

# Life History Mail Survey

- **Background:** The Life History Mail Survey (LHMS) contains questions about residential history, education history, marriage and partnership, health conditions and other important childhood and family events. The LHMS is part of the Health and Retirement Study (HRS), which is funded under a cooperative agreement between the National Institute on Aging (NIA) and the Survey Research Center at the University of Michigan.
- **Paper and Pencil Design:** A brochure, approximately 40 pages long, is mailed to respondents. The survey takes approximately 90 min to complete. Once done, respondents are asked to mail back the brochure. In 2024 HRS started an effort to convert LHMS into a Web Survey to be fielded in May of 2025 (Figure 6).

# LHMS Paper-and-Pencil Rosters

**Q5** In this table, please fill in as much information as you can about **all the places that you have lived for one year or more** from when you were born until **now**.  
**To begin, please enter the year of your birth and the place where you lived when you were born.** Beginning in #2, write the **next** place where you lived for a year or more, and so on. If you can't remember the exact year(s), please estimate the year to the best of your ability. If you lived outside the U.S., write the country name instead of the state. **Use one line for each new place (see example p. 2).**

TABLE COLUMNS SPAN ACROSS BOTH PAGES. ▶

#	Start Year	Street (Number and Street)	City/Town	State (or Country)
1	<input type="text"/>			
2	<input type="text"/>			
3	<input type="text"/>			
4	<input type="text"/>			
5	<input type="text"/>			
6	<input type="text"/>			
7	<input type="text"/>			

◀ TABLE COLUMNS SPAN ACROSS BOTH PAGES.

#	Zip Code	Did you or your family own or rent this residence? [Check one box]
1	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
2	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
3	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
4	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
5	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
6	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know
7	<input type="text"/>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/> Don't know

# Why not use a table for the event history rosters?

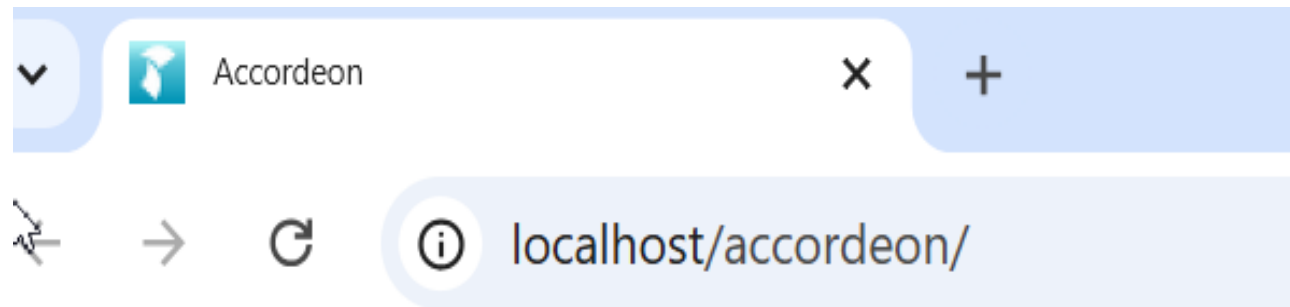
- **1. Poor User Experience on Small Screens**
  - Tables do not scale well on mobile devices, often requiring users to scroll horizontally or zoom in/out to see content
  - Touch interactions with small table cells can be frustrating, leading to mistakes
- **2. Visual Overload and Clutter**
  - Tables display all data at once, making it overwhelming—especially for long surveys with multiple sections
  - Respondents may feel fatigued when faced with a large grid of empty or unnecessary fields
- **3. Fixed Structure, Limited Flexibility**
  - Traditional tables often have a preset number of rows, requiring extra fields that may not be needed
  - Users cannot easily add or remove rows dynamically based on their life events

# Design Goals & Requirements

- **Expandable Rows:** Users can expand or collapse rows to improve readability and navigation
- **Growing Tables:** Allows respondents to dynamically add or remove rows based on their life events (e.g., marriages, education, employment)
- **Responsive Layout:** Seamless transition between PC and mobile views for an optimized user experience
- **Summary View When Collapsed:** Displays key information in a concise format, helping respondents recall past life events

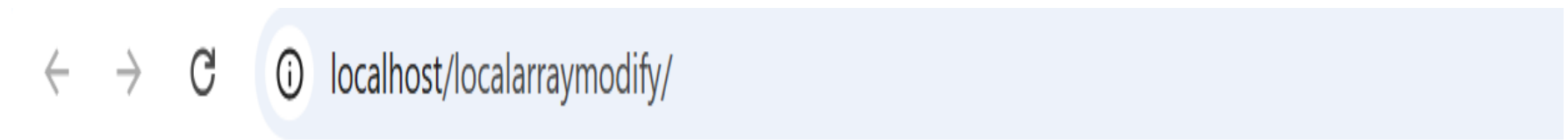
# Design Goals & Requirements

- **Accordion Roster:** Uses collapsible sections (rows) to present information efficiently while also serving as a summary screen
- **Dynamic Row Management:** Provides the ability to insert or delete rows as needed
- **Adaptive UI Design:** Ensures usability across different devices by switching between layouts appropriately
- **Automatic Summary Generation:** When collapsed, the accordion serves as a summary screen and displays key details from expanded sections to aid memory recall



## Accordeon

<b>Person 1</b>	<input type="text" value="Helena"/>
<b>Person 2</b>	<input type="text" value="Tim"/>
<b>Person 3</b>	<input type="text" value="Natalie"/>
<b>Age</b>	<input type="text" value="23"/>
<b>Gender</b>	<input type="radio"/> male <input checked="" type="radio"/> female
<b>Income</b>	<input type="text" value="5000"/>
<b>Person 4</b>	<input type="text"/>



## Locally add and remove rows

	First Name	Last Name	Age	
<b>Person 1</b>	<input type="text" value="Helena"/>	<input type="text" value="Stolyarova"/>	<input type="text" value="54"/>	
<b>Person 2</b>	<input type="text" value="Jack"/>	<input type="text" value="Willis"/>	<input type="text" value="18"/>	<input type="button" value="Delete"/>
<b>Person 3</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>

LastQuestion

- Visibility Condition is the Example
- IF State.ActiveGroupName <> ParentName THEN
- 'Collapsed'
- ELSE
- 'Visible'
- ENDIF

The screenshot shows a software interface with a main text area and a sidebar. The main text area contains the following code snippet:

```
IF (State.ActiveGroupName <> REPLACE(Field.Name, '.' + Field.LocalName, '' ) AND  
State.ActiveGroupName <> REPLACE(Field.Name, '.' + Field.LocalName, '' ) + '.HeaderFields') OR  
HiddenFieldGrid.AnswerStatus <> EMPTY THEN  
  'Collapsed'  
ELSE  
  'Visible'  
ENDIF
```

The sidebar on the right contains three sections:

- Constructs**: A dropdown menu showing "IF...THEN...ELSE...ENDIF" and a yellow "+" button.
- Functions**: A dropdown menu showing "\*" and a yellow "+" button.
- Variables**: A list of variables with dropdown menus and yellow "+" buttons. The visible variables are "CaseID" and "AnswerStatus".

At the bottom of the main text area, there is a table with the following headers:

Type	Li	Col	Message
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# Implementation Approach: EAR (Expandable Accordion Rosters)

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# Implementation Approach: EAR (Expandable Accordion Rosters)

**HRS** HEALTH AND RETIREMENT STUDY **Life History Survey**

- For the following, please fill in as much information as you can about **all the places that you have lived for one year or more** from when you were born until **now**.
- **To begin, please enter the year of your birth and information about the place where you lived when you were born.**
- Then, add the next place where you lived for a year or more, and so on.
- If you can't remember the exact year(s), please estimate the year to the best of your ability.

<b>1. Start Year</b> <input type="text" value="1970"/>	<b>Street Address</b> <input type="text" value="123 Palm Street"/>	<b>City/Town</b> <input type="text" value="Moscow"/>	<b>Collapse ▲</b>
<b>State</b> <input type="text" value="Wyoming"/>			
<b>Country (if outside of US)</b> <input type="text"/>			
<b>Zip Code</b> <input type="text" value="12345"/>			
<b>Did you or your family own or rent this residence?</b> <input type="radio"/> Own <input type="radio"/> Rent <input checked="" type="radio"/> Other <input type="radio"/> Don't know			
<b>Add next residence</b>			
<b>Delete residence</b>			
<b>2. Start Year</b> <input type="text" value="2002"/>	<b>Street Address</b> <input type="text" value="345 Deer Run Avenue"/>	<b>City/Town</b> <input type="text" value="Carson"/>	<b>Expand ▼</b>
<b>3. Start Year</b> <input type="text" value="2003"/>	<b>Street Address</b> <input type="text" value="3789 Curlew Lane"/>	<b>City/Town</b> <input type="text" value="Ann Arbor"/>	<b>Expand ▼</b>

When finished, please click the 'Done Adding Residences' button to review your answers and make any needed corrections, then click 'Next' to continue.

**Done Adding Residences**

**Comment**

**Next**