

[PROG: IF NO, DEFINE PREVJOB_CAREER=FALSE, GO TO CHECKPOINT: CAREER_JOB_BATTERY]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: CAREER_JOB_BATTERY]

[NO PREVIOUS BUTTON HERE]

[If Returning==1, then define CAREERJOB_MOSTART=d_CURRENTJOB_MOSTART and CAREERJOB_YRSTART=d_CURRENTJOB_YRSTART]

Please think about the main or longest job you had since age ++CAREER_AGE++.

Q52 On that job, did you work for someone else, or were you self-employed?

1. Work for someone else
2. Self-employed

[PROG REPLACE CAREER_SELF = TRUE IF "Self-employed", ELSE CAREER_SELF=FALSE IF "Work for someone else"]

Q53 This question asks about your main or longest job since age ++CAREER_AGE++.

[IF CAREER_SELF=FALSE] Were you salaried on that job, paid by the hour, paid on commission, or other?

Paid a regular salary

Paid an hourly wage

Paid on commission (with or without base salary)

Other arrangement [Specify] [PN: Specify text is Non-Mandatory]

Q54 This question asks about your main or longest job since age ++CAREER_AGE++.

What did you earn the last year you worked? Specifically, how much were you paid before taxes and other deductions? (Please exclude pension payments and distributions from retirement accounts).

[PROG: IF CAREER_SELF==TRUE, Display (Include self-employment earnings or profits)]

[FILL BOX, format with comma] Dollars in the last year [SAVE AS SALARY_CAREER]

[0-100,000,000]

This question asks about your main or longest job since age ++CAREER AGE++".

What was your work schedule the last year you worked? Count paid vacation as work.

Q55a [ALLOW INTEGER 1-99] hours per week [SAVE AS HOURS_CAREER]

Q55b [ALLOW INTERER 1-52] weeks per year [SAVE AS WEEKS_CAREER]

We would like to know if you could have changed your regular work schedule. By *regular work schedule*, we mean your typical hours per week (for example, full-time versus part-time) and the typical weeks per year (for example, working year-round versus having summers or winters off). If you were to change the amount you worked, earnings would change proportionately.

Q56 This question asks about your main or longest job since age ++CAREER AGE++".

If you had wanted to work a different regular work schedule, would your [PROG: IF CAREER_SELF=FALSE, Display(employer)] [PROG: IF CAREER_SELF=TRUE, Display(business)] have allowed you to change your regular hours per week? (Select all that apply) [PN: Allow respondents to choose the first two options at the same time.]

Yes, I could change which days/hours I regularly work each week

Yes, I could change the total number of days/hours I regularly work each week

No, I could not change my regular work schedule

Q56a If you had wanted to change your work schedule (e.g., change workday start and finish times or days of work during a week) frequently, [PROG: IF CAREER_SELF=FALSE, Display(employer)] [PROG: IF CAREER_SELF=TRUE, Display(business)] have allowed that?

Yes

No

Q57 This question asks about your main or longest job since age ++CAREER AGE++".

If you had wanted to work a different regular work schedule, would your [PROG: IF CAREER_SELF=FALSE, Display(employer)] [PROG: IF CAREER_SELF=TRUE, Display(business)] have allowed you to change your regular weeks per year?

Yes

No

[IF Q56 = YES OR Q57=YES, ASSIGN FIXED_CAREER=NO. ELSE, ASSIGN FIXED_CAREER=YES]

Q58 This question asks about your main or longest job since age ++CAREER AGE++".

Did you obtain health insurance through your [PROG: IF CAREER_SELF=FALSE, Display(employer)] [PROG: IF CAREER_SELF=TRUE, Display(business)]?

Yes

No

[PROG: IF CURRENTLY_EMPLOYED, create string variable JOBPREVIOUS= "current", ELSE
DEFINE JOBPREVIOUS= "last".]

[If Return_case = "WCWD" or "WCNA", Go To Q63]

Q59 This question asks about your main or longest job since age ++CAREER AGE++".

Were the industry and occupation the same as your JOBPREVIOUS job?

Yes

No

[PROG: IF YES, SKIP TO NEXT CHECK_POINT, FILL IN INDUSTRY_CAREER =
INDUSTRY_`JOBPREVIOUS` AND OCCUPATION_CAREER=OCCUPATION_`JOBPREVIOUS`]

Q60 This question asks about your main or longest job since age ++CAREER AGE++".

What industry did you work in?

[DROP DOWN LIST INDUSTRY] [SAVE AS INDUSTRY_CAREER]

Q61 This question asks about your main or longest job since age ++CAREER AGE++".

What was your occupation?

[DROP DOWN LIST OCCUPATION1]

Q61b. Please indicate, from the drop-down list below, your more detailed occupation. [DROP DOWN
LIST, OCCUPATION2 AS APPROPRIATE]

[IF OCCUPATION2 IS NOT NULL, SAVE OCCUPATION2 AS OCCUPATION_CURRENT. IF
OCCUPATION2 IS NULL, SAVE OCCUPATION1 AS OCCUPATION_CAREER

This is a Non-Mandatory question, so Occupation2 could be null]

[PN: Put Occupation 1 & Occupation2 on same screen]

[CHECK_POINT]

Q62 This question asks about your main or longest job since age ++CAREER AGE++".

In what month and year did you start working for your [PROG: IF CAREER_SELF=FALSE,
Display(employer)] [PROG: IF CAREERJOB_SELF=TRUE, Display(business)] ?

[DROP DOWN] [SAVE AS CAREERJOB_YRSTART, CAREERJOB_MOSTART]

[Range: 1900-2018]

[CURRENTJOB_YRSTART has to be greater than YRBIRTH]

Q63 This question asks about your main or longest job since age ++CAREER AGE++".

In what month and year did you stop working for your [PROG: IF CAREER_SELF=FALSE, Display(employer)] [PROG: IF CAREER_SELF=TRUE, Display(business)] ?

[DROP DOWN] [SAVE AS CAREERJOB _YRSTOP, CAREERJOB _MOSTOP]

[CHECK 1: IF CAREERJOB _YRSTART > CAREERJOB _YRSTOP OR (CAREERJOB _YRSTOP = CAREERJOB _YRSTART & CAREERJOB _MOSTOP < CAREERJOB _MOSTART), REDISPLAY SCREEN WITH FOLLOWING TEXT. "It appears that the start date for this job is after its end date. Please verify start and end dates."]

[CHECK 2: IF CURRENTLY_EMPLOYED = YES & CAREERJOB_YRSTOP > CURRENTJOB_YRSTART, OR (CAREERJOB_YRSTOP = CURRENTJOB_YRSTART & CAREERJOB_MOSTOP < CURRENTJOB_MOSTART),

Ask the following question:

Q63a. You indicated that the end date for your main/career job (Careerjob_mostop Careerjob_yrstop) is after you started your current job (currentjob_mostart currentjob_yrstar). Is this correct?

Yes

No

[PN: If Yes, proceed to CAREER_SEPARATION_BATTERY. If No, go back to Q63 if returning==1 & (Return_case == "WCWD" or "WCNA"), and go back to Q62 otherwise.]

[CHECK 3: IF CURRENTLY EMPLOYED = NO & EVEREMPLOYED=YES & CAREERJOB_YRSTOP > LASTJOB_YRSTART, OR (CAREERJOB_YRSTOP = LASTJOB_YRSTART & CAREERJOB_MOSTOP < LASTJOB_MOSTART),

Ask the following question:

Q63b. You indicated that the end date for your main/career job (Careerjob_mostop Careerjob_yrstop) is after you started your last job (Lastjob_mostart Lastjob_yrstart). Is this correct?

Yes

No

[PN: If Yes, proceed to CAREER_SEPARATION_BATTERY. If No, go back to Q63 if returning==1 & (Return_case == "WCWD" or "WCNA"), and go back to Q62 otherwise

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: CAREER_SEPARATION_BATTERY]

[NO PREVIOUS BUTTON HERE]

Q64 This question asks about your main or longest job since age ++CAREER AGE++".

Why did you stop working for [PROG: IF CAREER_SELF=FALSE, Display(this employer)][PROG: IF CAREER_SELF=TRUE, Display(this business)]? Check all that apply.

Laid off

~~Retirement~~

Childcare

Other family-care or personal obligations

Own illness

Own injury

School/Training

Discharged/Fired

Employer closed business or bankrupt / Closed business or bankrupt

Employer sold business / Sold business

Job was temporary that ended

Quit to take another job

Slack work or business conditions [IF YES, BADECONOMY=TRUE]

Unsatisfactory work arrangements (hours, pay, etc.)

Taxation or accumulation rules relating to Social Security or pension

Retirement

Some other reason [FILL IN] [PN: Specify text is Non-Mandatory]

Q65 This question asks about your main or longest job since age ++CAREER AGE++".

[IF MORE THAN ONE CHECKED IN Q64

If OS-Text box is filled-in; bring wording into Q65.

If ONLY 'Some other reason' is selected & OS-TextBox is NOT filled-in; Then do NOT bring anything into Q65. Only bring in whatever else they chose in previous question (Q64)]

What was the main reason you stopped working?

[PROGRAMMER: LIST ALL REASONS IN Q64; RADIO; CHECK ONE ENFORCED]

[NEW SCREEN]

Q66. This question asks about your main or longest job since age ++CAREER AGE++".

At the time you left [PROG: IF CAREER_SELF=FALSE, Display(this employer)][PROG: IF CAREER_SELF=TRUE, Display(this business)], would you say your health was excellent, very good, good, fair, or poor?

Excellent
 Very good
 Good
 Fair
 Poor

Q67 This question asks about your main or longest job since age ++CAREER AGE++".

[IF Q66=Fair, Poor] Suppose you had been in good or better health at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q68 This question asks about your main or longest job since age ++CAREER AGE++".

[If Q66=Excellent, Very Good, or Good] Suppose you had been in poor or fair health at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q69 This question asks about your main or longest job since age ++CAREER AGE++".

Was [PROG: IF CAREER_SELF=FALSE, Display(this employer)][PROG: IF CAREER_SELF=TRUE, Display(this business)]; laying off workers, or were its business conditions bad at the time you stopped working?

Yes
 No

Q70 This question asks about your main or longest job since age ++CAREER AGE++".

[IF Q69=YES] Suppose business conditions had been good at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q71 This question asks about your main or longest job since age ++CAREER AGE++".

[If Q69=NO] Suppose business conditions had been bad at the time. What is the percent chance you would still have stopped working?

[VRI percent scale]

[PROGRAMMER: Create variable

If CAREER_SELF=YES, EMP_SIT_FILL_CAREER="that employment situation"
Else EMP_SIT_FILL_CAREER="that employer"]

Q71a This question asks about your main or longest job since age ++CAREER AGE++".

What is the percent chance when you stopped working that ++EMP_SIT_FILL_CAREER++ would have offered you the same or better earnings and working conditions than you had two years earlier?

[VRI percent scale]

If Q71a<100, ask

Q71a2 If you had been offered lower earnings, how much lower would you expect them to have been?

[fill in box]% [Allow 1-100]

Q71b This question asks about your main or longest job since age ++CAREER AGE++".

Suppose that ++EMP_SIT_FILL_CAREER++ would have offered you worse earnings and working conditions than you had two years earlier. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q71c This question asks about your main or longest job since age ++CAREER AGE++".

Suppose that ++EMP_SIT_FILL_CAREER++ would have offered you the same or better earnings and working conditions than you had two years earlier. What is the percent chance you would ~~have~~ still have stopped working?

[VRI percent scale]

Q71d This question asks about your main or longest job since age ++CAREER AGE++".

What is the percent chance that when you stopped working that ++EMP_SIT_FILL_CAREER++ would have offered you the option to work half-time for half of your earnings?

[VRI percent scale]

Q71e This question asks about your main or longest job since age ++CAREER AGE++".

Suppose that ++EMP_SIT_FILL_CAREER++ would not have offered you the option to work half-time for half of your earnings. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q71f This question asks about your main or longest job since age ++CAREER AGE++".

Suppose that ++EMP_SIT_FILL_CAREER++ would have offered you the option to work half-time for half of your earnings. What is the percent chance you would still have stopped working?

[VRI percent scale]

Q72 This question asks about your main or longest job since age ++CAREER AGE++".

At the time you stopped working, was any of the following occurring? Check all that apply.

- Supervisor encouraged departure
- Coworker encouraged departure
- Wages reduced (or about to be reduced)
- Hours reduced (or about to be reduced)
- Would have been laid off
- New job duties
- New job location
- Became eligible for a pension
- Employer changed health insurance
- Special early retirement incentive offer
- Other [SPECIFY FILL IN] [PN: Specify text is Non-Mandatory]
- None of the above

Q73 This question asks about your main or longest job since age ++CAREER AGE++".

Suppose you could have continued in the job working part-time at the time you stopped working. What is the percent chance you would still have stopped working?

[VRI percent scale]

[GO TO CHECKPOINT: SEARCH_MODULE_3]

DISPLAY ON NEW SCREEN

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[PN: Previous Button should be on this screen]

[CHECKPOINT: SEARCH_MODULE_1]

[NO PREVIOUS BUTTON HERE]

[PROG CREATE VARIABLE SHORT_JOB==TRUE if CURRJOB_CAREER=TRUE & CURRENTJOB_YRSTART =2015 & CURRENTJOB_MOSTART>=12 or (CURRENTJOB_YRSTART>=2016)]

Q74 [IF SHORT_JOB, Display("On your current job"),ELSE Display("Within the last 2 years")] have you ever looked for another employment situation? [NOTE TO PROGRAMMER: allow option of selecting first two options].

- Yes, work as an employee
- Yes, self-employment
- No

Q75 [IF Q74=YES] What were you looking for in the different employment situation?

	Yes	No	Didn't matter
Different industry from current job			
Different occupation from current job			
More pay than current job			
Less commuting time than current job			
Less responsibility than current job			
More job security than current job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q75a [IF Q74=YES] Suppose you keep looking for another employment situation. How likely do you think it is that, in a year, you will find any job opportunity that you would accept?

Answer: [VRI Scale]

Q75b [IF Q74=NO] We understand that you did not look for another job opportunity. Nonetheless, we are still interested in what characteristics you might have looked for had you looked for such an opportunity. Suppose you were to look for another employment situation. What would you look for in that employment situation?

	Yes	No	Doesn't matter
Different industry from current job			
Different occupation from current job			
More pay than current job			
Less commuting time than current job			
Less responsibility than current job			
More job security than current job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q75c [IF Q74=NO] Suppose you were to look for another employment situation. How likely do you think it would be that, in a year, ~~that you will~~ would find any job opportunity that you would accept?

Answer: [VRI Scale]

Q76 [IF SHORT_JOB, Display("On your current job"),ELSE Display("Within the last 2 years")] did you ever have another employment opportunity—either one you sought or one that otherwise arose?

Yes

No

[IF Q76=NO or BLANK, GO TO CHECKPOINT: HRS_CONDITIONAL_RETIREMENT]

Q77 [If Q76=YES] Please think about the most attractive such opportunity. How does it differ compared to your current job? Please check all that apply.

[Program as Multi-punch question in a single column]

Different industry from current job	
Different occupation from current job	
More pay than current job	
Less commuting time than current job	
Less responsibility than current job	
More job security than current job	
Better health insurance	
More flexible hours	
More flexible schedule (e.g., summers or winters off)	
More of my own boss	
Better work location	
Better coworkers	
Better boss	

Q78 Continuing to think about this most attractive opportunity, we are interested in why you decided NOT to accept it or pursue it. Please check all that apply.

Industry	
Occupation	
Pay	
Commuting time	
Responsibility	
Job security	
Health insurance	
Hours not flexible	
Schedule not flexible (no summers or winters off)	
Not my own boss	
Work location	
Coworkers	
Boss	

Q79 [If more than one is selected] Please check the main feature of the job that made you decide not to accept it.

[NOTE TO PROGRAMMER: List all selected from previous question]

Q80 Continuing to think about this most attractive opportunity, how much would it have paid per year?

\$(FILL IN BOX, format with comma) per year [0-9,999,999]

Q82 What level of annual pay would have led you to accept this most attractive opportunity?

At least \$(FILL IN BOX, format with comma) per year [0-9,999,999. Must be >Q80]

Would not have accepted for any amount of pay offered

[PROG: IF CURRENTLY_EMPLOYED, GO TO CHECKPOINT:
HRS_CONDITIONAL_RETIREMENT]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: SEARCH_MODULE_2]

[NO PREVIOUS BUTTON HERE]

[PROG REPLACE SHORT_JOB = TRUE if PREVJOB_CAREER=TRUE & ((PREVJOB_YRSTOP-
PREVJOB_YRSTART <2) OR (PREVJOB_YRSTOP-PREVJOB_YRSTART=2 &
PREVJOB_MOSTART>PREVJOB_MOSTOP)]

[If Return_Group=="NEN", Go to Q84]

Q83 [IF SHORT_JOB, Display("On your last job"),ELSE Display("In the final 2 years of your last job")] or [within two years since](#) your last job ended, did you look for another employment situation?

[NOTE TO PROGRAMMER: allow option of selecting first two options].

Yes, work as an employee

Yes, self-employment

No [Skip to [Q83c](#)][PN: If Q83 is Blank, Skip to [Q83c](#)]

Q83a What were you looking for relative to your last job?

	Yes	No	Didn't matter
Different industry from last job			
Different occupation from last job			
More pay than last job			
Less commuting time than last job			
Less responsibility than last job			
More job security than last job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q83b How likely did you think it was that you would find any job opportunity that you would accept?

Answer: [VRI Scale]

[Skip to Q84]

Q83c We understand that you did not look for another job opportunity. Nonetheless, we are still interested in what characteristics you might have looked for had you looked for such an opportunity. What would you have looked for relative to your last job?

	Yes	No	Doesn't matter
Different industry from last job			
Different occupation from last job			
More pay than last job			
Less commuting time than last job			
Less responsibility than last job			
More job security than last job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q83d Suppose you had looked for another employment situation after leaving your last job. How likely do you think it was that you would have found any job opportunity that you would accept?

Answer: [VRI Scale]

Q84 [If Q83==Yes] Are you still looking? [If Q83==No or Blank or Return_Group=="NEN", Are you currently looking for an employment opportunity?]

Yes

No

[If No, Go TO Q85b]

Q85 What are you looking for relative to your last job?

	Yes	No	Doesn't matter
Different industry from last job			
Different occupation from last job			
More pay than last job			
Less commuting time than last job			
Less responsibility than last job			
More job security than last job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q85a Suppose you keep looking for another employment situation. How likely do you think it is, in a year, you would find any job opportunity that you would accept?

Answer: [VRI Scale]

[Go to Q86]

Q85b We understand that you are not looking for another job opportunity. Nonetheless, we are still interested in what characteristics you might look for if you were to look for such an opportunity. What would you look for relative to your last job?

	Yes	No	Doesn't matter
Different industry from last job			
Different occupation from last job			
More pay than last job			
Less commuting time than last job			
Less responsibility than last job			
More job security than last job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q85c Suppose you were to look for another employment situation. How likely do you think it is, in a year, you would find any job opportunity that you would accept?

Answer: [VRI Scale]

Q86 [IF SHORT_JOB, Display("On your last job"),ELSE Display("In the final 2 years of your last job")], did you ever have an employment opportunity—either one you sought or one that otherwise arose?

Yes

No

Q87 Since your last job ended, did you have an employment opportunity—either one you sought or one that otherwise arose?

Yes

No

[PN: If Q83==No or Blank, go to logic before Q90.]

Q88 Thinking about the process of finding an employment situation after your last job, how long did you expect to search?

[FILL IN BOX]weeks [0-999]

Q89 Thinking about the process of finding an employment situation after your last job, was it easier or harder to find than you had initially thought?

Easier

Harder

About what I expected

[If NO or Blank to Q86 AND Q87, PROCEED TO NEXT CHECK_POINT]

Q90 Please think about the most attractive such opportunity you had either [IF SHORT_JOB, Display("on your last job"),ELSE Display("in the final 2 years of your last job")] or after it ended. How does it differ compared to your last job? Please check all that apply. [Program as Multi-punch question]

Different industry from last job	
Different occupation from last job	
More pay than last job	
Less commuting time than last job	
Less responsibility than last job	
More job security than last job	
Better health insurance	
More flexible hours	
More flexible schedule (e.g., summers or winters off)	
More of my own boss	
Better work location	
Better coworkers	
Better boss	

Q91 Continuing to think about this most attractive opportunity, we are interested in why you decided NOT to accept it or pursue it. Please check all that apply.

Industry	
Occupation	
Pay	
Commuting time	
Responsibility	
Job security	
Health insurance	
Hours not flexible	
Schedule not flexible (no summers or winters off)	
Not my own boss	
Work location	
Coworkers	
Boss	

Q92 [If more than one is selected] Please check the main feature of the job that made you decide not to accept it.

[NOTE TO PROGRAMMER: List all selected from previous question]

Q93 Continuing to think about this most attractive opportunity, how much would it have paid per year?

\$(FILL IN BOX, format with comma) per year [0-9,999,999]

Q95 What level of annual pay would have led you to accept this most attractive opportunity?

At least \$(FILL IN BOX, format with comma) per year [0-9,999,999. Must be >Q93]

Would not have accepted for any amount of pay offered

[CHECK_POINT]

Q96 [Ask if (LOOKING=FALSE or NULL) & Q83~=Null]

[If Q83==Yes, "Why did you stop looking for another employment situation?"]

[If Q83==No, "Why did you choose not to look for another employment situation?"]

Please check all that apply.

My health

Family health

Other family/personal needs

Unable to find acceptable employment situation

Retired [Display option if Q83==No]

Other reason [FILL IN] [PN: Specify text is Non-Mandatory]

[PROG: GO TO CHECKPOINT: [ADDITIONAL MODULE](#)]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: SEARCH_MODULE_3]**[PN: Working on updating where to re-direct if need to correct answers]**

[NO PREVIOUS BUTTON HERE]

[If Return_Group=="WCNA" define JOBPREVIOUS = "last" and Go To Q99]

[If Return_Group=="WCWD" define JOBPREVIOUS="current" and Go To Q99]

[If Return_Group=="WBFW" or "NEW" define JOBPREVIOUS = "current" and Go To Q106]

[If Return_Group=="WBNA" or "NENA" define JOBPREVIOUS = "last" and Go To Q106]

DISPLAY SCREEN: You have told us about two jobs, your JOBPREVIOUS job and your longest or main job you have had since CAREER_AGE. We will call the latter job your **++career job++**. Here is what you told us about these two jobs.

[DISPLAY if JOBPREVIOUS="current"]

	Career Job	Current Job
Industry	INDUSTRY_CAREER	INDUSTRY_CURRENT
Occupation	OCCUPATION_CAREER	OCCUPATION_CURRENT
Started	CAREERJOB _MOSTART, CAREERJOB _YRSTART	CURRENTJOB_MOSTART, CURRENTJOB_YRSTART
Ended	CAREERJOB _MOSTOP, CAREERJOB _YRSTOP	-

[DISPLAY if JOBPREVIOUS="last"]

	Career Job	Last Job
Industry	INDUSTRY_CAREER	INDUSTRY_LAST
Occupation	OCCUPATION_CAREER	OCCUPATION_LAST
Started	CAREERJOB _MOSTART, CAREERJOB _YRSTART	LASTJOB_MOSTART, LASTJOB_YRSTART
Ended	CAREERJOB _MOSTOP, CAREERJOB _YRSTOP	LASTJOB_MOSTOP, LASTJOB_YRSTOP

Q97 If this is correct, continue to next page. [GO TO NEXT CHECK_POINT]

Yes, correct

No, not correct

[If Q97=No, Display “You have indicated that you would like to correct your job history. We will now bring you back to an earlier point in the survey so that you may make changes.]

[If CURRENTLY_EMPLOYED=YES, store Q18 to Q29 as Q18.old TO Q29.old, store Q52 to Q73 as Q52.old to Q73.old. Replace Q18 to Q73 with NULL. Also replace any intermediate variables created within these sections (e.g. *_CURRENT, *_CAREER, CURRENTJOB_*, CAREERJOB_*) with NULL. Skip to CHECKPOINT: CURRENT_JOB_BATTERY.]

[If CURRENTLY_EMPLOYED=NO & EVER_EMPLOYED=YES, store Q30 to Q73 as Q30.old to Q73.old. Replace Q30 to Q73 with NULL. Also replace any intermediate variables (e.g. *_LAST, *_CAREER, LASTJOB_*, CAREERJOB_*) created within these sections with NULL.) Skip to CHECKPOINT: LAST_JOB_BATTERY]

[CHECK_POINT]

[Hover text for ++career job++. “The career job is the longest or main job you have had since CAREER_AGE.”]

We are interested in your experiences looking for work after your ++career job++ ended. Specifically, we are interested in the experiences leading up to the first employment situation or job you had immediately after your career job.

Q99 About how long did it take you to find this first new employment situation after your career job ended? (If you found a new employment situation immediately, please enter 0).

[FILL IN BOX] weeks [Range: 0-999]

Q100 Had you started looking for a new employment situation while still employed at your career job?

Yes

No

Q101 [If YES] About how long before your career job ended had you started looking for a new employment situation?

[FILL IN BOX] weeks [Range: 0-999]

Q102 Thinking about the process of finding an employment situation after your career job, how long had you expected to take to find a new employment situation when you started looking?

[FILL IN BOX] weeks [Range: 0-999]

Not actively looking

[PN: respondents cannot choose this check-box & enter a number]

Q103 Thinking about the process of finding an employment situation after your career job, was it easier or harder to find than you had initially thought?

Easier

Harder

About what I expected

Q104 You just told us about finding an employment situation after your career job. Was the employment situation you found your **JOBPREVIOUS** job, or some previous job?

[Check boxes, only allow one box checked]

JOBPREVIOUS job

A previous job

[IF checked “**JOBPREVIOUS** job,” SKIP to next CHECK_POINT]

Q105 Now we want to ask about finding your **JOBPREVIOUS** employment situation. About how long did it take to find it from the end of your immediately preceding employment situation?

[FILL IN BOX] weeks [Range: 0-999]

Q106 Thinking about the process of finding your **JOBPREVIOUS** employment situation, how long had you expected to take to find a new employment situation when you started looking?

[FILL IN BOX] weeks [Range: 0--999]

Not actively looking

[PN: respondents cannot choose this check-box & enter a number]

Q107 Thinking about the process of finding your **JOBPREVIOUS** employment situation, was it easier or harder to find than you had initially thought?

Easier

Harder

About what I expected

[CHECK_POINT]

Q108 When considering or searching for your **JOBPREVIOUS** employment situation, what were you looking for compared to your **++career job++**?

	Yes	No	Didn't matter
Different industry from career job			
Different occupation from career job			
More pay than career job			
Less commuting time than career job			
Less responsibility than career job			
More job security than career job			
Better health insurance			
More flexible hours			
More flexible schedule (e.g., summers or winters off)			
More of my own boss			
Move to a better work location			
Better coworkers			
Better boss			

Q109 Please think about your actual JOBPREVIOUS employment situation. How does it differ compared to your ++career job++? Please check all that apply.

Different industry from career job	
Different occupation from career job	
More pay than career job	
Less commuting time than career job	
Less responsibility than career job	
More job security than career job	
Better health insurance	
More flexible hours	
More flexible schedule (e.g., summers or winters off)	
More of my own boss	
Better work location	
Better coworkers	
Better boss	

[IF CURRENTLY_EMPLOYED, GO TO CHECKPOINT: HRS_CONDITIONAL_RETIREMENT]

[IF CURRENTLY_EMPLOYED=FALSE, GO TO CHECKPOINT: [ADDITIONAL MODULE](#)]

DISPLAY ON NEW SCREEN

You are about to leave the current section of the survey. If you would like to revise any of the answers you submitted in this last section, please use the previous button below. Otherwise, please hit next to proceed to the next section. Once you hit next, you will not be able to return to the current section of the survey.

[PN: Previous Button should be on this screen]

[CHECKPOINT: HRS_CONDITIONAL_RETIREMENT]

[NO PREVIOUS BUTTON HERE]

[TABLES OF “FILL” VARIABLES FOR HRS_CONDITIONAL_RETIREMENT]

Self-rated health, Q111	Health fill 1	Health fill 2	Health fill 3	Health fill 4	Health fill 5
Excellent	worse	fair or poor	excellent	very good or good	fair or poor
Very good	worse	fair or poor	very good or excellent	good	fair or poor
Good, DK, RF	fair or poor	very good or excellent	very good or excellent	good	fair or poor
Fair	about the same or worse	very good or excellent	very good or excellent	good	fair or poor
Poor	about the same or worse	very good or excellent	very good or excellent	fair or good	poor

	Wealth fill 1	Wealth fill 2
All	\$600,000	\$1,000,000

Age	Age fill
AGE<62	62
64>=AGE>=62	65
Age>=65	70

[CHECKPOINT: HRS_CONDITIONAL_RETIREMENT]

[NO PREVIOUS BUTTON HERE]

[REMARK: This battery for currently working]

[REMARK: HRS_CONDITIONAL_RETIREMENT module was fielded in Survey 4 and HRS 2016, so important to keep wording synchronized.]

[NOTE: See end of module for “pre-fills”: age_fill, wealth_fill, and health_fill.

Age_fill: based on age asked at beginning of survey.

Wealth_fill: two values (~~option to have Michigan team provide different values for different wealth groups~~)

Health_fill: based on responses to Q111 in this module.]

****2-year work-health battery****

Next we would like to ask your opinion about how likely you think various events might be. Please give a number from 0 to 100 percent, where 0 means that you think there is absolutely no chance the event will happen, and 100 means that you think the event is absolutely sure to happen.

Q110 Please think about work in general and not just any work you may be doing now. What are the chances that you will be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q111 Would you say your health is excellent, very good, good, fair, or poor?

Excellent
Very good
Good
Fair
Poor

Q112 What are the chances that your health will be {Health fill 1} two years from now?

[fill in box]% [Allow 0-100]

Q113 And what are the chances that your health will be {*Health fill 2*} two years from now?

[fill in box]% [Allow 0-100]

Q114 If your health is {*Health fill 3*} two years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

Q115 And if your health is {*Health fill 4*} two years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

Q116 And if your health is {*Health fill 5*} two years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

~~[If no answer given in all of Q114, Q115 and Q116, skip to logic immediately before Q122.]~~
~~If Q114=0, Q115=0 and Q116=0, skip to logic immediately before Q122.]~~

****4-year work-health battery****

QXX4 Now please think about four years from now. Again, please think about work in general and not just any work you may be doing now. What are the chances that you will be working for pay four years from now?

[fill in box]% [Allow 0-100]

~~Q117 Now please think about four years from now.~~ What are the chances that your health will be {*Health fill 1*} four years from now?

[fill in box]% [Allow 0-100]

Q118 And what are the chances that your health will be {*Health fill 2*} four years from now?

[fill in box]% [Allow 0-100]

[If Q110=0 and QXX4=0, skip to logic immediately after Q121.]

Q119 If your health is {*Health fill 3*} four years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

Q120 And if your health is {*Health fill 4*} four years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

Q121 And if your health is {*Health fill 5*} four years from now, what are the chances that you will be working for pay?

[fill in box]% [Allow 0-100]

****2-year work-working conditions battery****

Now we will ask you about various combinations of your health status, offers of earnings and working conditions, and your decision to work.

When we ask about earnings and working conditions, we are referring to offers of employment that you might have regardless of whether or not you would choose to work. In the following questions, employment could come from any employer, including self-employment.

Q121a Think about two years from now. What are the chances employment would offer you the same or better earnings and working conditions as you have now?

[fill in box]% [Allow 0-100]

If Q121a<100, ask

Q121a2 Suppose you were in fact offered lower earnings.

How much lower would you expect those earnings to be relative to now?

[fill in box]% [Allow 1-100]

Q121b Suppose you were in fair or poor health two years from now.

What are the chances employment would offer you the same or better earnings and working conditions as you have now?

[fill in box]% [Allow 0-100]

If Q121b<100, ask

Q121b2 Suppose you were in fact offered lower earnings when in fair or poor health.

How much lower would you expect those earnings to be relative to now?

[fill in box]% [Allow 1-100]

[NOTES TO PROGRAMMER: PLEASE LAYOUT WITH INDENTATIONS AS SHOWN]

Q121c

Suppose that two years from now

you are in fair or poor health

and

employment offers you the same or better earnings and working conditions as you have now.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121d

Suppose that two years from now

you are in fair or poor health

and

employment offers you worse earnings and working conditions than ~~as~~ you have now.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121e

Suppose that two years from now

you are in excellent, very good, or good health

and

employment offers you the same or better earnings and working conditions as you have now.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121f

Suppose that two years from now

you are in excellent, very good, or good health

and

employment offers you worse earnings and working conditions than ~~as~~ you have now.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Now we will ask you about combinations of your health, your work schedule, and your decision to work.

When we ask about work schedule, we are referring to offers of employment that you might have regardless of whether or not you would choose to work. The opportunity to work could come from your current employment situation or a different one.

Q121g Think about two years from now. What are the chances employment would offer you the option to work half-time for half of your current earnings?

[fill in box]% [Allow 0-100]

Q121h Suppose you were in fair or poor health two years from now.

What are the chances employment would offer you the option to work half-time for half of your current earnings?

[fill in box]% [Allow 0-100]

[NOTES TO PROGRAMMER: PLEASE LAYOUT WITH INDENTATIONS AS SHOWN]

Q121i

Suppose that two years from now

you are in fair or poor health

and

employment offers the option to work half-time for half of your current earnings.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121j

Suppose that two years from now

you are in fair or poor health

and

employment does not offer you the option to work half-time for half of your current earnings.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121k

Suppose that two years from now

you are in excellent, very good, or good health

and

employment offers you the option to work half-time for half of your current earnings.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121l

Suppose that two years from now

you are in excellent, very good, or good health

and

employment does not offer you the option to work half-time for half of your current earnings.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

[IF CURRENT_SELF=YES skip to REASONS_FOR_SATE checkpoint]

Now we will ask you about various combinations of your health status, your current employer's business conditions, and your decision to work.

Q121m Think about two years from now. What are the chances that your current employer would be laying off 30 percent or more of its employees?

[fill in box]% [Allow 0-100]

[NOTES TO PROGRAMMER: PLEASE LAYOUT WITH INDENTATIONS AS SHOWN]

Q121n

Suppose that two years from now

you are in fair or poor health

and

your current employer is laying off 30 percent or more of its employees.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121o

Suppose that two years from now

you are in fair or poor health

and

your current employer is not laying off 30 percent or more of its employees.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121p

Suppose that two years from now

you are in excellent, very good, or good health

and

your current employer is laying off 30 percent or more of its employees.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

Q121q

Suppose that two years from now

you are in excellent, very good, or good health

and

your current employer is not laying off 30 percent or more of its employees.

What are the chances that you would be working for pay two years from now?

[fill in box]% [Allow 0-100]

[CHECKPOINT: REASONS_FOR_SATE]

****Reasons for SATE battery****

Q121r

Earlier we asked you about how your chances of working for pay in two years depend on your health. Now we would like to ask you how future health affects your opportunities and preferences.

For each of the statements below, please select whether you think the chances are lower, the same, or higher if you are in fair or poor health **versus** excellent, very good, or good health two years from now.

[Note to programmer: Allow to check at most one choice per row, Allow blank responses]

	If in fair/poor health instead of excellent/very good/good health (Check one for each row)		
Would you	Lower chance	Same chance	Higher chance
Be able to work?			
Be offered work?			
Want to work?			
Want to work part-time?			
Enjoy leisure activities?			
Be offered same pay as now?			
Work because need money?			
Work because need health insurance?			
Other[specify]			

Q121s

Are there any other factors related to health that affect whether you expect to work in two years?

[TEXT BOX]

****Wealth battery****

[If AGE \geq 70, SKIP NEXT TWO QUESTIONS]

Q122 Now please think about your situation today, including your current health and financial situation. Suppose you were to inherit { *Wealth fill 1* } from a distant relative within the next six months. Thinking about work in general and not just any work you may be doing now, what are the chances that you will be working full-time after you reach age { *Age fill* }?

[fill in box]% [Allow 0-100]

[If Q122=0 or BLANK, skip to end of module, proceed to CHECKPOINT: [ADDITIONAL MODULE](#)]

Q123 Now suppose you were to inherit { *Wealth fill 2* }. Thinking about work in general and not just any work you may be doing now, what are the chances that you will be working full-time after you reach age { *Age fill* }?

[fill in box]% [Allow 0-100]

[From CHECKPOINT SSQ_Preload to Q205 in Survey 4 is deleted.]

[BREAKPOINT ADDITIONAL MODULE]

[If Currently_Employed==No or Q10==NA , then go to Breakpoint: IES]

[Breakpoint: Exit planning]

[If Q10 == Never plan to retire, go to Q223]

Q222. At the beginning of the survey, you said you expect to completely retire at age ++Q10++. We would like to ask about what you expect your employment situation to be immediately before you completely retire.

Immediately before you completely retire, what is the percent chance of the following?

Be in same job as now [0-100]%

Work fewer hours than now [0-100]%

Work in a different occupation or industry than now [0-100]%

[Skip to Breakpoint: IES]

Q223. At the beginning of the survey, you said you expect to never completely retire. We would like to ask you about what you expect your last employment situation to be relative to now.

In your last employment situation, what is the percent chance of the following?

Be in same job as now [0-100]%

Work fewer hours than now [0-100]%

Work in a different occupation or industry than now [0-100]%

[PN: IF Returning==1 and Return_case ="NEN" or "NNN", do not show the following half-time break screen]

DISPLAY SCREEN – BREAK

You are a bit more than halfway through this survey. We realize you have committed a substantial amount of time at this point, so we ask that you please take the opportunity now to take a break, to perhaps stretch/get something to drink, and return in a few moments to complete the remainder of this survey. If it is safe to do so, please leave the browser window open. If the browser is left open for too long and your survey times out, simply click on the survey link contained in the email invitation that you received to resume from this point.

[Breakpoint: IES]

If Returning==0, Then

- **If Everemployed==0 Go to Breakpoint LTCL.**
- **If Currently_Employed==Yes, Then**
 - **Define IES=Current.**
- **If Currently_Employed==No s, Then**
 - **Define IES=Last.**

If Returning==1, Then:

- **If Return_Case==NNN, then Go to Breakpoint LTCL.**
- **If Return_Case==WCWS or WCWD or NEW or WBWS or WBWD or NNW, then:**
 - **Define IES=Current.**
- **If Return_Case ==WCN or NNNA or NEN or WCNA or WBNA or WBN or NENA, Then:**
 - **Define IES=Last.**

If (Returning==0 or Return_Case==WCWD or NEW or WBWD or NNW) and {(CURRENTJOB_YRSTART==2018) or ((CURRENTJOB_YRSTART==2017) and (CURRENTJOB_MOSTART>4))} then Define IES_tenure==Short.

If (Returning==0 or Return_Case==WCNA or WBNA or NENA or NNNA) and {(LASTJOB_YRSTART== LASTJOB_YRSTOP) or ((LASTJOB_YRSTART==LASTJOB_YRSTOP-1) and (LASTJOB_MOSTART>LASTJOB_MOSTOP))} then Define IES_tenure==Short.

**If Return_Case=WBN and {(d_CURRENTJOB_YRSTART== LASTJOB_YRSTOP) or
((d_CURRENTJOB_YRSTART==LASTJOB_YRSTOP-1) and
(d_CURRENTJOB_MOSTART>LASTJOB_MOSTOP))} then Define IES_tenure==Short.**

**If Return_Case=NEN and {(d_LASTJOB_YRSTART== d_LASTJOB_YRSTOP) or
((d_LASTJOB_YRSTART==d_LASTJOB_YRSTOP-1) and
(d_LASTJOB_MOSTART>d_LASTJOB_MOSTOP))} then Define IES_tenure==Short.**

QUESTION 1

[begin FRAME]

In the following questions, we will offer you different combinations of working hours and annual earnings. In particular, we are interested in learning how you value different work schedules.

[If IES==Current] In this section of the survey, we want to take you back to **one year ago**.

[If IES==Last] In this section of the survey, we want to take you back to **when you had one year left on your last job**.

-[no paragraph change] We will ask you to consider different combinations of working hours and annual earnings **for [If IES==Current, “the last year”] [If IES==Last “that last year of work”]**. These are work options that may not have been available to you. We will ask you to specify what you would have chosen had these options been available to you.

Please imagine the following as you make these choices.

1. Aside from hours and earnings, nothing changes including Social Security, private pensions, and health insurance.
2. Please choose as you believe you would have based on **what you knew and wanted in IF CURRENT[the last year]ELSE[your last year on the job]**.

Suppose that you were given a choice between two options [If IES==Current: **one year ago**] [If IES==Last: when you had **one year left** on your last job]

- **Option A** - work the same number of hours for the same total annual earnings as you had in that year.

- **Option B** - work **20%** fewer hours and receive **20%** less in total annual earnings.

For **both** Options:

- Nothing else will be affected by your choice during or after this year. Please imagine that other than hours and earnings, all aspects of your job—including Social Security, private pensions, and health insurance—would be exactly the same under the two options.

- You have to decide your work schedule at the beginning of the year. You are not allowed to change your work schedule until the end of the year.

[IF IES==Current]{

- At the end of this year your work options will be exactly the same regardless of your choice. You could retire, look for a new job, or continue working after choosing both Options. }

If you choose **Option B**:

- You can reduce work by **20%** this year by reducing your hours per day, days per week, or weeks per year.

- When you reduce the number of hours by 20%, your workload will also be reduced by 20%. We understand that it might be hard to imagine such a situation under the actual circumstance you had, but we ask you to try your best.

[IF IES_tenure==short] We understand that you worked less than one year on this job so it is hard to imagine the situations assumed in this scenario. In the following three questions, please do your best to imagine what you would have done had you worked at least one year on this job.

[Comprehension test questions]

It is important for research purposes to verify your understanding of the hypothetical situation and the hypothetical choice that we are asking you to consider. To that end we will ask a series of questions. At the end we will give you the correct information for any questions which you did not answer correctly just to make sure that everything is clear.

[Repeat max of two times. If get all correct the first time, then go to [Q225]. If missed any, repeat those questions.]

[NO PREVIOUS BUTTON during the comprehension test]

Q224_1. If you choose Option B, i.e., decide to work 20% fewer hours, your total annual earnings will be _____.

- a) the same as in Option A.
- b) 20% less than in Option A.

Correct answer (b): "If you choose to work 20% fewer hours, your total annual earnings will be 20% lower."

Q224_2. If you choose Option B, your Social Security and private pension benefits will be _____.

- a) the same as in Option A.
- b) 20% less than in Option A.

Correct answer (a): "Your choice between Option A and Option B does not affect anything other than the annual earnings. In particular, your Social Security, private pensions, and health insurance will be the same regardless of your choice."

Q224_3. When you make this choice, you should take into account what you have learned and how circumstances have changed since [If IES==Current: one year ago] [If IES==Last: when you had one year left on your last job]

a) Yes

b) No

Correct answer (b): "We want you to make your choice as you would have [If IES==Current: one year ago] [If IES==Last: when you had one year left on your last job] Nothing that you have learned since that time should be taken into account when you make your choice."

Q225

Suppose that you were given a choice between two options [If IES==Current: **one year ago**] [If IES==Last: when you had **one year left** on your last job]

- **Option A** - work the same number of hours for the same total annual earnings as you had in that year.

- **Option B** - work **20%** fewer hours and receive **20%** less in total annual earnings.

Which option would you choose?

- Option A

- Option B

[NEW SCREEN]

You have indicated that

[If option A]{you would rather work your actual number of hours than 20% fewer hours for 20% less in total annual earnings [IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job

We are now interested in the largest reduction in earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 20% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most** a {in bold, blue and larger font: [slider response]%} reduction in total annual earnings than what I would have earned if I had worked my actual number of hours.
- But I would not choose working 20% fewer hours for any further reductions in earnings. [Slider range: 0 – 19%]

[PN: If a respondent clicks a point on the bar & then does NOT move it, display the following message (this message is ONLY to be displayed on the first slider that a respondent sees): “We note that you did not take the opportunity to move the slider to change your choice. As you answer future questions of this type, you may find that experimenting with different positions of the slider helps you choose the best response for you.”

[Logic check: If slider response==0, then show the following message]

“Your response indicates that you would choose to work your actual number of hours even if that gives you almost the same total earnings as working 20% less hours. Is this correct?”

Yes

No

[If Yes, go back to the slider question]

[If option B]{You would rather work 20% fewer hours at a 20% lower annual earnings than your actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job}

We are now interested in the largest reduction in earnings associated with Option B for which you would still choose option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 20% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most** a {In bold, blue and larger font: [slider response]%} reduction in-total annual earnings than what I would have earned if I had worked my actual number of hours.
- But I would not choose working 20% fewer hours for any further reductions in earnings. [Slider range: 20 – 100%]

}

[PN: If a respondent clicks a point on the bar & then does NOT move it, display the following message (this message is ONLY to be displayed on the first slider that a respondent sees): “We note that you did not take the opportunity to move the slider to change your choice. As you answer future questions of this type, you may find that experimenting with different positions of the slider helps you choose the best response for you.”

Q225_a. If you were to choose Option B, how would you reduce the number of total working hours by 20%?

- Mainly by working fewer hours per day
- Mainly by working fewer days per week
- Mainly by working fewer weeks

[NEW SCREEN]

[IF IES==Current]{

We are now interested in your preference for work \BOLD{during the last year under different options.}

[IF IES==Last]{

We are now interested in your preference for work \BOLD{in the last year you worked prior to leaving your last job under different options.}

Suppose that you were given a choice between two options [If IES==Current: **one year ago**] [If IES==Last: when you had **one year left** on your last job]

- **Option A** - work the same number of hours for the same total annual earnings as you had in that year.

- **Option B** - work **30%** fewer hours and receive 30% less in total annual earnings.

For **both** Options:

- Nothing else will be affected by your choice during or after this year. Please imagine that other than hours and earnings, all aspects of your job—including Social Security, private pensions, and health insurance—would be exactly the same under the two options.

- You have to decide your work schedule at the beginning of the year. You are not allowed to change your work schedule until the end of the year.

[IF IES==Current]{

- At the end of this year your work options will be exactly the same regardless of your choice. You could retire, look for a new job, or continue working after choosing both Options. }

If you choose **Option B**:

- You can reduce work by **30%** this year by reducing your hours per day, days per week, or weeks per year.

- When you reduce the number of hours by 30%, your workload will also be reduced by 30%. We understand that it might be hard to imagine such a situation under the actual circumstance you had, but we ask you to try your best.

Q225_b

Which option would you choose?

- Option A

- Option B

[NEW SCREEN]

You have indicated that

[If option A]{you would rather work your actual number of hours than 30% fewer hours for 30% less in total annual earnings[IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job}

We are now interested in the largest reduction in earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 30% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most a** {In bold, blue and larger font: [slider response]%} reduction in total annual earnings than what I would have earned if I had worked my actual number of hours.
- But I would not choose working 30% fewer hours for any further reductions in earnings. [Slider range: 0 – 29%]

[Logic check: If slider response==0, then show the following message]

“Your response indicates that you would choose to work your actual number of hours even if that gives you almost the same total earnings as working 30% less hours. Is this correct?”

Yes

No

[If Yes, go back to the slider question]

[Logic check: if the slider response in this question is strictly less than that from the previous slider response, show the following:

You said you are willing to accept [previous slider response]% reduction in annual earnings if you work 20% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 30% fewer hours. Is this correct?

THIS APPLIES FOR ALL SLIDERS: [For blank responses, let’s not ask these follow-up questions]

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back to Q225_b.

]

[If option B]{You would rather work 30% fewer hours at a 30% lower annual earnings than your actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job}

We are now interested in the largest reduction in earnings associated with Option B for which you would still choose Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 30% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most** a {In bold, blue and larger font: [slider response]%} reduction in total annual earnings than what I would have earned if I had worked my actual number of hours.
- But I would not choose working 30% fewer hours for any further reductions in earnings. [Slider range: 30 – 100%]

}

[Logic check: if the slider response in this question is strictly less than that from the previous slider response, show the following:

You said you are willing to accept [previous slider response]% reduction in annual earnings if you work 20% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 30% fewer hours. Is this correct?

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back Q225_b

]

Q226_c. If you were to choose Option B, how would you reduce the number of total working hours by 30%?

- a) **Mainly by working fewer hours per day**
- b) **Mainly by working fewer days per week**
- c) **Mainly by working fewer weeks**

[NEW SCREEN]

[IF IES==Current]{

We are now interested in your preference for work **\BOLD{during the last year under different options.}**

[IF IES==Last]{

We are now interested in your preference for work **\BOLD{in the ~~the~~ last year you worked prior to leaving your last job under different options.}**

Suppose that you were given a choice between two options [If IES==Current: **one year ago**] [If IES==Last: when you had **one year left** on your last job]:

- **Option A** - work the same number of hours for the same total annual earnings as you had in that year.

- **Option B** - work **50%** fewer hours and receive **50%** less in total annual earnings.

For **both** Options:

- Nothing else will be affected by your choice during or after this year. Please imagine that other than hours and earnings, all aspects of your job—including Social Security, private pensions, and health insurance—would be exactly the same under the two options.

- You have to decide your work schedule at the beginning of the year. You are not allowed to change your work schedule until the end of the year.

[IF IES==Current]{

- At the end of this year your work options will be exactly the same regardless of your choice. You could retire, look for a new job, or continue working after choosing both Options. }

If you choose **Option B**:

- You can reduce work by **50%** this year by reducing your hours per day, days per week, or weeks per year.

- When you reduce the number of hours by 50%, your workload will also be reduced by 50%. We understand that it might be hard to imagine such a situation under the actual circumstance you had, but we ask you to try your best.

Q226

Which option would you choose?

- Option A

- Option B

[NEW SCREEN]

You have indicated that

[If option A]{you would rather work your actual number of hours than 50% fewer hours for 50% less in total annual earnings[IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job}

We are now interested in the largest reduction in earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 50% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most a** {In bold, blue and larger font: [slider response]%} reduction in total annual earnings than what I would have earned if I had worked my actual number of hours.

But I would not choose working 50% fewer hours for any further reductions in earnings.

[Slider range: 0 – 49%]

[Logic check: If slider response==0, then show the following message]

“Your response indicates that you would choose to work your actual number of hours even if that gives you almost the same total earnings as working 50% less hours. Is this correct?”

Yes

No

[If Yes, go back to the slider question]

[Logic check: if the slider response in this question is strictly less than that from the first slider response, show the following:

You said you are willing to accept [first slider response]% reduction in annual earnings if you work 20% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 50% fewer hours. Is this correct?

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back Q226

[Logic check: if the slider response in this question is strictly less than that from the second slider response, show the following:

You said you are willing to accept [second slider response]% reduction in annual earnings if you work 30% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 50% fewer hours. Is this correct?

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back Q226]

[If option B]{You would rather work 50% fewer hours at a 50% lower annual earnings than your actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year you worked prior to leaving your last job}

We are now interested in the largest reduction in earnings associated with Option B for which you would still choose Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent reduction in earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]]

- I would prefer working 50% fewer hours to working my actual number of hours [IF IES==Current]{during the last year} [If IES==Last]{during the last year I worked prior to leaving my last job} if that came with **at most a** {In bold, blue and larger font: [slider response]%} reduction in total annual earnings than what I would have earned if I had worked my actual number of hours.
- But I would not choose working 50% fewer hours for any further reductions in earnings.-

[Slider range: 50 – 100%]

}

[Logic check: if the slider response in this question is strictly less than that from the first slider response, show the following:

You said you are willing to accept [first slider response]% reduction in annual earnings if you work 20% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 50% fewer hours. Is this correct?

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back to Q226.]

[Logic check: if the slider response in this question is strictly less than that from the second slider response, show the following:

You said you are willing to accept [second slider response]% reduction in annual earnings if you work 30% fewer hours but are not willing to accept more than [current slider response]% reduction in annual earnings if you work 50% fewer hours. Is this correct?

Yes, that is correct.

No, I would like to modify my answer.

If No is selected, go back Q226

]

Q226_a. If you were to choose Option B, how would you reduce the number of total working hours by 50%?

- Mainly by working fewer hours per day
- Mainly by working fewer days per week
- Mainly by working fewer weeks

QUESTION 2

[NEW SCREEN]

We are now interested in a different type of tradeoff regarding time spent working.

[IF IES==Current & Q10 ~= Never plan to retire]{

Note that the following questions concern different timing than the previous questions. Suppose it is one year before you completely retire and you are presented with the following options:}

[IF IES==Current & Q10 == Never plan to retire]{

Note that the following questions concern different timing than the previous questions. We understand that you do not plan to completely retire. Nonetheless, suppose you change your mind and consider retirement at some point in your life. Further suppose that it is one year before you completely retire and you are presented with the following options:}

[IF IES==Last]{

Suppose **in the the last year you worked prior to leaving your last job** you were presented with the following options:

- **Option A** – {[If IES==Current] work the same number of hours as you currently do [If IES==Last] work the same number of hours as the last year you worked}for the next year and then retire.

- **Option B** - work **50%** fewer hours for **50%** lower earnings for the next 2 years, hence extending your working life by 1 year, and then retire.

Your **total** earnings will be the same between Option A and Option B.

There are important things to bear in mind when making these choices.

- For **both** Options:
 - Nothing else will be affected by your choice during or after this year. Please imagine that other than hours and earnings, all aspects of your job—including Social Security, private pensions, and health insurance—would be exactly the same under the two options.
 - You have to decide your work schedule at the beginning of each year. You are not allowed to change your work schedule until the end of the year.
- If you choose **Option B**:
 - You can reduce work by **50%** each year by reducing your hours per day, days per week, or weeks per year.

- When you reduce the number of hours by 50%, your workload will also be reduced by 50%. We understand that it might be hard to imagine such a situation under the actual circumstance you had, but we ask you to try your best.
-
- [If IES==Last] Please choose as you believe you would have based on what you knew and wanted in your last year on the job.
- [IF IES==Last & IES_tenure==short] Again, we understand that you worked less than one year on this job so it is hard to imagine the situations assumed in this scenario. In the following three questions, please do your best to imagine what you would have done had you worked at least one year on this job.

Q227

Which option would you choose?

- Option A

- Option B

You have indicated that

[If option A]{you would rather work {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} for the next year and then retire than working 50% fewer hours for the next 2 years, hence extending your working life by one year.

We are now interested in the smallest increase in total earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the smallest percent increase in total earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 50% fewer hours for the next two years to working { [If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked } for one year if what I earn in those two years is **at least** {In bold, blue and larger font: [slider response]%} more than what I would have earned if I had worked the the same number of hours for one year.
- But I would not choose working 50% fewer hours for the next two years for any less increases in earnings.-[Slider range: 0 – 100%]

[If option B]{you would rather work 50% fewer hours for two years, hence extending your working life by one year, than working { [If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked }for the next year and then retire.

We are now interested in the largest decrease in total earnings associated with Option B at which you would still choose Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent decrease in total earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 50% fewer hours for the next two years to working { [If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked }for one year if what I earn in those two years is **at most** {In bold, blue and larger font: [slider response]%} less than what I would have earned if I had worked the same number of hours for one year.
- But I would not choose working 50% fewer hours for the next two years for any further reductions in earnings. [Slider range: 0 – 100%]

[NEW SCREEN]

Suppose you are given the same choice again, but with slightly different options

- **Option A** - work { [If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked }for the next year and then retire.

- **Option B** - work 75% fewer hours for 75% lower earnings for the next 4 years, hence extending your working life by 3 years, and then retire.

Your total earnings will be the same between Option A and Option B.

Q228

Which option would you choose?

- Option A

- Option B

You have indicated that

[If option A]{you would rather work { [If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked }for the next year and then retire than working 75% fewer hours for the next 4 years, hence extending your working life by 3 years.

We are now interested in the smallest increase in total earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the smallest percent

increase in total earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 75% fewer hours for the next four years to working {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} for one year if what I earn in those four years is **at least** {In bold, blue and larger font: [slider response]%} more than what I would have earned if I had worked the same number of hours for one year.
- But I would not choose working 75% fewer hours for the next four years for any less increases in earnings. -[Slider range: 0 – 100%]

[If option B]{you would rather work 75% fewer hours for the next 4 years, hence extending your working life by 3 years, than working {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked}for the next year and then retire.

We are now interested in the largest decrease in total earnings associated with Option B at which you would still choose Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent decrease in total earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 75% fewer hours for the next four years to working {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} for one year if what I earn in those four years is **at most** {In bold, blue and larger font: [slider response]%} less than what I would have earned if I had worked the same number of hours for one year.
- But I would not choose working 75% fewer hours for the next four years for any further reductions in earnings. -[Slider range: 0 – 100%]

[NEW SCREEN]

Suppose you are given the same choice again, but with slightly different options

- **Option A - work** {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} **for the next year and then retire.**

- **Option B - work 20% more hours for 20% higher earnings for the next 10 months, hence shortening your working life by 2 months, and then retire.**

Your total earnings will be the same between Option A and Option B.

Q229

Which option would you choose?

- Option A

- Option B

You have indicated that

[If option A]{you would rather work {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} **for the next year and then retire than working 20% more hours for the next 10 months, hence shortening your working life by 2 months.**

We are now interested in the smallest increase in total earnings associated with Option B at which you would switch to Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the smallest percent increase in total earnings associated with Option B at which you would switch to Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 20% more hours for the next 10 months to working {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} **for one year** if what I earn in those 10 months is **at least** {In bold, blue and larger font: [slider response]%} **more than what I would have earned if I had worked the same number of hours for one year.**

But I would not choose working 20% more hours for the next 10 months for any less increases in earnings. [Slider range: 0 – 100%]

[If option B]{you would rather work 20% more hours for the next 10 months, hence shortening your working life by 2 months, than working {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} **for the next year and then retire.**

We are now interested in the largest decrease in total earnings associated with Option B at which you would still choose Option B. Please make your choice using the slider below. To make your choice, click on the bar below. Move the slider to the left or right until it reflects the largest percent decrease

in total earnings associated with Option B at which you would still choose Option B. The text at the bottom of the screen will change as you move the slider to remind you what your choice means. When you are happy with your choice, hit next.

[SLIDER] [DISPLAY TEXT]

- I would prefer working 20% more hours for the next 10 months to working the {[If IES==Current] the same number of hours as you currently do [If IES==Last] the same number of hours as the last year you worked} for one year if what I earn in those 8 months is **at most** {In bold, blue and larger font: [slider response]%} less than what I would had if I had worked the same number of hours for one year.
- But I would not choose working 20% more hours for the next 10 months for any further reductions in earnings. -[Slider range: 0 – 100%]

[No Q230 – Q236]

[Breakpoint LTCI]

The next questions ask about private long-term care insurance that you may have voluntarily purchased for yourself [PROG IF QM=YES, DISPLAY “or your SPOUSE”]. Long-term care insurance typically offers reimbursement for expenses on qualified long-term care expenses in a nursing home and/or in the home. Here we are interested only in private long-term care insurance that you may have elected to purchase, not any private or public plans in which you are automatically enrolled. If you are unsure about any information, please provide your best estimate and answer as accurately as you can. If consulting records or online resources would help you respond, please do so.

[Previous button ON once INSIDE this section]

Q237. Do [PROG IF QM=YES, DISPLAY “either”] you [PROG IF QM=YES, DISPLAY or your SPOUSE] have private long-term care insurance?

Please select one.

Yes, [PROG IF QM=YES, DISPLAY “my SPOUSE and/or”] I have long-term care coverage.
No, [PROG IF QM=YES, DISPLAY “neither my SPOUSE nor”] I [PROG IF QM=No, DISPLAY “do not”] have long-term care coverage.

[If No or blank, Skip to Breakpoint ADL update]

[If QM=No and Q237=Yes, Skip to Q239a]

Q238. Please select all the policies that your household has.

An individual policy for myself

An individual policy for my SPOUSE

A joint policy that covers both my SPOUSE and me

[PROG: LTCL_SELF=YES if the first one is chosen. LTCL_SPOUSE=YES if the second one is chosen. LTCL_SHARED=YES if the third one is chosen.]

[PROG: SKIP to the logic immediately before Q240a if QM=YES and LTCL_SELF~=YES]

Q239a. Did you buy [PROG IF QM=NO, DISPLAY “this plan”, If QM=YES, DISPLAY “the individual plan that covers yourself”] individually or through your employer?

[PROG IF QM=YES & LTCL_SPOUSE=YES & LTCL_SHARED=YES, DISPLAY “We are interested in your individual policy only. We will ask about your SPOUSE’s individual policy and your joint policy in the next set of questions.”]

[PROG IF QM=YES & LTCL_SPOUSE=YES & LTCL_SHARED=NO, DISPLAY “We are interested in your individual policy only. We will ask about your SPOUSE’s individual policy in the next set of questions.”]

[PROG IF QM=YES & LTCL_SPOUSE=NO & LTCL_SHARED=YES, DISPLAY “We are interested in your individual policy only. We will ask about your joint policy in the next set of questions.”]

If you have more than one such policy, please report the most important one in the following questions.

Individually

Through employer

Q239b. Is this a stand-alone policy for long-term care or a combination policy including life insurance?

Stand-alone policy

Combination policy including life insurance

Q239c. Does [PROG IF QM=NO, DISPLAY “this plan”, If QM=YES, DISPLAY “the individual plan that covers yourself”] cover care in a nursing home facility only, personal or long-term care at home, or both in-home and nursing home care?

Please select one.

Nursing home only-

In-home care only-

Both nursing home and in-home care-

Q239d. Does this plan increase payment with inflation?

Yes

No

[Skip to the log immediately before Q239f if “In-home care only” is chosen in Q239c]

Q239e. Is there a maximum benefit for nursing-home care coverage in any of the following forms? Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q239e] Q239e_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q239e] Q239e_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q239e] Q239e_3. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

[Skip to Q239g if “Nursing home only” is chosen in Q239c]

Q239f. Is there a maximum benefit for in-home care coverage in any of the following forms? Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q239f] Q239f_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q239f] Q239f_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q239f] Q239f_3. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

Q239g. About how much does your household pay for this plan? Your answer can be in terms of payment per year or lump-sum payment.

\$[] per year [1 to 1,000,000]

\$[] in lump-sum [1 to 10,000,000]

Q239h. What year did you first pay premium on this policy?

INSERT DROP DOWN MENU SHOWING AS CHOICES: BEFORE 1980; SINGLE YEARS FOR 1980 THRU 2018.

Q239i. Has the premium of this policy increased significantly since you paid premium for the first time?

Yes

No

Q239j. Did you ever have a policy covering yourself for which you lost coverage or that you lapsed?

Yes

No

[If Yes to Q239j] Q239k. For the policy you lost coverage or lapsed, for how many years did you pay premium?

[] years [range 1-100]

[PROG: SKIP to Breakpoint ADL update if QM=NO]

[PROG: SKIP to the logic immediately before Q241a if QM=YES and LTCL_SPOUSE~=YES]

Q240a. Did you buy the individual plan that covers your SPOUSE individually or through your employer?

[PROG IF QM=YES & LTCL_SHARED=YES, DISPLAY "We are interested in your SPOUSE's individual policy only. We will ask about your joint policy in the next set of questions."]

If you have more than one such policy, please report the most important one in the following questions.

Individually

Through employer

Q240b. Is this a stand-alone policy for long-term care or a combination policy including life insurance?

Stand-alone policy

Combination policy including life insurance

Q240c. Does [PROG IF QM=NO, DISPLAY “this plan”, If QM=YES, DISPLAY “the individual plan that covers your SPOUSE”] cover care in a nursing home facility only, personal or long-term care at home, or both in-home and nursing home care?

Please select one.

Nursing home only-

In-home care only-

Both nursing home and in-home care-

Q240d. Does this plan increase payment with inflation?

Yes

No

[Skip to the log immediately before Q240f if “In-home care only” is chosen in Q240c]

Q240e. Is there a maximum benefit for nursing-home care coverage in any of the following forms?

Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q240e] Q240e_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q240e] Q240e_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q240e] Q240e_3. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

[Skip to Q240g if “Nursing home only” is chosen in Q240c]

Q240f. Is there a maximum benefit for in-home care coverage in any of the following forms? Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q240f] Q240f_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q240f] Q240f_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q240f] Q240f_2. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

Q240g. About how much does your household pay for this plan?

Your answer can be in terms of payment per year or lump-sum payment.

[\$ [] per year [1 to 1,000,000]

[\$ [] in lump-sum [1 to 10,000,000]

Q240h. What year did you first pay premium on this policy?

INSERT DROP DOWN MENU SHOWING AS CHOICES: BEFORE 1980; SINGLE YEARS FOR 1980 THRU 2018.

Q240i. Has the premium of this policy increased significantly since you paid premium for the first time?

Yes

No

Q240j. Did you ever have a policy covering your SPOUSE for which you lost coverage or that you lapsed?

Yes

No

[If Yes to Q240j]

Q240k. For the policy you lost coverage or lapsed, for how many years did you pay premium?

[] years [range 1-100]

[PROG: SKIP to Breakpoint ADL update if QM=YES and LTCL_SHARED~=YES]

Q241a. Did you buy the individual plan that jointly covers you and your SPOUSE individually or through your employer?

If you have more than one such policy, please report the most important one in the following questions.

Individually

Through employer

Q241b. Is this a stand-alone policy for long-term care or a combination policy including life insurance?

Stand-alone policy

Combination policy including life insurance

Q241c. Does [PROG IF QM=NO, DISPLAY “this plan”, If QM=YES, DISPLAY “the individual plan that jointly covers you and your SPOUSE”] cover care in a nursing home facility only, personal or long-term care at home, or both in-home and nursing home care?

Please select one.

Nursing home only:

In-home care only:

Both nursing home and in-home care:

Q241d. Does this plan increase payment with inflation?

Yes

No

[Skip to the log immediately before Q241f if “In-home care only” is chosen in Q241c]

Q241e. Is there a maximum benefit for nursing-home care coverage in any of the following forms?
Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q241e] Q241e_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q241e] Q241e_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q241e] Q241e_3. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

[Skip to Q241g if “Nursing home only” is chosen in Q241c]

Q241f. Is there a maximum benefit for in-home care coverage in any of the following forms? Please choose all that apply.

Maximum dollar amount per day

Maximum number of days per year

Maximum number of years for lifetime

None

[If the first option is chosen in Q241f] Q241f_1. What is the maximum benefit per day?

[] dollars per day [Range: 1 to 1,000,000]

[If the second option is chosen in Q241f] Q241f_2. What is the maximum number of days per year?

[] days per year [Range: 1 to 365]

[If the third option is chosen in Q241f] Q241f_3. What is the maximum number of years for lifetime?

[] years [Range 1 to 100]

Q241g. About how much does your household pay for this plan? Your answer can be in terms of payment per year or lump-sum payment.

[\$[] per year [1 to 1,000,000]

[\$[] in lump-sum [1 to 10,000,000]

Q241h. What year did you first pay premium on this policy?

INSERT DROP DOWN MENU SHOWING AS CHOICES: BEFORE 1980; SINGLE YEARS FOR 1980 THRU 2018.

Q241i. Has the premium of this policy increased significantly since you paid premium for the first time?

Yes

No

Q241j. Did you ever have a policy covering you and your SPOUSE jointly for which you lost coverage or that you lapsed?

Yes

No

[If Yes to Q241j] Q241k. For the policy you lost coverage or lapsed, for how many years did you pay premium?

[] years [range 1-100]

[Breakpoint ADL Update]

We now will ask questions about the need for help with activities such as eating, dressing, bathing, toileting, walking across a room, and getting in or out of bed. We call these activities of daily living (ADLs).

[PN: If QM=Yes, then display "We will ask questions about yourself first. We will ask questions about your SPOUSE after that."]

Q242. Do you currently need help with the activities of daily living (ADLs)?

Yes

No

Q242a. [If 242==Yes] With which activities of daily living (ADLs) do you need help?

Eating

Dressing

Bathing

Toileting

Walking across a room

Getting in or out of bed

Q242b. [If Eating==Yes] Who helps you with {bold: eating}? Please select all that apply.

~~IF~~ QM==Yes-SPOUSE

Children

Grandchildren

Paid professionals

Others [Speicify]

Q242c. [If Eating==Yes & Yes to any of Q242b] For how many hours does each person help you with **eating** each week?

[PROG: Show only the options that are selected in Q242b. For responses, allow integer from 1 to 150]

[If QM==Yes] SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q242d. [If Dressing==Yes] Who helps you with **dress**ing? Please select all that apply.

[If M==Yes] SPOUSE

Children

Grandchildren

Paid professionals

Others [Speicify]

Q242e. [If dressing ==Yes & Yes to any of Q242d] For how many hours does each person help you with **{bold: dressing}** each week?

[PROG: Show only the options that are selected in Q242d. For responses, allow integer from 1 to 150]

[IfQM==Yes]SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q242f. [If Bathing==Yes] Who helps you with **{bold: bathing}**? Please select all that apply.

[IfQM==Yes]SPOUSE

Children

Grandchildren

Paid professionals

Others [Speicify]

Q242g. [If Bathing==Yes & Yes to any of Q242f] For how many hours does each person help you with **{bold: bathing}** each week?

[PROG: Show only the options that are selected in Q242f. For responses, allow integer from 1 to 150]

[If QM==Yes] SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q242h. [If Toileting==Yes] Who helps you with **{bold: toileting}**? Please select all that apply.

[IfQM==Yes]SPOUSE

Children

Grandchildren

Paid professionals

Others [Speicify]

Q242i. [If Toileting==Yes & Yes to any of Q242h] For how many hours does each person help you with **{bold: toileting}** each week?

[PROG: Show only the options that are selected in Q242h. For responses, allow integer from 1 to 150]

[IfQM==Yes]SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q242j. [If Walking across a room==Yes] Who helps you with **{bold: walking across a room}**? Please select all that apply.

[IfQM==Yes]SPOUSE

Children

Grandchildren

Paid professionals

Others [Speicify]

Q242k. [If Walking across a room==Yes & Yes to any of Q242j] For how many hours does each person help you with **walking across a room** each week?

[PROG: Show only the options that are selected in Q242j. For responses, allow integer from 1 to 150]

[IQM==Yes]SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q242l. [If Getting in or out of bed==Yes] Who helps you with **getting in or out of bed**? Please select all that apply.

[IfQM==Yes]SPOUSE

Children

Grandchildren

Paid professionals

Others [Specify]

Q242m. [If Getting in or out of bed==Yes & Yes to any of Q242l] For how many hours does each person help you with **getting in or out of bed** each week?

[PROG: Show only the options that are selected in Q242l. For responses, allow integer from 1 to 150]

[IfQM==Yes] SPOUSE	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

[If Yes to any option in Q242a] Q242n. Do you receive these types of help in a facility including a nursing home or in your own home?

In a facility

In own home

[If Yes to any option in Q242a] Q242o. Does your household pay out of pocket for any of these types of help?

Yes

No

[If Yes to Q242o] Q242p. How much does your household pay for each person that helps you?

[PROG: Show only the options that are ever selected in Q242b, Q242d, Q242f, Q242h, Q242j, and Q242l. Do not include spouse.]

	Paid to help you	Amount paid	Payment frequency
Children	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Grandchildren	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Paid professionals	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Others [Speicify]	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]

Q243. [If QM==Yes] Does your SPOUSE currently need help with the activities of daily living (ADLs)?

Yes

No

Q243a. [If Q243==Yes] With which activities of daily living (ADLs) does your SPOUSE need help?

Eating

Dressing

Bathing

Toileting

Walking across a room

Getting in or out of bed

Q243b. [If Eating==Yes] Who helps your SPOUSE with {bold: eating}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243c. [If Eating==Yes & Yes to any of Q243b] For how many hours does each person help your SPOUSE with {bold: eating} each week?

[PROG: Show only the options that are selected in Q243b. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q243d. [If Dressing==Yes] Who helps your SPOUSE with {bold: dressing}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243e. [If dressing ==Yes & Yes to any of Q243c] For how many hours does each person help your SPOUSE with {bold: dressing} each week?

[PROG: Show only the options that are selected in Q243e. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q243f. [If Bathing==Yes] Who helps your SPOUSE with {bold: bathing}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243g. [If Bathing==Yes & Yes to any of Q243f] For how many hours does each person help your SPOUSE with {bold: bathing} each week?

[PROG: Show only the options that are selected in Q243f. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q243h. [If Toileting==Yes] Who helps your SPOUSE with {bold: toileting}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243i. [If Toileting==Yes & Yes to any of Q243h] For how many hours does each person help your SPOUSE with {bold: toileting} each week?

[PROG: Show only the options that are selected in Q243h. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q243j. [If Walking across a room==Yes] Who helps your SPOUSE with {bold: walking across a room}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243k. [If Walking across a room==Yes & Yes to any of Q243j] For how many hours does each person help your SPOUSE with {bold: walking across a room} each week?

[PROG: Show only the options that are selected in Q243j. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

Q243l. [If Getting in or out of bed==Yes] Who helps your SPOUSE with {bold: getting in or out of bed}? Please select all that apply.

Yourself

Children

Grandchildren

Paid professionals

Others [Speicify]

Q243m. [If Getting in or out of bed==Yes & Yes to any of Q243l] For how many hours does each person help your SPOUSE with {bold: getting in or out of bed} each week?

[PROG: Show only the options that are selected in Q243l. For responses, allow integer from 1 to 150]

Yourself	
Children	
Grandchildren	
Paid professionals	
Others [Speicify]	

[If Yes to any option in Q243a] Q243n. Does your SPOUSE receive these types of help in a facility including a nursing home or in your own home?

In a facility

In own home

[If Yes to any option in Q243a] Q243o. Does your household pay out of pocket for any of these types of help?

Yes

No

[If Yes to Q243o] Q243p. How much does your household pay for each person that helps your SPOUSE?

[PROG: Show only the options that are ever selected in Q243b, Q243d, Q243f, Q243h, Q243j, and Q243l. Do not include Yourself.]

	Paid to help your SPOUSE	Amount paid	Payment frequency
Children	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Grandchildren	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Paid professionals	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]
Others [Speicify]	Yes/No	[Activate if “Yes” chosen in the left column] [Range: 1 – 1,000,000]	[Drop down: “per day”, “per week”, “per month”]

Q244. What is the percent chance that you will ever need help [If Q242=Yes, display “, or will continue to need help,” with the activities of daily living (ADLs) for at least 1 year?

[VRI Probability scale]

[If Q244>0 or blank, ask Q245. Otherwise skip to logic immediately before Q246.

Q245. What is the percent chance that you will ever need help [If Q242=Yes, display “, or will continue to need help,” with the activities of daily living (ADLs) for at least 3 years?

[VRI Probability scale]

[If Q245>Q244, then error message: “Please enter a response less than or equal to Q244.]

[PN: If Q244 is blank, allow any value at Q245 without showing error message.

[If QM=No then Go to Breakpoint Family Care Giving]

Q246. What is the percent chance that your SPOUSE will ever need help [If Q243=Yes, display “, or will continue to need help,” with the activities of daily living (ADLs) for at least 1 year?

[VRI Probability scale]

[If Q246>0 or blank, ask Q247. Otherwise skip to Breakpoint Family Care Giving.

Q247. What is the percent chance that your SPOUSE will ever need help [If Q243=Yes, display “, or will continue to need help,” with the activities of daily living (ADLs) for at least 3 years?

[VRI Probability scale]

[If Q247>Q246, then error message: “Please enter a response less than or equal to Q246.]

[Breakpoint: Family Care Giving]

Q248. Do you currently help any of your [If QM==Yes, display “, and your SPOUSE’s”] parents with the activities of daily living (ADLs)?

Yes

No, [If QM==Yes display “my SPOUSE and”] I do not have a living parent.

No, [If QM==Yes, display “my SPOUSE and”] I do have a living parent but I do not help with the ADLs.

-[If Q248 = Yes] Q250. How much time do you spend on helping your [If QM==Yes, display “or your SPOUSE’s”] parents with the activities of daily living (ADL’s) ~~taking care of your family?~~ Your answer can be in terms of hours per day, days per week, days per year, or any of these combinations.

_____ hours per week. [range 1-168]

_____ days per week [1-7]

_____ days per year [1-365]

[If QM=No, then GO TO BREAKPOINT END SURVEY]

[If Q248 == No, My SPOUSE and I do not have a living parent, then GO TO BREAKPOINT END SURVEY]

Q251. Does your SPOUSE currently help any of your and your SPOUSE's parents, with the activities of daily living (ADLs)?

Yes

No, [If QM==Yes, display "my SPOUSE and"] I do have a living parent but my SPOUSE does not help with the ADLs.

-[If Q251 = Yes] Q253. How much time does your SPOUSE spend on helping ~~taking care of~~ your [If QM==Yes, display "or your SPOUSE's"] parents with the activities of daily living (ADLs) ~~family~~? Your answer can be in terms of hours per day, days per week, days per year, or any of these combinations.

_____ hours per week. [range 1-168]

_____ days per week [1-7]

_____ days per year [1-365]

BREAKPOINT END SURVEY
[NO PREVIOUS BUTTON HERE]

Q254 [If Returning==1] Thank you for completing this survey. In addition to this survey, which other Vanguard Research Initiative survey(s) did you ++personally++ complete? Select all that apply

- Survey 1 (August 2013)
- Survey 2 (January 2014)
- Survey 3 (August 2014)
- Survey 4 (October 2015)
- Survey 5 (August 2016)
- Do not remember

[If Returning==0] Thank you for completing this survey. In addition to this survey, did you ++personally++ complete the previous survey on household wealth in October 2015?

- Yes
- No
- Do not remember

[PROG: MARK AS A COMPLETE HERE]

[CLOSING SCREEN. MARK RESPONDENT AS COMPLETE WHEN THEY ANSWER THE QUESTION PRIOR TO REACHING THIS SCREEN.]

Thank you for completing the Vanguard Research Initiative.

Your participation in the surveys of Vanguard Research Initiative has provided valuable insight. Together with our academic partners at the University of Michigan and New York University, we will be preparing research papers aimed at better understanding how individuals and their families prepare for retirement and address the challenges they face as they age. This research aims to inform public policy and point toward improvements in financial options available to older Americans.

[RESUME TEXT DISPLAY FOR ALL]

Thank you very much for your responses throughout this project.

We are considering continuation of the Vanguard Research Initiative in the future. If we do so, at that time we will provide additional information about the next round of surveys, and also offer a new incentive for your continued participation.

In between survey periods, we will be happy to send you periodic updates on the research or other information as part of the Vanguard Research Initiative. None of the materials that you receive will be marketing materials – they will all relate solely to the research that is being conducted.

Do you wish to receive such emails in between survey periods?

Please select one.

Yes, I would like to receive communications in between research surveys.
No, I do not want to receive communications in between research surveys.

Please press next for information about the incentive for this survey.

[DISPLAY SCREEN - INCENTIVE]

Please be assured that we will protect the confidentiality of your survey answers and will not link them to your name. Below we are asking for your preferred email address for purposes of sending you a \$10 Amazon E-certificate for completing this Vanguard Research Initiative surveys. Ipsos, the survey administrator, does not have your name and information available and will utilize this contact information only for purposes of sending your E-certificate.

With your completion of this survey, you are eligible for a \$10 thank-you Amazon E-certificate.

Please enter your name and email address where you would like to receive your \$10 Amazon E-certificate. This information will only be used to send your thank-you E-certificate. If you do not provide your name and email address, then Ipsos will not be able to send you the Amazon E-certificate.

Please check this box, if you wish to OPT out of the \$10 thank-you Amazon E-certificate.

[PN: If box is checked do Not force First Name, Last Name or Email Address;
If box is Not checked, force First Name, Last Name & Email address]

First Name: **[DISPLAY BOX TO ACCEPT NAME TEXT]**

Last Name: **[DISPLAY BOX TO ACCEPT NAME TEXT]**

Email address: **[INSERT TEXT BOX "A" FOR EMAIL ADDRESS – 40 CHARACTERS LONG]**
[FORMATTING SHOULD ALLOW FOR EMAIL ADDRESSES SUCH AS [xxx@xxx.xxx.com](#) TO BE ACCEPTED IN ADDITION TO THE [xxx@xxx.com](#) format]

Please confirm your email address by entering it again: **[INSERT TEXT BOX "B" FOR EMAIL ADDRESS – 40 CHARACTERS LONG]**

[MANDATORY ENTRY OF EMAIL ADDRESS]

[DISPLAY CONFIRMATION EMAIL ADDRESS ON SAME SCREEN AS ORIGINAL EMAIL ADDRESS ENTRY]

[TEXT BOX "A" MUST EQUAL TEXT BOX "B". IF "A" DOES NOT EQUAL "B", GENERATE ERROR WITH THIS TEXT: The email addresses you entered do not match. Please reconfirm the email.]

QEND. Thank you very much for completing this survey. If you have any comments related to the survey, please share them with us below. **[OPTIONAL OPEN END]**
[MUTUALLY EXCLUSIVE CHECK BOX FOR 'No comments']

[IMODERATE CHAT INSERTION HERE DURING SOFT LAUNCH ONLY (REMOVED FOR FULL LAUNCH)]

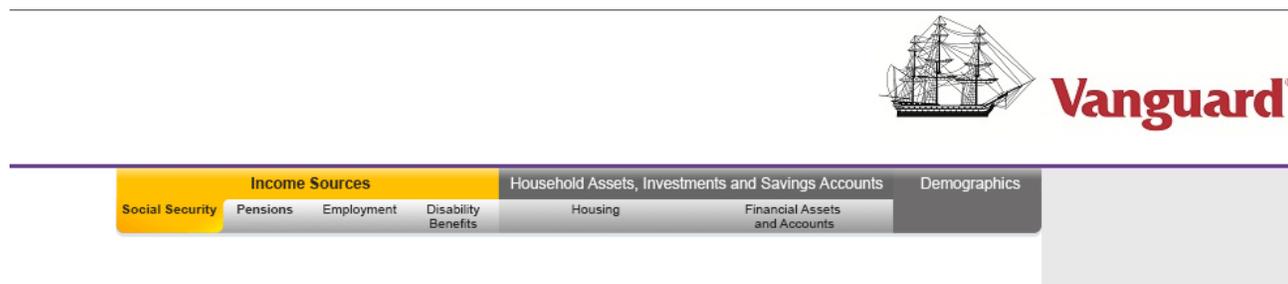
[DISPLAY FINAL THANK YOU SCREEN]

We thank you again for your help with this important study.
You may close your browser window now.

Custom Bookmark/Progress Bar

EXAMPLE OF CUSTOM BOOKMARK LIKE IN SURVEY #1, MINYVAN TO BE CARRIED INTO THIS PROGRAM (THOUGH WITH DIFFERENT TEXT)

[PROG: BEGIN DISPLAYING CUSTOM PROGRESS PART (GRAPHIC BOOKMARK) ON Q1. THIS GRAPHIC BOOKMARK SHOULD BE USED IN PLACE OF A TRADITIONAL PROGRESS BAR.]



SET UP WITH THE TYPE OF DISPLAY ABOVE, USING THESE SECTIONS HEADERS:

About the progress bar, we would like to have three sections as following:

Section I: beginning - right before [CHECKPOINT: HRS_CONDITIONAL_RETIREMENT]

Section II: [CHECKPOINT: HRS_CONDITIONAL_RETIREMENT] - [BREAKPOINT: IES]

Section III: [BREAKPOINT: IES] - end of the survey.

We understand that the length of sections might be very unequal depending on the flow each respondent will have, in particular for the returning respondents, but we think this is the most natural way to divide the survey.