

# **THE PANEL STUDY OF INCOME DYNAMICS'**

## **WELL BEING AND DAILY LIFE SUPPLEMENT (PSID-WB)**

### **USER GUIDE**

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## Table of Contents

INTRODUCTION .....	3
THE PSID-WB INSTRUMENT.....	3
SCALES THAT MAY BE CONSTRUCTED .....	4
PARADATA.....	6
SAMPLE AND DATA COLLECTION PROCEDURES .....	6
RESPONSE RATES, WEIGHTING AND ADJUSTING FOR NON-RESPONSE IN EARLY RELEASE FILE .....	7
LINKING THE EARLY FILE TO MAIN PSID.....	9
REFERENCES .....	10

## INTRODUCTION

The 2016 Wellbeing and Daily Life study is a supplement to the Panel Study of Income Dynamics (PSID), a longitudinal study of a nationally representative sample of U.S. individuals and the families in which they reside. Since 1968, the PSID has collected information on family composition changes, expenditures, marriage and fertility histories, employment, income, time spent in housework, health, wealth, and more. For additional details on the PSID, see the PSID Main Interview User Guide at <http://www.psidonline.isr.umich.edu/Guide/documents.aspx> and McGonagle et al. (2012).

## THE PSID-WB INSTRUMENT

The PSID-WB questionnaire was designed as a relatively brief (20-30 minute) self-administered instrument that could be completed via the internet or paper. The questionnaire collects information on three main topics of interest – wellbeing (Sections A-C), personality traits (Sections D-G), and every day skills (Sections H-K).

**Section A: Life satisfaction and flourishing.** This section asks about satisfaction with life as a whole, as well as satisfaction with different parts of life including health, work, and family. The questions draw upon research carried out at the Institute for Social Research (ISR) in the 1970s (Campbell et al. 1976). A final set of questions focuses on flourishing in important areas of life such as relationships and purpose (Diener et al. 2009).

**Section B: Positive and negative emotions (30-day).** Questions in this section ask how often the respondent felt positive and negative emotions in the past 30 days. The items were drawn from the Midlife in the United States (MIDUS) study and have also been included in the Health and Retirement Study (Mroczek & Kolarz 1998). The negative emotion items are similar to those developed for the U.S. National Health Interview Survey and also appear in the PSID (Kessler et al. 2002).

**Section C: Activities and experienced wellbeing (yesterday).** This section asks respondents to reconstruct their experience on the prior day. After being asked to report what they did and who they were with, they are then asked to report how they felt yesterday. The questions are modeled after a technique called the Day Reconstruction Method (Kahneman et al. 2004). Time pressure on the prior day and whether yesterday was typical are also assessed.

**Sections D and E: Personality and Self-efficacy.** This section collects information on major personality types (extraversion, agreeableness, conscientiousness, neuroticism, and openness to experience) using items developed for the German Socio-Economic Panel Study (Gerlitz & Schupp 2005). This measure was developed as a brief assessment tool with three items per trait, so alpha reliabilities tend to be somewhat lower than in more detailed instruments (Donnellan & Lucas 2008; Lang et al. 2011). An additional set of questions measure self-efficacy, that is, how much control the respondent feels he/she has in everyday life (Veroff et al. 1971).

**Section F: Trust-Hostility.** Drawn from one of the earliest waves of the PSID, questions in this section measure how trusting respondents are of other people (Veroff et al. 1971).

**Section G: Achievement orientation.** Also drawn from one of the earliest waves of the PSID, these items measure achievement orientation, that is, how focused respondents are on achievement (Veroff et al. 1971).

**Section H: Verbal Reasoning.** A series of sentence completion questions, drawn from the 1972 PSID, measures verbal reasoning (Veroff et al. 1971).

**Section I: Health Literacy.** This section measures how well respondents understand health care materials. Items I2-I4 were drawn with permission from a scale known as the Test of Functional Health Literacy in Adults (Nurss et al. 2001).

**Section J: Quantitative Reasoning.** This section asks the respondent to fill in a missing number in order to complete a series. The items, designed to measure mathematical (or “quantitative”) reasoning, were drawn from the 2012 Health and Retirement Study (Fisher et al. 2014). On the web, respondents receive 2 blocks of 3 items each; the difficulty level of the second block depends on the score on the first block. On paper, respondents receive 7 items in all, three from the first block and then one (middle) item from each potential follow-up block.

**Section K: Financial Literacy.** This section measures the use of math skills in daily life. Items have been previously used in the Health and Retirement Study, the English Longitudinal Study of Ageing, and the Survey of Health, Ageing and Retirement in Europe (Banks et al. 2010).

## SCALES THAT MAY BE CONSTRUCTED

A number of scales may be constructed from various items in the Wellbeing and Daily Life Study. Below we provide for each scale a brief description, items to be used (and whether they should be reversed), and reference.

Scale	Items	Reference
Satisfaction with Overall Life	A3A-A3E (Reverse)	Diener, E., Emmons, R. A., Larsen, R. J., & Griffin, S. (1985). The Satisfaction with Life Scale. <i>Journal of Personality Assessment</i> , 49, 71-75.
Satisfaction with Aspects of Life	A4A-A4J & A5A-A5J	Campbell, A., Converse, P.E., Rodgers, W. (1976). <i>The Quality of American Life: Perceptions, Evaluations, and Satisfactions</i> . New York: Russell Sage Foundation.
Flourishing	A6A-A6H (Reverse)	Diener, E., Wirtz, D., Tov, W., Kim-Prieto, C., Choi, D., Oishi, S., & Biswas-Diener, R. (2009). New measures of well-being: Flourishing and positive and negative feelings. <i>Social Indicators Research</i> , 39, 247-266.
Positive and Negative Affect in Past 30 Days	B1A-B1F B2A-B2F (K6 Scale)	Kessler, R.C., Andrews, G., Colpe, L.J., Hiripi, E., Mroczek, D.K., Normand, S.L.T., et al. (2002). Short screening scales to monitor population prevalence and trends in non-specific psychological distress. <i>Psychological Medicine</i> 32(6):959-976.  Mroczek, D.K. & Kolarz C. (1998). The Effect of Age on Positive and Negative Affect: A Developmental Perspective on Happiness. <i>Journal of Personality and Social Psychology</i> 75(5), 1333-1349.

Scale	Items	Reference
Experienced wellbeing	C14A-E (positive), C15A-G (negative), C16A-B (tired, pain)	Kahneman, D., Krueger, A. B., Schkade, D., Schwarz, N., & Stone, A. A. (2004). A survey method for characterizing daily life experience: The Day Reconstruction Method (DRM). <i>Science</i> , 306, 1776-1780.  Lee, Y., Hofferth, S.L., Flood, S.M. and Fisher, K. (2016). Reliability, Validity, and Variability of the Subjective Well-Being Questions in the 2010 American Time Use Survey. <i>Social Indicators Research</i> 126:1355-1373.
Personality (Big 5)	Conscientiousness: D1A (Reverse), D1G, D1K (Reverse) Extraversion: D1B (Reverse), D1H (Reverse), D1L Agreeableness: D1C, D1F (Reverse), D1M (Reverse) Openness: D1D (Reverse), D1I (Reverse), D1N (Reverse) Neuroticism: D1E (Reverse), D1J (Reverse), D1O	Gerlitz, Y., & Schupp, J. (2005). Assessment of big five personality characteristics in the SOEP. German Institute of Economic Research (Research Notes 4) Berlin: DIW.
Self-efficacy	E1-E4, E5 (Reverse), E6  Also available in 1972: V2743, V2744, V2745, V2746, V2748, V2755	Veroff, J., McClelland, L., & Marquis, K. (1971). Measuring intelligence and achievement motivation in surveys (PSID Technical Series Paper 71-01). Ann Arbor: University of Michigan
Trust or Hostility	E7 (Reverse), F1-F3, F4 (Reverse)  Also available in 1972: V2751, V2752, V2753, V2756, V2757	Veroff, J. et al.
Achievement Motivation	G3, G6, G8 G1, G2, G4, G5, G7, G9, G10 (Reverse code)  Also available in 1972: V2759-V2768.	Veroff, J. et al.
Verbal Reasoning	H1-H6 (Sum correct items)  Also available in 1972: V2733, V2736, V2737, V2739, V2741 and V2742.	Veroff, J. et al.
Health literacy	I2-I4 (Sum correct items)	Nurss, J.R., Parker, R.M., Williams, M.V., & Baker, D.W. (2001). Test of Functional Health Literacy in Adults. Available from Peppercorn Books and Press, Inc.

Scale	Items	Reference
Quantitative Reasoning	J11-J63 Web: Average items (correct=1) Paper: Identify skip that would have occurred on web and average first three items with appropriate follow-up item (correct=1).	Fisher, G.G., McArdle, J.J, McCammon, R.J., Sonnega, A., & Weir, D.R. (2014). New Measures of Fluid Intelligence in the HRS. University of Michigan.
Financial Literacy	K1-K6	Banks, J., O’Dea, C., & Oldfield, Z. (2010). Cognitive Function, Numeracy and Retirement Saving Trajectories. Economic Journal, 120, F381-F410.

## PARADATA

For web respondents only, we include several section-level variables including: length of time spent in the section,<sup>1</sup> whether the respondent backed up in the section, and whether the respondent broke off in the section. This information is strongly related to the number of pages and/or items per section, which we provide below for both web and paper instruments:

Section	Web		Paper	
	Number of Pages	Number of Items	Number of Pages	Number of Items
A	6	35	4	35
B	2	12	1	12
C	18	36	6	36
D	1	15	1	15
E	7	7	1	7
F	4	4	1	4
G	10	10	2	10
H	6	6	2	6
I	4	4	1	4
J	6	6	1	7
K	6	6	1	6

In addition, for section J, we include the amount of time spent on each item.

We also include a variable indicating the mode (web, paper, phone) in which the questionnaire was completed. For those who completed the instrument by web, we also provide the initial and final platform (computer, tablet, or mobile phone).

## SAMPLE AND DATA COLLECTION PROCEDURES

### Eligible Sample

To be eligible for the Wellbeing and Daily Life study, individual were required to be at least 30 years old (by

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<sup>1</sup> If the respondent timed out on a particular page, we topcoded the page to 15 minutes before summing across pages to create section times.

December 31, 2015) and to have been a household head or spouse/partner in the 2015 Main PSID. Individuals for whom other family unit members or proxies served as respondents in the 2015 Main PSID interview and those who completed their core interview in Spanish were not eligible. Eligibility status was confirmed for 10,745 cases.

#### Data Collection Procedures

The PSID-WB actively collected data for approximately 15 weeks, from March 2016 through the end of June 2016, and then continued to accept responses for several months. This release includes responses through August 1, 2016.

The invitation letter included the web address of the survey and a login name and password and \$5. Invitations were mailed to individuals (rather than couples), so that spouses/partners within PSID families each received their own credentials. For people we expected to answer by paper (the “choice” group) the letter also stated a paper version would be sent in a few weeks. Upon completion of the survey, individuals were sent a check from the University of Michigan in the amount of \$20.

To encourage participation, non-respondents were sent regular reminders by mail and were either sent email reminders or called. Individuals assigned to the choice group were sent up to four copies of the paper questionnaire; others were sent up to three copies. Beginning in week 6 all non-respondents were called and reminded up to three times. We also accommodated the small number of people who requested to have the survey administered over the phone. The final mailing mentioned the study was closing soon and included an additional token of appreciation of \$5.

#### Data Entry

Answers from paper copies and phone interviews were entered into the web application by a trained staff member. A variable has been included on the early release file indicating the final mode.

### **RESPONSE RATES, WEIGHTING AND ADJUSTING FOR NON-RESPONSE IN EARLY RELEASE FILE**

The PSID-WB study attempted to interview all household heads and spouses/partners ages 30 and older either through web or a paper questionnaire. The preliminary unweighted response rate was 77% and the preliminary weighted response rate was 81%. An early data file (N=8,303) is available at <http://simba.isr.umich.edu/Zips/EarlyRelease.aspx>.

#### Weights and Adjusting for Non-Response

Preliminary sample weights that adjust for differential probabilities of selection, response to PSID core, and response to WB have been provided on the early release file. Preliminary weights are based on the 2013 Core PSID cross-sectional individual weight, which is described in a technical working paper available at [http://www.psidonline.isr.umich.edu/data/weights/cross\\_sec\\_weights\\_13.pdf](http://www.psidonline.isr.umich.edu/data/weights/cross_sec_weights_13.pdf). (A final weight will be included in the final file that uses the 2015 cross-sectional individual weight as a starting point). These base weights were adjusted for differential non-response using 1 / weighted probability of responding for the following groups:

<u>Age Group</u>	<u>Sample</u>	<u>Education in 2013</u>	<u>Gender</u>	<u>N</u>	<u>RR</u>	<u>1/RR</u>
Age <40	SEO/Imm	<HS/missing	Male	127	45.1%	2.22
Age 40-59	SEO/Imm	<HS/missing	Male	112	59.5%	1.68
Age 60+	SEO/Imm	<HS/missing	Male	51	51.8%	1.93
Age <40	SRC	<HS/missing	Male	164	56.9%	1.76
Age 40-59	SRC	<HS/missing	Male	148	66.4%	1.51
Age 60+	SRC	<HS/missing	Male	94	75.7%	1.32
Age <40	SEO/Imm	HS/Some Col	Male	363	55.3%	1.81
Age 40-59	SEO/Imm	HS/Some Col	Male	401	72.1%	1.39
Age 60+	SEO/Imm	HS/Some Col	Male	148	69.2%	1.45
Age <40	SRC	HS/Some Col	Male	516	65.0%	1.54
Age 40-59	SRC	HS/Some Col	Male	745	77.0%	1.30
Age 60+	SRC	HS/Some Col	Male	470	88.0%	1.14
Age <40	SEO/Imm	College+	Male	111	70.8%	1.41
Age 40-59	SEO/Imm	College+	Male	111	75.1%	1.33
Age 60+	SEO/Imm	College+	Male	61	84.8%	1.18
Age <40	SRC	College+	Male	387	85.5%	1.17
Age 40-59	SRC	College+	Male	454	83.0%	1.21
Age 60+	SRC	College+	Male	399	92.2%	1.09
Age <40	SEO/Imm	<HS/missing	Female	140	50.1%	2.00
Age 40-59	SEO/Imm	<HS/missing	Female	152	65.8%	1.52
Age 60+	SEO/Imm	<HS/missing	Female	73	70.4%	1.42
Age <40	SRC	<HS/missing	Female	130	62.6%	1.60
Age 40-59	SRC	<HS/missing	Female	138	71.7%	1.40
Age 60+	SRC	<HS/missing	Female	110	87.6%	1.14
Age <40	SEO/Imm	HS/Some Col	Female	452	68.5%	1.46
Age 40-59	SEO/Imm	HS/Some Col	Female	635	75.1%	1.33
Age 60+	SEO/Imm	HS/Some Col	Female	231	70.3%	1.42
Age <40	SRC	HS/Some Col	Female	508	75.0%	1.33
Age 40-59	SRC	HS/Some Col	Female	820	80.5%	1.24
Age 60+	SRC	HS/Some Col	Female	658	87.8%	1.14
Age <40	SEO/Imm	College+	Female	203	91.5%	1.09
Age 40-59	SEO/Imm	College+	Female	189	77.3%	1.29
Age 60+	SEO/Imm	College+	Female	62	84.5%	1.18
Age <40	SRC	College+	Female	496	90.2%	1.11
Age 40-59	SRC	College+	Female	556	86.7%	1.15
Age 60+	SRC	College+	Female	330	91.5%	1.09



## **LINKING THE EARLY FILE TO MAIN PSID**

The early release includes variables to link to the 1968-2013 Public Release Files. (The final file will include variables to link to the 2015 Public Release Files). To merge the PSID-WB data with the 1968-2013 Public Release Individual File, users should merge records where both WB16ID13=ER34201 (2013 Family Interview ID Number) and WB16SN13=ER34202 (2013 Sequence Number). To merge the PSID-WB data with the 1968-2013 Public Release Family File, users should merge records where WB16ID13=ER53002 (2013 Family Interview ID Number).

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