

# Using Accordion Templates for Expandable Rosters – HRS Experiences

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The Health and Retirement Study (HRS) at the University of Michigan Institute for Social Research is a longitudinal study that originated in 1992, switched to conducting interviews using Blaise 4 in 2002, and Blaise 5 in 2018. One of the challenges faced by HRS across this long period of Blaise development has been how to handle editable tables (we often refer to these as “rosters”) of people, such as children of respondents, or things, such as pensions. This challenge has intensified with the adoption of Blaise 5 and the corresponding move into browser-based self-administered interviewing over the internet. This paper will discuss the history of HRS rosters, including the various design goals and specifications involved, and it will also discuss the specific implementation, using “accordion” templates, of various rosters in an auxiliary instrument currently under development called Life History Mail Survey (LHMS). The latter is a longstanding mail supplement to the HRS, which is going to include an internet version of the survey for the first time this year. Overall, HRS has been looking for ways to make rosters that can dynamically expand (add more children, pensions, etc. with a large capacity), that can be preloaded, that work well on both desktop and phone browsers and form factors, and that offer interactive navigation between elements and summary information when not on the same page. For LHMS specifically, a new approach was tried which attempts to combine all elements and summary information into a single page by use of “accordion” templates. Details of this endeavor, including successful implementation of the basic design, as well as the many problems and limitations encountered will be discussed. In many ways, this new approach looks promising, but a number of obstacles will need to be overcome to ensure its future viability.