# NHATS Round 5

**Section    IS    [INTERVIEW SETUP]**                                    Sequence: 1

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**IS1**                    **IS1**                          NOT ON FILE

**Display Instructions:**
If New SAMPLE flag= 1 (YES), display "REMINDER FOR THIS NEW SAMPLE CASE: OBTAIN SIGNED CONSENT FROM THE SP OR PROXY BEFORE CONTINUING WITH THE INTERVIEW" in underlined red.

**QUESTION TEXT:**

YOU HAVE SELECTED CASE {CASE ID} FOR {SP}.

IF THIS IS CORRECT, PRESS 1 AND ENTER TO CONTINUE

TO SELECT ANOTHER CASE, BREAKOFF AND SELECT THE CORRECT CASE ID FROM THE IMS.

{REMINDER FOR THIS NEW SAMPLE CASE:
OBTAIN SIGNED CONSENT FROM THE SP OR PROXY BEFORE CONTINUING WITH THE INTERVIEW}

---

**IS2**              **is5resptype**          R5 IS2 TYPE OF RESPONDENT

                     **op5proxy**             R5 IS2 PROXY

**QUESTION TEXT:**

SELECT TYPE OF RESPONDENT

**CODES**

| | | |
|---|---|---|
| 1 | SAMPLE PERSON (SP) | BOX IS2C |
| 2 | PROXY | |

**PROGRAMMER INSTRUCTIONS:**

If IS2=2 (PROXY), SET PROXY flag = 1 (YES) AND DISPLAY APPROPRIATE PROXY DISPLAYS FOR ALL QUESTIONNAIRE ITEMS.

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**IS2A**             **is5reasnprx1**         R5 IS2A PROXY REAS SP DEMENTIA

                     **is5reasnprx2**         R5 IS2A PROXY REAS SP ILL

                     **is5reasnprx3**         R5 IS2A PRXY REAS SP SPCH IMPAIR

                     **is5reasnprx4**         R5 IS2A PRXY REAS SP HEAR IMPAIR

                     **is5reasnprx5**         R5 IS2A PROXY REAS LANG BARRIER

                     **is5reasnprx6**         R5 IS2A PROXY REAS TEMP UNAVAIL

                     **is5reasnprx7**         R5 IS2A PROXY REAS DECEASED

                     **is5reasnprx9**         R5 IS2A PROXY REAS OTHER

**QUESTION TEXT:**

SPECIFY REASON FOR PROXY

SELECT ALL THAT APPLY

**CODES**

| | | |
|---|---|---|
| 1 | DEMENTIA/COGNITIVE/MENTAL IMPAIRMENT REPORTED BY PROXY | BOX IS2C |
| 2 | SP TOO ILL/MAJOR PHYSICAL HELATH ISSUES | BOX IS2C |
| 3 | SP SPEECH IMPAIRED | BOX IS2C |
| 4 | SP HEARING IMPAIRED | BOX IS2C |
| 5 | LANGUAGE BARRIER | BOX IS2C |
| 6 | SP TEMPORARILY UNAVAILABLE | IS2BC |
| 7 | SP DECEASED | BOX IS2C |
| 91 | OTHER (SPECIFY) | |

**PROGRAMMER INSTRUCTIONS:**

Allow select all that apply.

If IS2A = 7 (DECEASED), display soft error message "YOU HAVE SELECTED SP DECEASED.  IF SP IS STILL LIVING, SELECT A DIFFERENT OPTION.  IF SP IS DECEASED, SELECT SUPPRESS TO CONFIRM.".

If IS2A = 7 (DECEASED) AND 1-6 OR 91, display error message "INCONSISTENT ANSWER.  SP DECEASED CANNOT BE SELECTED WITH OTHER PROXY REASONS.".

If IS2A = 7 (DECEASED), set DECEASED flag = 1 (YES).

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## IS2B          IS2B                    NOT ON FILE

**QUESTION TEXT:**

SPECIFY REASON FOR PROXY

**ENTER TEXT**

Length                                   50

**PROGRAMMER INSTRUCTIONS**

If IS2A = 6 (SP UNAVAILABLE), go to IS2B2.
Otherwise, go to BOX IS2C

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## IS2B2          is5tempres              R5 IS2B2 TEMPORARY RESIDENCE

**QUESTION TEXT:**

SPECIFY WHERE SP IS TEMPORARILY RESIDING

IF NEEDED, ASK: Where is {SP} currently residing or staying?

**CODES**

| | | |
|---|---|---|
| 1 | HOSPITAL | BOX IS2C |
| 2 | NURSING HOME/REHAB CENER | BOX IS2C |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | BOX IS2C |
| | DON'T KNOW | BOX IS2C |

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## IS2B3          IS2B3                   NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER PLACE SP IS TEMPORARILY RESIDING.

**ENTER TEXT**

## BOX IS2C

| BOX IS2C | NOT ON FILE |
|---|---|

IF CASE IS A RESTART (CAPI STATUS CODE 12) AND IS2=1 (SP) AND (SP AUDIO ASSENT=1 (YES) OR SP AUDIO ASSENT=2  (NO)), GO TO IS3.

ELSE IF CASE IS A RESTART (CAPI STATUS CODE 12) AND IS2=2 (PROXY) AND (PROXY AUDIO ASSENT=1 (YES) OR PROXY AUDIO ASSENT=2 (NO)), GO TO IS3.

ELSE GO TO IS2C.

## IS2C

| IS2C | NOT ON FILE |
|---|---|

**DISPLAY INSTRUCTIONS:**

DO NOT DISPLAY RESPONSE CODES AND LABELS

**QUESTION TEXT:**

During the course of the study, we would like to record some of the questions and answers for training and data quality.  I'd like to continue now, unless you have any questions.

PRESS 1 AND ENTER TO CONTINUE

IF RESPONDENT REFUSES TO ALLOW AUDIO RECORDING, PRESS 7 AND ENTER

**CODES**

| | | |
|---|---|---|
| 1 | CONSENT TO RECORDING | IS3 |
| 7 | REFUSE CONSENT TO RECORD | IS2D |

**PROGRAMMER INSTRUCTIONS:**

IF IS2c=1 (OK TO RECORD), SET AUDIORECORDING FLAG=1 (YES).
IF RESPONDENT TYPE AT IS2=1 (SP), SET SPAUDIOASSENT FLAG=1 (YES).
IF RESPONDENT TYPE AT IS2=2 (PROXY), SET PROXYAUDIOASSENT FLAG=1 (YES).

ELSE IF IS2c=7 (REFUSED TO RECORD), SET AUDIORECORDING FLAG =2 (NO).
IF RESPONDENT TYPE AT IS2=1 (SP), SET SPAUDIOASSENT FLAG = 2 (NO).
IF RESPONDENT TYPE AT IS2=2 (PROXY), SET PROXYAUDIOASSENT=2 (NO).

DO NOT DISPLAY THIS SCREEN ON BACK UP OR RESTARTS (CASE STATUS = 12 (STARTED) UNLESS RESPONDENT TYPE IS CHANGED AT IS2 ON RESTART (CASE STATUS = 12 (STARTED).

## IS2D

| IS2D | NOT ON FILE |
|---|---|

**QUESTION TEXT:**

That's fine.  The interview will not be recorded.

PRESS 1 AND ENTER TO CONTINUE

## IS3

| IS3 | NOT ON FILE |
|---|---|

**DISPLAY INSTRUCTIONS:**

If IS2A=7 (SP DECEASED), display "was".

Otherwise, display "is".

**QUESTION TEXT:**

> Before we start, I just want to confirm that {your/SP's} name {is/was} {SP'S FIRST NAME} {SP'S MIDDLE NAME} {SP'S LAST NAME}. Is that correct?
>
> SPELL OUT SP'S NAME. CONFIRM SPELLING.

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX IS4 |
| 2 | NO | |

**PROGRAMMER INSTRUCTIONS:**

If Breakoff at or before this screen, do not save any data and set case status = 11 (READY).

---

# IS3A                      IS3A                      NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded SP name in the response fields.

Display "FIRST" in bold underlined text.

Display SP first name in fill as bold underlined.

If IS2A=7 (SP DECEASED), display "was".
Otherwise, display "is".

**QUESTION TEXT:**

> What {is/was} the correct spelling of {your/SP's} full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT FIRST NAME. CONFIRM SPELLING

**ENTER TEXT**

Length                                        45

**PROGRAMMER INSTRUCTIONS:**

Display IS3a, 3b, and 3c on the same screen.

---

# IS3B                      IS3B                      NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "MIDDLE" in bold underlined text.

Display SP middle name in fill as bold underlined.

If IS2A=7 (SP DECEASED), display "was".
Otherwise, display "is".

**QUESTION TEXT:**

> What {is/was} the correct spelling of {your/SP's} full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT MIDDLE NAME. CONFIRM SPELLING
>
> PRESS ENTER IF NO MIDDLE NAME OR INITIAL

**ENTER TEXT**

**PROGRAMMER INSTRUCTIONS:**
   Display IS3a, 3b, and 3c on the same screen.

   Allow empty.

---

# IS3C                          IS3C                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**
   Display "LAST" in bold underlined text.

   Display SP last name in fill as bold underlined.

   If IS2A=7 (SP DECEASED), display "was".
   Otherwise, display "is".

**QUESTION TEXT:**

> What {is/was} the correct spelling of {your/SP's} full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT LAST NAME. CONFIRM SPELLING

**ENTER TEXT**
                    Length                                 25

**PROGRAMMER INSTRUCTIONS:**

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# BOX IS4                       BOXIS4                        NOT ON FILE

**QUESTION TEXT:**

> If NEWSAMPLE flag = 1 (YES), go to IS4.
> Otherwise, go to BOX IS8.

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# IS4                           r5dgender                     R5 D GENDER OF SP

**QUESTION TEXT:**

> THE SP IS LISTED AS A {MALE/FEMALE}
>
> IF GENDER IS OBVIOUS, CODE WITHOUT ASKING
>
> OTHERWISE ASK: {Are you/Is SP} male or female?

**CODE**
   1                    MALE
   2                    FEMALE

---

# BOX IS4A                      BOXIS4A                       NOT ON FILE

Compare preloaded gender of SP with IS4 value
just entered. If they are the same, go to IS6.
Otherwise, go to IS4a

---

**IS4A**                    IS4A                    NOT ON FILE

**QUESTION TEXT:**

YOU JUST CHANGED SP'S GENDER FROM {PRELOADED GENDER MALE/FEMALE} TO
{FEMALE/MALE FROM IS4}.  DID YOU INTEND TO DO THAT?

**CODE**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | IS4 |

**PROGRAMMER INSTRUCTIONS:**

If IS4A= 2 (NO), display hard error message "SELECT "GO TO" TO RETURN TO IS4 AND RE-ENTER RESPONSE."

---

**IS6**          **r5dbirthmth (Sensitive)**    R5 D BIRTH MONTH OF SP

                 **r5dbirthyr (Sensitive**      R5 D BIRTH YEAR OF SP

**DISPLAY INSTRUCTIONS:**

Display preloaded DOB from CMS in the response field.

**QUESTION TEXT:**

What is {your/SP's} date of birth?

ENTER MONTH, DAY, AND YEAR (MM-DD-YYYY)

**PROGRAMMER INSTRUCTIONS:**

Use mask to collect DOB.  Separate mm/dd/yyyy with hyphens for data entry.
MONTH range: 1-12
DAY range: 1-31
YEAR range: (CURRENT YEAR-65) - (CURRENT YEAR-110)

---

**IS7**          **r5dintvwrage (Sensitive)**   R5 D AGE OF SP AT INTERVIEW

                 **r5d2intvrage**               R5 D SP CAT AGE AT INTVW

**DISPLAY INSTRUCTIONS:**

COMPUTE AGE AS (CURRENT DATE – IS6 DOB).

**QUESTION TEXT:**

That makes {you/SP} {CALCULATED AGE} today.  Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | IS6 |

**PROGRAMMER INSTRUCTIONS:**

If IS7= 2 (NO), display hard error message "SELECT "GO TO" TO RETURN TO IS4 AND RE-ENTER RESPONSE."

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## BOX IS8

> Write SP name (preloaded or if corrected at IS3a-c) to the PERSON ROSTER.
>
> If NEW SAMPLE flag =1, write SP DOB (from IS6) and calculated age from IS7 and SP gender (from IS4) to the PERSON ROSTER and set relationship to SP = 1 (SAMPLE PERSON).
>
> If NEW SAMPLE flag = 1 (YES) and IS2=2 (PROXY), go to IS8A.
> Else, if IS2= 2(PROXY), go to IS8.
> Otherwise, go to Section RE - Residence.

## IS8

IS8          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

Display "NOT ON LIST" as first roster option.

**QUESTION TEXT:**

> What is your name?
>
> CHOOSE PERSON FROM LIST.

**PROGRAMMER INSTRUCTIONS:**

If existing ROSTER MEMBER selected, set PROXY RESP CURRENT INT FLAG = 1 for ROSTER MEMBER and go to IS11.

Otherwise, go to IS8A.

## IS8A

IS8A          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in bold underlined text.

**QUESTION TEXT:**

> What is your full name?
>
> ENTER FIRST NAME. CONFIRM SPELLING

**ENTER TEXT**

      Length                45

**PROGRAMMER INSTRUCTIONS:**

Display IS8A, IS8B, and IS8C on the same screen.

Write ROSTER MEMBER to next open position on PERSON ROSTER.

Set PROXY RESP CURRENT INT FLAG = 1 for ROSTER MEMBER.

## IS8B

IS8B          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "middle" in bold underlined text.

**QUESTION TEXT:**

> ENTER MIDDLE NAME. CONFIRM SPELLING.

| PRESS ENTER IF NO MIDDLE NAME OR INITIAL. |

**ENTER TEXT**

        Length                                     25

**PROGRAMMER INSTRUCTIONS:**
Display IS8A, IS8B, and IS8C on the same screen.

Allow empty.

---

## IS8C
           **IS8C**                       NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "last" in bold underlined text.

**QUESTION TEXT:**

| ENTER LAST NAME. CONFIRM SPELLING |

**ENTER TEXT**

        Length                                     25

**PROGRAMMER INSTRUCTIONS:**
Display IS8A, IS8B, and IS8C on the same screen.

---

## IS9
           **is5prxyrelat**         R5 PROXY RELATIONSHIP TO SP

                     **op5relatnshp**         R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**
Display PROXY RELATIONSHIP CODE LIST.

**QUESTION TEXT:**

| How are you related to {SP}? |
| --- |
| IF NEEDED: Are you {his/her}…..? |
| CODE RELATIONSHIP OF PROXY TO SP |
| PRESS F1 FOR HELP SCREEN |

**CODES**

| | |
| --- | --- |
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |

| | |
|---|---|
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

If NEW SAMPLE flag <> 1 (YES) and code = 2 (SPOUSE/PARTNER), 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), OR 8 (STEPSON) selected for new addition to the roster, display soft error message, "UNLIKELY RESPONSE. REVIEW NAMES AND RELATIONSHIPS ON ROSTER AT IS8 TO MAKE SURE PERSON DOESN'T ALREADY EXIST ON THE ROSTER."

If IS9 = 2 (SPOUSE/PARTNER), set SPOUSE/PARTNER flag = 1 (YES) for ROSTER MEMBER ADDED AT IS9, and for ROSTER MEMBER that had LAST INT RELATIONSHIP CODE= 2 (SPOUSE/PARTNER), set CURRENT INT RELATIONSHIP CODE = 33 (EX-SPOUSE/PARTNER).

If 3 (daughter), 5 (daughter-in-law), 7 (stepdaughter), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt) selected, set IS10= 2 (female) and go to BOX IS11.

ELSE If 4 (son), 6(son-in-law), 8 (stepson), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle) selected, set IS10 = 1 (male) and go to BOX IS11.

If IS9 = 91 or 92, go to IS9a.

Otherwise, GO TO IS10.

---

| **IS9A** | IS9A | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

SPECIFY RELATIONSHIP OF PROXY TO {SP}

**ENTER TEXT**

| | Length | 50 |
|---|---|---|

---

| **IS10** | **is5prxygender** | R5 IS10 PROXY GENDER |
|---|---|---|
| | **op5dgender** | R5 D GENDER UPDATE AND NEW |

**QUESTION TEXT:**

CODE GENDER OF PROXY

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK:  Are you male or female?

**CODES**
1            MALE
2            FEMALE

---

**BOX IS11**            BOX IS11            NOT ON FILE

Write PROXY relationship and gender to PERSON ROSTER.

---

**IS11**            **is5famrrutin**            R5 IS11 FAMILRTY SP DAILY ROUTIN

**DISPLAY INSTRUCTIONS:**

If IS2A=7 (SP DECEASED), display "were" and "in the last month of {his/her} life" and "Were"
Otherwise, display "are" and "Are".

**QUESTION TEXT:**

How familiar {are/were} you with {SP}'s daily routine {in the last month of {his/her} life}?  {Are/Were} you
very familiar, somewhat familiar, a little familiar, or not at all familiar?

**CODES**

1            VERY FAMILIAR
2            SOMEWHAT FAMILIAR
3            A LITTLE FAMILIAR
4            NOT AT ALL FAMILIAR
             REFUSED
             DON'T KNOW

---

**BOX IS11A**            BOX IS11A            NOT ON FILE

If IS2A=7 (DECEASED), go to BOX IS12A.

Else if IS 2=2 (PROXY) and PROXY PERSON'S relationship to SP = 35 or 37-40, go to BOX IS12A.

Otherwise, go to IS11A.

---

**IS11A**            **is5proxlivsp**            R5 IS11A PROXY LIVES W SP
                     **op5prsninhh**            R5 OP IN HOUSEHOLD UPDATE AND NEW

**QUESTION TEXT:**

Do you live here with {SP}?

**CODES**
1            YES
2            NO
             REFUSED

DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
  If IS11A = 1 (YES), set INHOUSEHOLD flag = 1 (YES) for PROXY PERSON.

---

**BOX IS12A**　　　　**BOX IS12A**　　　　NOT ON FILE

If DOB MONTH, DOB DAY, or DOB YEAR is missing for ROSTER MEMBER with PROXY RESP CURRENT INT flag = 1 (YES), go to IS12a.

Otherwise, go to Section RE – Residence.

---

**IS12A**　　　　**op5birthmth (Sensitive)**　　　　R5 OTHER PERSON MONTH OF BIRTH

**DISPLAY INSTRUCTIONS:**
  Display "MONTH" in underline text.

**QUESTION TEXT:**
  What is your date of birth?

  ENTER MONTH

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| Soft Range | 1 to 12 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**
  Display IS12A, IS12B, and IS12c on the same screen.

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**IS12B**　　　　**IS12B**　　　　NOT ON FILE

**DISPLAY INSTRUCTIONS:**
  Display "DAY" in underline text.

**QUESTION TEXT:**
  [What is your date of birth?]

  ENTER DAY

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 31 |
| Soft Range | 1 to 31 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**
  Display IS12A, IS12B, and IS12c on the same screen.

---

**IS12C**　　　　**op5birthyear(Sensitive)**　　　　R5 OTHER PERSON YEAR OF BIRTH

**DISPLAY INSTRUCTIONS:**
  Display "YEAR" in underline text.

**QUESTION TEXT:**
  [What is your date of birth?]

  ENTER YEAR

ENTER NUMBER

        REFUSED
        DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
    Display IS12A, IS12B, and IS12C on the same screen.
    Hard range: CURRENT YEAR - 110.
    Soft range: (CURRENT YEAR - 20) - (CURRENT YEAR - 75).
    If IS12C violates hard range, display error message "YEAR OF BIRTH OUTSIDE OF RANGE.  VERIFY WITH RESPONDENT
    AND RE-ENTER."

    Write birth month, day, and year from IS12a, b, and c to the PERSON ROSTER for roster member.

    If IS12A and IS12B and IS12C <> RF or DK, compute PERSON AGE as (CURRENT DATE - IS12a-c DOB) and prefill
    IS13.

    Otherwise, go to IS14.

---

# IS13

| | |
|---|---|
| **op5age (Sensitive)** | R5 OTH PERSON AGE UPDATE AND NEW |
| **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**
    For "CALCULATED AGE", display age computed at IS12.

**QUESTION TEXT:**
    That makes you {CALCULATED AGE} today.  Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | Section RE |
| 2 | NO | IS12A |
| | REFUSED | Section RE |
| | DON'T KNOW | Section RE |

**PROGRAMMER INSTRUCTIONS:**
    If IS13 = 1 (YES), write PERSON AGE to PERSON ROSTER.
    If IS13 = 2 (NO), display error message, "PLEASE ENTER THE CORRECT DATE."

---

# IS14

| | |
|---|---|
| **op5age (Sensitive)** | R5 OTH PERSON AGE UPDATE AND NEW |
| **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |

**QUESTION TEXT:**
    How old are you?

    ENTER AGE

**ENTER NUMBER**
    Range                            18 to 110
    REFUSED
    DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
    Hard range: 18-110.
    If IS14 violates hard range, display error message "AGE OUTSIDE OF RANGE.  VERIFY WITH
    RESPONDENT AND RE-ENTER."

Write PERSON AGE to PERSON ROSTER.

Go to Section RE – Residence.

| Derived Variables From Items in IS Section | |
|---|---|
| **r5d2intvrage** | R5 D SP CAT AGE AT INTVW |
| **r5dintvwrage (Sensitive)** | R5 D AGE OF SP AT INTERVIEW |
| **is5dproxyid** | R5 D PROXY OPID |
| **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |
| **op5dgender** | R5 D GENDER UPDATE AND NEW |

## RE3             RE3                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If IS2A=7 (SP DECEASED), display "at the time {he/she} died" and "lived".

Otherwise, display "lives".

Display updated IMS Address 1, Address 2, City, State, Zip.

If IS2 A=7 (SP DECEASED) and FACILITY flag = 1 (YES), display preloaded LAST INT Facility name or from IMS if updated.

**QUESTION TEXT:**

> Now I need to confirm {your/SP's} address {at the time {he/she} died}. According to our records, {you live}/{he/she} {lives/lived} at [READ ADDRESS BELOW]
>
> CONFIRM SPELLING
>
> {Facility Name}
> {Address 1}
> {Address 2}
> {City}, {State} {Zip}
>
> IF COMPLETE ADDRESS NOT DISPLAYED, ENTER 2.
>
> [Is that correct?]

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Write confirmed Address 1, Address 2, City, State, and Zip fields to the PERSON ROSTER for SP.
IMS will pull confirmed Address 1, Address 2, City, State, and Zip fields from NHATS Interview Task once task status = 20 (COMPLETE).
If IS2A=7 (SP DECEASED), set DECEASED flag= 1 (YES).

## BOX RE4          BOX RE4                     NOT ON FILE

> If RE3 = 1 (YES), go to BOX RE4F
> Else if RE3 <> 1 (YES) and DECEASED flag = 1 (YES) and LAST INT Facility Name is not blank, go to RE4.
> Otherwise, go to RE4a.

## RE4             RE4                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded SP address and facility name in the question text.

Display preloaded LAST INT facility name.

Display RE4a, 4b, 4c, 4d, and 4e on the same screen.

Display {Address 1}, {Address 2}, {City}, {State}, and {Zip} fields as lighter "grayed-out" text.

Display "facility name" as underlined text.

**QUESTION TEXT:**

> What was {SP}'s facility name at the time {he/she} died?
>
> CONFIRM SPELLING.
>
> IF NO FACILITY NAME, ENTER 95.
>
> {Facility Name}
> {Address 1}
> {Address 2}
> {City}, {State} {Zip}

**ENTER TEXT**

Length                              75

---

# RE4A                    RE4A                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded SP address in the question text.
Display preloaded address line 1 in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 2}, {City}, {State}, and {Zip} fields as lighter "grayed-out" text.
Display "address" as underlined text.

Display preloaded SP address in the question text.

If DECEASED flag = 1 (YES), display "was" and "at the time {he/she} died".
Otherwise, display "is".

**QUESTION TEXT:**

> What {is/was} address {at the time {he/she} died?
>
> CONFIRM SPELLING.
>
> {Address 1}
> {Address 2}
> {City}, {State} {Zip}

**ENTER TEXT**

Length                              50

---

# RE4B                    RE4B                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded SP address in the question text
Display preloaded address line 2 in the response field if available
Display RE4a, 4b, 4c, 4d, and 4e on the same screen
Display {Address 1}, {City}, {State}, and {Zip} fields as lighter "grayed out" text.
Display "address" as underlined text

Display preloaded SP address in the question text.

If DECEASED flag = 1 (YES), display "was" and "at the time {he/she} died".
Otherwise, display "is".

**QUESTION TEXT:**

> [What {is/was} {your/SP's} address {at the time {he/she} died}?]
>
> CONFIRM SPELLING.
>
> IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE.
>
> {Address 1}
> {Address 2}
> {City}, {State} {Zip}

**ENTER TEXT**

Length                                    50

**PROGRAMMER INSTRUCTIONS:**
Allow empty

---

# RE4C                    re5spadrscty (Restricted)        R5 RE4C SP ADDRESS CITY

**DISPLAY INSTRUCTIONS:**
Display preloaded SP address in the question text
Display preloaded city in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 1}, {Address 2}, {State}, and {Zip} fields as lighter "grayed out" text.
Display "city" as underlined text.

Display preloaded SP address in the question text.

If DECEASED flag = 1 (YES), display "was" and "at the time {he/she} died".
Otherwise, display "is".

**QUESTION TEXT:**

> [What {is/was} {your/SP's} city {at the time {he/she} died}?]
>
> CONFIRM SPELLING
>
> {Address 1}
> {Address 2}
> {City}, {State} {Zip}

**ENTER TEXT**

Length                                    25

---

# RE4D                    re5spadrsstt (Restricted)        R5 RE4D SP ADDRESS STATE

**DISPLAY INSTRUCTIONS:**
Display preloaded SP address in the question text
Display preloaded state in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 1}, {Address 2}, {City}, and {Zip} fields as lighter "grayed out" text.
Display "state" as underlined text.

Display preloaded SP address in the question text.

If DECEASED flag = 1 (YES), display "was" and "at the time {he/she} died".
Otherwise, display "is".

**QUESTION TEXT:**

> [What {is/was} {your/SP's} state {at the time {he/she} died}?]
>
> TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND
> PRESS ENTER TO SELECT

```
{Address 1}
{Address 2}
{City}, {State} {Zip}
```

**ENTER TEXT**

Length                                                    2

**PROGRAMMER INSTRUCTIONS:**
Use lookup file (51STATE) of state names.

---

**RE4E**            RE4E                        NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display preloaded SP address in the question text
Display preloaded zip code in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 1}, {Address 2}, {City}, and {Zip} fields as lighter "grayed out" text.
Display "zip code" as underlined text.

Display preloaded SP address in the question text.

If DECEASED flag = 1 (YES), display "was" and "at the time {he/she} died".
Otherwise, display "is".

**QUESTION TEXT:**
```
[What {is/was} {your/SP's} zip code {at the time {he/she} died}?]

ENTER A 5-DIGIT ZIP CODE

{Address 1}
{Address 2}
{City}, {State} {Zip}
```

**ENTER TEXT**

Length                                                    5

**PROGRAMMER INSTRUCTIONS:**
5-digit entry required. If less than 5 digits entered, display ErrorMessage #11.

Write updated Address 1, Address 2, City, State, and Zip fields to the PERSON ROSTER for SP.
IMS will pull updated Address 1, Address 2, City, State, and Zip fields from NHATS Interview Task once task status = 20 (COMPLETE).

---

**BOX RE4F**        BOX RE4F                    NOT ON FILE

If NEWSAMPLE flag = 1 (YES), set NEW RESIDENCE flag = 1 (YES), and go to RE5.
Else if LAST INT DISP CODE = 64 (FQ ONLY) and DECEASED flag <> 1 (YES), set NEW RESIDENCE flag = 1 (YES) and go to RE5.
Otherwise, go to RE4f.

---

**RE4F**            re5spadrsnew                R5 RE4F SP ADDRESS SAME OR DIFF

**DISPLAY INSTRUCTIONS:**
If DECEASED FLAG = 1 (YES), display "DIED", "{Facility Name}, "was", "at the time {he/she} died", "{he/she} was", and

("," FACILITY NAME" if FACILITY NAME <> 95).
Otherwise, display "is", "now", and "LIVES".

Display current and last address fields in 2 columns.

For CURRENT ADDRESS, display updated Facility Name, Address 1, Address 2, City, State, and Zip fields from RE4a-e.

For LAST ADDRESS, display preloaded LAST INT Facility Name, LAST INT Address 1, LAST INT Address 2, LAST INT City, LAST INT State, and LAST INT Zip fields.

Display "INCLUDING A DIFFERENT APT # OR UNIT #." as underlined text.

**QUESTION TEXT:**

SPECIFY IF SP {LIVES/DIED} AT SAME ADDRESS AS LAST INTERVIEW:

| CURRENT ADDRESS: | ADDRESS AT LAST INTERVIEW: |
|---|---|
| {Facility Name} | {LAST INT Facility Name} |
| {Address 1} | {LAST INT Address 1} |
| {Address 2} | {LAST INT Address 2} |
| {City}, {State} {Zip} | {LAST INT City}, {LAST INT State} {LAST INT Zip} |

IF NEEDED: Is the place {you are/SP {is/was}} living {now/at the time {he/she} died} the same place that {you were/{he/she} was} living at the time of the last interview?

ENTER 1 IF SAME ADDRESS.
ENTER 2 IF DIFFERENT ADDRESS, INCLUDING A DIFFERENT APT# OR UNIT #.

ENTER 3 IF SAME ADDRESS WITH MINOR ADDRESS CORRECTIONS (SPELLING, ZIP CODE{, FACILITY NAME})

**CODES**

| | |
|---|---|
| 1 | YES, SAME ADDRESS |
| 2 | NO, DIFFERENT ADDRESS |
| 3 | YES, SAME ADDRESS WITH MINOR CORRECTIONS |

**PROGRAMMER INSTRUCTIONS:**

If RE4f = 2 (DIFFERENT ADDRESS), set NEW RESIDENCE flag = 1 (YES).

If [RE4f = 1 (SAME ADDRESS) or 3 (SAME ADDRESS WITH CORRECTIONS)], set HOTYPE flag = LAST INT HOTYPE flag.

If [RE4f = 1 (SAME ADDRESS) or 3 (SAME ADDRESS WITH CORRECTIONS)] and LAST INT FACILITY flag = 1 (YES), set FACILITY flag = 1 (YES).

If [RE4f = 1 (SAME ADDRESS) or 3 (SAME ADDRESS WITH CORRECTIONS)] and LAST INT RETIREMENT COMMUNITY flag = 1 (YES), set RETIREMENT COMMUNITY flag = 1 (YES).

| **BOX RE5** | **BOX RE5** | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

If DECEASED flag = 1 (YES) and RE4f = 2 (DIFFERENT ADDRESS), go to BOX RE10.

Else if DECEASED flag = 1 (YES), go to RE12.

Otherwise, go to RE5.

**RE5**                    RE5                    NOT ON FILE

**QUESTION TEXT:**

Is this {your/SP's} mailing address?

**CODES**

| | | |
|---|---|---|
| 1 | YES | RE7 |
| 2 | NO | |
| | REFUSED | RE7 |
| | DON'T KNOW | RE7 |

---

**RE6A**                    RE6A                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display "address" as underlined text.

**QUESTION TEXT:**

What is {your/SP's} mailing address?

CONFIRM SPELLING

**ENTER TEXT**

Length                    50

---

**RE6B**                    RE6B                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display "address" as underlined text.

**QUESTION TEXT:**

[What is {your/SP's} mailing address?]

CONFIRM SPELLING

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

**ENTER TEXT**

Length                    50

**PROGRAMMER INSTRUCTIONS:**

Allow empty

---

**RE6C**                    RE6C                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display "city" as underlined text.

**QUESTION TEXT:**

[What is {your/SP's} mailing city?]

CONFIRM SPELLING

**ENTER TEXT**

Length                    25

---

**RE6D**                      RE6D                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display "state" as underlined text.

**QUESTION TEXT:**

[What is {your/SP's} mailing state?]

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATED STATE, AND
PRESS ENTER TO SELECT

**ENTER TEXT**
Length                          2

**PROGRAMMER INSTRUCTIONS:**
Use lookup file (51 STATE) of state names.

---

**RE6E**                      RE6E                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display "zip code" as underlined text.

**QUESTION TEXT:**

[What is {your/SP's} mailing zip code?]

ENTER A 5-DIGIT ZIP CODE

**ENTER TEXT**
Length                          5

**PROGRAMMER INSTRUCTIONS:**
5-digit entry required.  If less than 5 digits entered, display Error Message #11.

---

**RE7**                      re5intplace                    R5 RE7 SP INT AT PLACE OF RES

**DISPLAY INSTRUCTIONS:**
For CURRENT ADDRESS, display updated Facility Name, Address 1, Address 2, City, State, and Zip fields from
RE4a-e.

**QUESTION TEXT:**

SPECIFY IF INTERVIEW IS BEING CONDUCTED AT SP'S PLACE OF RESIDENCE.

CURRENT ADDRESS:
{Facility Name}
{Address 1}
{Address 2}
{City}, {State} {Zip}

IF NEEDED ASK: Is this address where {you are/SP is} currently living?

**CODES**
1              YES
2              NO

**PROGRAMMER INSTRUCTIONS:**
If RE7 = 1 (YES), set INT AT PLACE OF RESIDENCE flag = 1 (YES).

## BOX RE8

**BOX RE8**                                    NOT ON FILE

**QUESTION TEXT:**

If NEW RESIDENCE flag <> 1 (YES), set CURRENT INT STRUCTURE flag = LAST INT STRUCTURE flag, and go to Section HC – HEALTH CONDITIONS.

Otherwise, go to RE8.

## RE8

**re5newstrct**                               R5 RE8 NEW RESID PHYS STRUC IN R2

**re5dresistrct**                             R5 D RESIDNCE PHYSICAL STRUCTUR

**DISPLAY INSTRUCTIONS:**

If INT AT PLACE OF RESIDENCE FLAG = 1 (YES), display "CODE PHYSICAL STRUCTURE OF SP'S RESIDENCE." and "IF SP OCCUPIES ONE ROOM OF A FREE-STANDING OR ATTACHED SINGLE HOUSE, SELECT THE CODE THAT DESCRIBES THE OVERALL PHYSICAL STRUCTURE."

Otherwise, display "SHOWCARD RE1" and "Which of these best describes the physical structure of the building where {you live/SP lives}?".

**QUESTION TEXT:**

{SHOWCARD RE1}

{CODE PHYSICAL STRUCTURE OF SP'S RESIDENCE./Which of these best describes the physical structure of the building where {you live/SP lives}?}

{IF SP OCCUPIES ONE ROOM OF A FREE-STANDING OR ATTACHED SINGLE HOUSE, SELECT THE CODE THAT DESCRIBES THE OVERALL PHYSICAL STRUCTURE.}

**CODES**

| | | |
|---|---|---|
| 1 | FREE-STANDING (DETACHED) SINGLE HOUSE | BOX RE10 |
| 2 | SINGLE HOUSE BUT ATTACHED TO OTHERS (ROW HOUSE, TOWNHOUSE, DUPLEX, TRIPLEX, OR TRIPLE DECKER | BOX RE10 |
| 3 | MOBILE HOME OR TRAILER | BOX RE10 |
| 4 | MULTI-UNIT (2+) BUILDING | RE9 |
| 91 | OTHER (SPECIFY) | |

**PROGRAMMER INSTRUCTIONS:**

If 1, 2, or 3 is selected set CURRENT INT STRUCTURE flag=1 (HOUSE) and use display text of "home"
Else if 4 is selected set CURRENT INT STRUCTURE flag=2 (MULTI-UNIT) and use display text of "building"
Else if 91 is selected set CURRENT INT STRUCTURE flag=3 (OTHER) and use display text of "building"
IF RE1 = 91 (OTHER), display soft error message "YOU HAVE SELECTED OTHER TYPE OF STRUCTURE. SELECT THE STRUCTURE THAT LOOKS MOST LIKE SP'S RESIDENCE:
CODE 1 "FREE-STANDING (DETACHED) SINGLE HOUSE"
CODE 2 "SINGLE HOUSE BUT ATTACHED TO OTHERS"
CODE 3 "MOBILE HOME OR TRAILER"
CODE 4 "MULTI-UNIT (2+) BUILDING"

## RE8A

**RE8A**                                        NOT ON FILE

**QUESTION TEXT:**

SPECIFY TYPE OF STRUCTURE

**ENTER TEXT**

Length                                          25

## RE9

**re5newblgfl**                                R5 RE9 NEW RESID BLDG FLOORS IN R5

<div align="center">**re5dbldg**</div>                    R5 D SP BLDG MORE THAN ONE FLOOR

**DISPLAY INSTRUCTIONS:**

If INT AT PLACE OF RESIDENCE FLAG = 1 (YES), display "CODE NUMBER OF FLOORS OF STRUCTURE".

Otherwise, display "Does the building where {you live/SP lives/SP was living at the time {he/she} died} have one floor or more than one floor?"

**QUESTION TEXT:**

{CODE NUMBER OF FLOORS OF STRUCTURE/Does the building where {you live/SP lives} have one floor or more than one floor?}

**CODES**

| | |
|---|---|
| 1 | BUILDING HAS ONE FLOOR |
| 2 | BUILDING HAS MULTIPLE FLOORS |

---

**BOX RE10**          BOX RE10          NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to section HC – Health Conditions.

Else if LAST INT DISP CODE = 64 (FQ ONLY) and DECEASED flag <> 1 (YES), go to Section HC – Health Conditions.

Else if NEW RESIDENCE flag = 1 (YES), go to RE10.

Else if DECEASED flag = 1 (YES), go to RE11.

Otherwise, go to Section HC – Health Conditions.

---

**RE10**          **re5mthmove**          R5 RE10 MONTH MOVED NEW ADDRESS

**QUESTION TEXT:**

In what month and year since {LAST INT MONTH AND YEAR}, did {SP} move to {Address 1}, {City}, {State} {Zip}?

ENTER MONTH

**CODES**

| | | |
|---|---|---|
| 1 | JANUARY | |
| 2 | FEBRUARY | |
| 3 | MARCH | |
| 4 | APRIL | |
| 5 | MAY | |
| 6 | JUNE | |
| 7 | JULY | |
| 8 | AUGUST | |
| 9 | SEPTEMBER | |
| 10 | OCTOBER | |
| 11 | NOVEMBER | |
| 12 | DECEMBER | |
| | REFUSED | BOX RE11 |
| | DON'T KNOW | BOX RE11 |

---

**RE10B**          **re5yearmove**          R5 RE10B YEAR MOVED NEW ADDRESS

**QUESTION TEXT:**

In what month and year since {LAST INT MONTH AND YEAR}, did {SP} move to {Address 1}, {City}, {State} {Zip}?

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

    REFUSED
    DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

    Soft Range:  CURRENT YEAR-1 to CURRENT YEAR

    Hard Range: R1 INT YEAR to CURRENT YEAR

    Combined month and year cannot be before date of last interview.  If date is before date of last interview, display error message #15.

---

| BOX RE11 | BOX RE11 | NOT ON FILE |
|----------|----------|-------------|

If DECEASED flag = 1 (YES), go to RE11.

Otherwise, go to Section HC – Health Conditions.

---

| RE11 | re5placedec | R5 RE11 CARE AT PLACE SP DIED |
|------|-------------|-------------------------------|

**QUESTION TEXT:**

Was this the kind of place that provides care, such as an assisted living facility, board and care home, nursing home, or other long term care facility?

**CODES**

| 1 | YES |
|---|-----|
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

    If RE11 = 1 (YES), set FACILITY flag = 1 (YES).

---

| RE12 | re5alonedec | R5 RE12 LIVED ALONE AT DEATH |
|------|-------------|------------------------------|

**QUESTION TEXT:**

At the time of {SP}'s death, was {he/she} living alone?

**CODES**

| 1 | YES |
|---|-----|
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

    Go to Section PD – Place of Death.

---

| Derived Variables from items in RE Section | |
|---|---|
| **re5dcensdiv** | R5 D SP CENSUS DIVISION |
| **re5dresistrct** | R5 D RESIDNCE PHYSICAL |
| **re5dbldg** | R5 D SP BLDG MORE THAN ONE FLOOR |

| Flag Variables Set in RE Section | |
|---|---|
| **fl5structure** | R5 F RE STRUCTURE OF SP DWELLING |
| **fl5resnew** | R5 F RE NEW ADDRESS FROM PRIOR ROUND |
| **fl5facility** | R5 F RE ROUTING FLAG FROM RE4f HT3 5 6 7 |
| **fl5hotype** | R5 F RE HT TYPE OF HOME |
| **fl5retirecom** | R5 F RE HT SP LIVES IN RETIREMT COM |

**HC1PRE**                    **HC1PRE**                    NOT ON FILE

**QUESTION TEXT:**

Let's start with some questions about {your/SP's} health.

PRESS 1 AND ENTER TO CONTINUE

---

**HC1**                    **hc5health**                    R5 HC1 OVERALL HEALTH CONDITION

**QUESTION TEXT:**

Would you say that in general {your/SP's} health is excellent, very good, good, fair, or poor?

**CODES**

| | |
|---|---|
| 1 | EXCELLENT |
| 2 | VERY GOOD |
| 3 | GOOD |
| 4 | FAIR |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

---

**HC2**          **hc5disescn1**          R5 HC2 SP HAD HEART ATTACK

                 **hc5disescn2**          R5 HC2 SP HAS HEART DISEASE

                 **hc5disescn3**          R5 HC2 SP HAS HIGH BLOOD PRESS

                 **hc5disescn4**          R5 HC2 SP HAS ARTHRITIS

                 **hc5disescn5**          R5 HC2 SP HAS OSTEOPOROSIS

                 **hc5disescn6**          R5 HC2 SP HAS DIABETES

                 **hc5disescn7**          R5 HC2 SP HAS LUNG DISEASE

                 **hc5disescn8**          R5 HC2 SP HAD STROKE

                 **hc5disescn9**          R5 HC2 SP HAS DEMENTIA OR ALZH

                 **hc5disescn10**         R5 HC2 SP HAS CANCER

**DIPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at HC2a, do not display question text in brackets.
Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1 (YES), display "I will read a list of some diseases and conditions that a doctor may have said {you have/SP has}. Please tell me if a doctor ever"

Otherwise, display "We are interested in new health conditions that {you have/SP has} learned about this year.

Since the time of the last interview in {LAST INT MONTH AND YEAR}, has a doctor''.

If LAST INT HC2b, c, d, e, f, g, or i = 1 (YES), do not display corresponding item.

Always display HC2a, HC2h, and HC2j.

**QUESTION TEXT:**

{[}{We are interested in new health conditions that {you have/SP has} learned about this year. Since the time of the last interview in {LAST INT MONTH AND YEAR}, has a doctor/I will read a list of some diseases and conditions that a doctor may have said {you have/SP has}.  Please tell me if a doctor ever} told {you/him/her} that {you/he/she} had{]}

{variable text [a-j]}

RESPONSE [1] a. a heart attack or myocardial infarction?
RESPONSE [2] b. any heart disease including angina or congestive heart failure?
RESPONSE [3] c. high blood pressure or hypertension?
RESPONSE [4] d. arthritis (including osteo or rheumatoid arthritis)?
RESPONSE [5] e. osteoporosis or thinning of the bones?
RESPONSE [6] f. diabetes?
RESPONSE [7] g. lung disease, such as emphysema, asthma, or chronic bronchitis?
RESPONSE [8] h. a stroke?
RESPONSE [9] i. dementia or Alzheimer's Disease?
RESPONSE [10] j. cancer

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| 7 | PREVIOUSLY REPORTED |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-j sequence until all rows have been displayed.

Do not display response code 7 (PREVIOUSLY REPORTED).

---

| **BOX HC3** | **BOXHC3** | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

If HC2j = 1 (YES,CANCER), go to HC3.
Otherwise, go to BOX HC4.

---

| **HC3** | **hc5cancerty1** | R5 HC3 SP HAD SKIN CANCER |
|---|---|---|
| | **hc5cancerty2 (Sensitive)** | R5 HC3 SP HAD BREAST CANCER |
| | **hc5cancerty3 (Sensitive)** | R5 HC3 SP HAD PROSTATE CANCER |
| | **hc5cancerty4 (Sensitive)** | R5 HC3 SP HAD BLADDER CANCER |
| | **hc5cancerty5 (Sensitive)** | R5 HC3 SP HAD CRV OVRN UTRN CNCR |
| | **hc5cancerty6 (Sensitive)** | R5 HC3 SP HAD COLON CANCER |

|                              |                                    |
|------------------------------|------------------------------------|
| **hc5cancerty7 (Sensitive)** | R5 HC3 SP HAD KIDNEY CANCER        |
| **hc5cancerty8 (Sensitive)** | R5 HC3 SP HAD OTHER CANCER         |

**DISPLAY INSTRUCTIONS:**

If IS4=1 (SP is male), display "prostate cancer," and response code 3.

**QUESTION TEXT:**

Was that skin cancer, breast cancer, {prostate cancer,} or some other type?

SELECT ALL THAT APPLY

| CODES | Code All That Apply |  |
|-------|---------------------|--|
| 1  | SKIN CANCER                        | BOX HC4 |
| 2  | BREAST CANCER                      | BOX HC4 |
| 3  | {PROSTATE CANCER}                  | BOX HC4 |
| 4  | BLADDER CANCER                     | BOX HC4 |
| 5  | CERVICAL/OVARIAN/UTERINE CANCER    | BOX HC4 |
| 6  | COLON CANCER                       | BOX HC4 |
| 7  | KIDNEY CANCER                      | BOX HC4 |
| 91 | OTHER TYPE OF CANCER (SPECIFY)     |         |
|    | REFUSED                            | BOX HC4 |
|    | DON'T KNOW                         | BOX HC4 |

**PROGRAMMER INSTUCTIONS:**

Allow code all that apply

---

## HC3B

| HC3B | NOT ON FILE |
|------|-------------|

**QUESTION TEXT:**

SPECIFY TYPE OF CANCER

IF NEEDED: What type of cancer was this?

**ENTER TEXT**

| | |
|------------|----|
| Length     | 25 |
| REFUSED    |    |
| DON'T KNOW |    |

---

## HC5

|                  |                                    |
|------------------|------------------------------------|
| **hc5brokebon1** | R5 HC5A SP BROKEN OR FRACT HIP     |
| **hc5brokebon2** | R5 HC5B SP OTHR BRKN FRACT BONE    |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

If at HC5a, do not display question text in brackets.
Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1(YES), display "Since age 50"
Otherwise, display "Since the time of the last interview in {LAST INT MONTH AND YEAR}".

**QUESTION TEXT:**

{[}{Since the time of the last interview in {LAST INT MONTH AND YEAR}/ Since age 50}, has a doctor told

{you/SP} that {you/he/she} had{[]}

{variable text [a-b]}

RESPONSE [1] a. a broken or fractured hip?
RESPONSE [2] b. other broken or fractured bones?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-b sequence until all rows have been displayed.

---

| **BOX HC6** | BOX HC6 | NOT ON FILE |
|---|---|---|

If NEWSAMPLE flag = 1 (YES), go to HC6.
Otherwise, go to HC7.

---

| **HC6** | hc5serdisill | R5 HC6 SP OTHR SER DIS ILLNES |
|---|---|---|

**QUESTION TEXT:**

Is there another serious disease or illness that I have not asked about that a doctor has told {you/SP} that {you have/{he/she} has}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC7 |
| | REFUSED | HC7 |
| | DON'T KNOW | HC7 |

---

| **HC6A** | HC6A | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

What is that (serious disease or illness)?

**ENTER TEXT**

| | | |
|---|---|---|
| Length | | 75 |
| REFUSED | | |
| DON'T KNOW | | |

**PROGRAMMER INSTRUCTIONS:**

Field length 75.

---

| **HC7** | hc5hosptstay | R5 HC7 SP HOSP STAY LAST 12MOS |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "within the last 12 months, that is since {CURRENT MONTH AND YEAR – 1 YEAR}".
Otherwise, display "since the time of the last interview in {LAST INT MONTH AND YEAR}

Display "last 12 months" in bold underlined text.

**QUESTION TEXT:**

{Have you/Has SP} had an overnight hospital stay since the time of the last interview in {LAST INT MONTH AND YEAR}/within the last 12 months, that is since {CURRENT MONTH AND YEAR - 1 YEAR}}?

**CODE**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC9PRE |
| | REFUSED | HC9PRE |
| | DON'T KNOW | HC9PRE |

**PROGRAMMER INSTRUCTIONS:**

Display month as word.

---

# HC8  hc5hosovrnht  R5 HC8 SP NUM OF HOSP STAYS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "(in the last 12 months)".
Otherwise, display "since the time of the last interview in {LAST INT MONTH AND YEAR}".

Display "last 12 months" in bold underlined text.

**QUESTION TEXT:**

How many separate overnight hospital stays {have you/has SP} had {(in the last 12 months)/ since the time of the last interview in {LAST INT MONTH AND YEAR}? By hospital stay, we mean a time when {you/SP} stayed at least one night in the hospital.

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 365 |
| Soft Range | 1 to 12 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Numeric field length 3.
Hard range 1-365
Soft range 1-12

---

# HC9PRE  HC9PRE  NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag <> 1 (YES), display "since the time of the last interview in {LAST IN MONTH AND YEAR}".
Otherwise, use null display.

**QUESTION TEXT:**

Next I have a few questions about any types of surgery {you/SP} may have had{ since the time of the last interview in {LAST INT MONTH AND YEAR}}.

Press 1 AND ENTER TO CONTINUE

---

**BOX HC9**                    **BOXHC9**                    NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HC9A.
Otherwise, go to HC9B.

---

**HC9A**                    **hc5kneesurg**                    R5 HC9A HAD KNEE SURGERY

**QUESTION TEXT:**

{Have you/Has SP} ever had any of the following types of surgery?

IF NEEDED:  Knee surgery includes knee repair or replacement.

Knee repair or replacement?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC10A |
| | REFUSED | HC10A |
| | DON'T KNOW | HC10A |

---

**HC9B**                    **hc5knesrgyr**                    R5 HC9B KNEE SURGERY IN 12 MNTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR – 1 YEAR}".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

 Spell out month name in question text.

**QUESTION TEXT:**

{Since {LAST INT MONTH AND YEAR}/In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR - 1 YEAR}}, did {you/SP} have knee surgery?

IF NEEDED:  Knee surgery includes knee repair or replacement.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOXHC9c**                    **BOXHC9c**                    NOT ON FILE

If NEWSAMPLE flag= 1 (YES), go to HC9C.
Otherwise, go to HC10B.

---

**HC9C**                    **hc5ageknesur**                    R5 HC9C AGE AT LAST KNEE SURGERY

**QUESTION TEXT:**

How old {were you/was SP} the last time {you/he/she} had knee repair or replacement surgery?

IF NEEDED: If you are not sure, just give me your best guess.

ENTER AGE

**ENTER NUMBER**

Range 18 to 110
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range 18-110
Compare age entry to SP's calculated age today. If age entry>SP's current age, display error message "CONFIRM RESPONSE. AGE ENTERED IS GREATER THAN SP'S CURRENT AGE".

---

## HC10A  hc5hipsurg  R5 HC10A HIP REPAIR OR REPLACMNT

**QUESTION TEXT:**

[{Have you/Has SP} ever had] hip repair or replacement surgery?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC11A |
| | | HC11A |
| | REFUSED | HC11A |
| | DON'T KNOW | |

---

## HC10B  hc5hipsrgyr  R5 HC10B HIP SURG IN 12 MNTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR – 1 YEAR}".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Spell out month name in question text.

**QUESTION TEXT:**

Did {you/SP} have hip surgery in the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR - 1 YEAR}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOXHC10C  BOXHC10C  NOT ON FILE

If NEWSAMPLE flag= 1 (YES), go to HC10C.
Otherwise, go to HC11B.

## HC10C      hc5agehipsur      R5 HC10C AGE AT LAST HIP SURGERY

**QUESTION TEXT:**

How old {were you/was SP} the last time {you/he/she} had hip repair or replacement surgery?

IF NEEDED:  If you are not sure, just give me your best guess.

ENTER AGE

**ENTER NUMBER**

|  |  |
|---|---|
| Range | 40 to 110 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range 40-110
Compare age entry to SP's calculated age today.  If age entry>SP's current age, display error message "CONFIRM RESPONSE. AGE ENTERED IS GREATER THAN SP'S CURRENT AGE".

## HC11A      hc5catarsurg      R5HC11A HAD CATARACT SURGERY

**QUESTION TEXT:**

[{Have you/Has SP} ever had] cataract surgery?

**CODES**

| 1 | YES | |
|---|---|---|
| 2 | NO | HC12A |
| | REFUSED | HC12A |
| | DON'T KNOW | HC12A |

## HC11B      hc5catrsrgyr      R5 HC11B CATER SURG IN 12 MNTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR – 1 YEAR}".

Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Spell out month name in question text.

**QUESTION TEXT:**

{Since {LAST INT MONTH AND YEAR}/In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR - 1 YEAR}}, did {you/SP} have cataract surgery?

**CODES**

| 1 | YES |
|---|---|

2              NO
                       REFUSED
                       DON'T KNOW

---

**BOXHC11C**                **BOXHC11C**                NOT ON FILE

If NEWSAMPLE flag= 1 (YES), go to HC11C.
Otherwise, go to HC12B.

---

# HC11C                     **hc5agecatsur**           R5 HC11C AGE AT LAST CATRCT SURG

**QUESTION TEXT:**

How old {were you/was SP} the last time {you/he/she} had cataract surgery?

IF NEEDED:  If you are not sure, just give me your best guess.

ENTER AGE

**ENTER NUMBER**

                       Range                        40 to 110
                       REFUSED
                       DON'T KNOW

**PROGRAMMER INSTRUCTIONS**

Range 40-110
Compare age entry to SP's calculated age today.  If age entry>SP's current age, display error message
"CONFIRM RESPONSE.  AGE ENTERED IS GREATER THAN SP'S CURRENT AGE".

---

# HC12A                     **hc5bckspnsur**           R5 HC12A HAD BACK OR SPINE SURGR

**QUESTION TEXT:**

[{Have you/Has SP} ever had] back or spine surgery?

**CODES**

        1              YES
        2              NO                            HC13A
                       REFUSED                       HC13A
                       DON'T KNOW                    HC13A

---

# HC12B                     **hc1backsrgyr**           R1 HC12B BCK SPNE SURGR 12 MNTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR – 1 YEAR}".

Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Spell out month name in question text.

**QUESTION TEXT:**

{Since {LAST INT MONTH AND YEAR}/In the last 12 months, that is since {CURRENT MONTH,

DAY, AND YEAR - 1 YEAR}}, did {you/SP} have back or spine surgery?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

**BOXHC12C**         **BOXHC12C**              NOT ON FILE

If NEWSAMPLE flag= 1 (YES), go to HC12C.
Otherwise, go to HC13B.

---

**HC12C**              **hc5agebcksrg**            R5 HC12C AGE AT LAST BACK SURGRY

**QUESTION TEXT:**

How old {were you/was SP} the last time {you/he/she} had back or spine surgery?

IF NEEDED:  If you are not sure, just give me your best guess.

ENTER AGE

**ENTER NUMBER**

| | | |
|---|---|---|
| Range | | 20 to 110 |
| REFUSED | | |
| DON'T KNOW | | |

**PROGRAMMER INSTRUCTIONS**

Range 20-110
Compare age entry to SP's calculated age today.  If age entry>SP's current age, display error message
"CONFIRM RESPONSE.  AGE ENTERED IS GREATER THAN SP'S CURRENT AGE".

---

**HC13A**              **hc5heartsurg**            R5 HC13A HAD HEART SURGERY

**QUESTION TEXT:**

[{Have you/Has SP} ever had] heart surgery of any kind, including a bypass, valve surgery or a stent?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC14PRE |
| | REFUSED | HC14PRE |
| | DON'T KNOW | HC14PRE |

---

**HC13B**              **hc5hartsrgyr**            R5 HC13B HEART SURGERY 12 MONTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR – 1 YEAR}".

Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Spell out month name in question text.

**QUESTION TEXT:**

{Since {LAST INT MONTH AND YEAR}/In the last 12 months, that is since {CURRENT MONTH, DAY, AND YEAR - 1 YEAR}}, did {you/SP} have heart surgery?

IF NEEDED: Heart surgery includes a bypass, valve surgery, pacemaker, or a stent.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOXHC13C  **BOXHC13C**  NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HC13C.
Otherwise, go to HC14PRE.

---

## HC13C  **hc5agehrtsrg**  R5 HC13C AGE LAST HEART SURGERY

**QUESTION TEXT:**

How old {were you/was SP} the last time {you/he/she} had heart surgery?

IF NEEDED: If you are not sure, just give me your best guess.

ENTER AGE

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 110 |
| Soft Range | 20 to 80 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS**

Hard range 1-110
Soft range 20-80
Compare age entry to SP's calculated age today. If age entry>SP's current age, display error message "CONFIRM RESPONSE. AGE ENTERED IS GREATER THAN SP'S CURRENT AGE."

---

## HC14PRE  **HC14PRE**  NOT ON FILE

**QUESTION TEXT:**

These next few questions are about falling down. By falling down we mean any fall, slip, or trip in which you lose your balance and land on the floor or ground or at a lower level.

PRESS 1 AND ENTER TO CONTINUE

---

## HC14  **hc5fllsinmth**  R5 HC14 FALL DOWN IN LAST MONTH

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

In the last month, {have you/has SP} fallen down?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HC15      hc5worryfall      R5 HC15 WORRIED ABOT FALLING DOWN

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} worry about falling down?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX HC17 |
| | REFUSED | BOX HC17 |
| | DON'T KNOW | BOX HC17 |

---

## HC16      hc5worrylimt      R5 HC16 WORRY EVR LIMT ACTIVTIES

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

In the last month, did this worry ever limit {your/SP's} activities?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX HC17      BOX HC17      NOT ON FILE

**QUESTION TEXT:**

If HC14 = 1 (YES), go to HC18.
Otherwise, go to HC17.

---

## HC17      hc5faleninyr      R5 HC17 FALLEN DOWN IN 12 MONTHS

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

**QUESTION TEXT:**

{In the last 12 months/Since {LAST INT MONTH AND YEAR} {have you/has SP} fallen down?

IF NEEDED: By falling down we mean any fall, slip, or trip in which you lose your balance and land on the floor or ground or at a lower level.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HC19 |
| | REFUSED | HC19 |
| | DON'T KNOW | HC19 |

---

## HC18         hc5multifall         R5 HC18 FALLEN DWN MORE THN ONCE

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last 12 months".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Display "last 12 months" in bold underlined text.

**QUESTION TEXT:**

{In the last 12 months/Since {LAST INT MONTH AND YEAR} {have you/has SP} fallen down more than one time?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HC19         hc5depresan1         R5 HC19A SP LITTLE INTERST PLEAS

                        hc5depresan2         R5 HC19B SP DOWN DEPRES HOPELESS

                        hc5depresan3         R5 HC19C SP NERVOUS ANXIOUS

                        hc5depresan4         R5 HC19D SP UNABLE TO STOP WORRY

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at HC19a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

SHOW CARD HC1

{[]}Over the last month, how often {have you/has SP} {[]}

{variable text [a-d]}

RESPONSE [1] a. had little interest or pleasure in doing things?
RESPONSE [2] b. felt down, depressed, or hopeless?
RESPONSE [3] c. felt nervous, anxious, or on edge?
RESPONSE [4] d. been unable to stop or control worrying?

{[]}Not at all, several days, more than half the days, or nearly every day?{[]}

**CODES**

|   |   |
|---|---|
| 1 | NOT AT ALL |
| 2 | SEVERAL DAYS |
| 3 | MORE THAN HALF THE DAYS |
| 4 | NEARLY EVERY DAY |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

---

## HC20PRE       HC20PRE                    NOT ON FILE

**QUESTION TEXT:**

> The next few questions are about how {you have/SP has} been sleeping.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## HC20       hc5aslep30mn          R5 HC20 OVER 30 MIN FALL ASLEEP

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

> SHOW CARD HC2
>
> In the last month how often did it take {you/SP} more than 30 minutes to fall asleep? Would you say every night, most nights, some nights, rarely, or never?

**CODES**

|   |   |
|---|---|
| 1 | EVERY NIGHT (7 NIGHTS A WEEK) |
| 2 | MOST NIGHTS (5-6 NIGHTS A WEEK) |
| 3 | SOME NIGHTS (2-4 NIGHTS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
|   | REFUSED |
|   | DON'T KNOW |

---

## HC21       hc5trbfalbck          R5 HC21 TROBLE FALLNG BCK ASLEEP

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

> SHOW CARD HC3
>
> (In the last month) on nights when {you/SP} woke up before {you/he/she} wanted to get up, how often did {you/he/she} have trouble falling back asleep?  Would you say every night, most nights, some nights, rarely, or never?

| | |
|---|---|
| 1 | EVERY NIGHT |
| 2 | MOST NIGHTS |
| 3 | SOME NIGHTS |
| 4 | RARELY |
| 5 | NEVER |
| 7 | DON'T WAKE UP/NOT A PROBLEM |
| | REFUSED |
| | DON'T KNOW |

---

## HC22      hc5sleepmed      R5 HC22 OFTN MEDICATE HELP SLEEP

**DISPLAY INSTRUCTIONS:**

Display "last month" in bold underlined text.

**QUESTION TEXT:**

SHOW CARD HC3

(In the last month) how often did {you/SP} take medication to help {you/him/her} sleep? Would you say every night, most nights, some nights, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY NIGHT (7 NIGHTS A WEEK) |
| 2 | MOST NIGHTS (5-6 NIGHTS A WEEK) |
| 3 | SOME NIGHTS (2-4 NIGHTS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
Go to Section HT – HOUSING TYPE

---

## BOX HT1      BOX HT1      NOT ON FILE

If NEWSAMPLE flag=1(YES), go to HT1PRE.

Else if NEW RESIDENCE flag = 1 (YES), go to BOX HT3.

Otherwise, go to Section SE – Service Environment.

## HT1PRE      HT1PRE      NOT ON FILE

Now, let's talk about the place {you live/SP lives}.

PRESS 1 AND ENTER TO CONTINUE

## HT1      ht5longlived      R5 HT1 HOW LONG LIVED THERE

**DISPLAY INSTRUCTIONS:**

Display preloaded IMS street address 1 and address 2 or from RE4a and RE4b if address updated..

**QUESTION TEXT:**

About how long {have you/has SP} lived at { STREET ADDRESS 1 AND STREET ADDRESS 2 }?

INDICATE RESPONSE UNIT

**CODES**

| | | |
|---|---|---|
| 1 | MONTHS | |
| 2 | YEARS | HT1B |
| | REFUSED | HT2 |
| | DON'T KNOW | HT2 |

## HT1A      ht5mthslived      R5 HT1A MNTHS IF LESS THAN 1 YR

**QUESTION TEXT:**

ENTER NUMBER OF MONTHS LIVED AT ADDRESS IF LESS THAN 1 YEAR

ENTER ZERO IF LESS THAN 1 MONTH

**ENTER NUMBER**

     Range      0 to 11

**PROGRAMMER INSTRUCTIONS:**

Range 0-11

Go to Box HT3

## HT1B      ht5yrslived      R5 HT1B YEARS LIVED AT ADDRESS

**QUESTION TEXT:**

> ENTER NUMBER OF YEARS LIVED AT ADDRESS

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 110 |
| Soft Range | 1 to 50 |

**PROGRAMMER INSTRUCTIONS:**

Hard range 1-110
Soft range 1-50

Go to Box HT3

---

# HT2                 ht5longer5yr                 R5 HT2 LIVED HERE 5 YRS OR LNGER

**DISPLAY INSTRUCTIONS:**

Display preloaded street address 1 and address 2 or from RE4a and RE4b if address updated.

**QUESTION TEXT:**

> {Have you/Has SP} lived at { STREET ADDRESS 1 AND STREET ADDRESS 2 } for 5 years or longer?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# BOX HT3                 BOX HT3                 NOT ON FILE

> If RE8 = 1 (FREE STANDING) or RE8 =2 (SINGLE HOME, ATTACHED), go to HT3.
> Otherwise, go to HT4

---

# HT3                 ht5placedesc                 R5 HT3 PLACE BEST DESCRIPTION

**DISPLAY INSTRUCTIONS:**

Display "BEST" in ALL CAPS and BOLD UNDERLINED text.

**QUESTION TEXT:**

> SHOW CARD HT1
>
> Now, I'm going to show you a list of places.  Which of these BEST describes this place?
>
> PRESS F1 FOR HELP SCREEN

**CODES**

| | | |
|---|---|---|
| 1 | PRIVATE RESIDENCE | Box HT3b |
| 2 | A GROUP HOME, BOARD AND CARE, OR SUPERVISED HOUSING | Box HT3b |
| 3 | ASSISTED LIVING FACILITY OR CONTINUING CARE RETIREMENT COMMUNITY (CCRC) | Box HT3b |
| 4 | | Box Ht3b |
| 91 | RELIGIOUS GROUP QUARTERS | |
| | OTHER (SPECIFY) | |

---

## HT3A
**HT3A**                     NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER TYPE OF PLACE

**ENTER TEXT**

Length                                        25

**PROGRAMMER INSTRUCTIONS:**
Text length 25 char

---

## BOX HT3B
**BOX HT3B**                 NOT ON FILE

If HT3 = 2(Group Home) or 3(Assisted Living/CCRC), set FACILITY flag = 1(YES), set FACILITYTYPE flag =2 (OTHER FACILITY), and set FACILITY TASK flag = 1 (REQUIRED)

---

## HT4
**ht5retiresen**             R5 HT4 RETIRMNT CMMTY SEN HOUSIN

**QUESTION TEXT:**

Is {your/SP's} home part of a retirement community or a senior housing community?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
If HT4 = 1 (YES), set RETIREMENT COMMUNITY flag = 1 (YES).

---

## BOX HT5
**BOX HT5**                  NOT ON FILE

If FACILITY flag=1 (YES) and Facility Task = code 20 (COMPLETED), go to Box HT9a.

If FACILITY flag = 1 (YES) and FACILITY TASK flag=1 (REQUIRED), go to BOX HT9a.

Else if RETIREMENT COMMUNITY flag = 1 (YES) , go to HT5

Else if STRUCTURE flag =2 (MULTIUNIT) or 3 (OTHER), go to HT5

Else set FACILITY TASK flag  = 24 (NOT REQUIRED) and go to BOX HT11

---

## HT5
**ht5diffareun**             R5 HT5 DIFF AREAS UNITS TO MOVE

**QUESTION TEXT:**

Does the place {you live/SP lives} have different areas or units that {you/{he/she}} can move to if {you need/{he/she} needs} care—like assisted living, a special unit for memory care, or a nursing home?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX HT8 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## HT6
**ht5helpmedbd**             R5 HT6 HELP W MEDS BATH DRESSING

**QUESTION TEXT:**

Does the place {you live/SP lives} offer help with medications or with activities such as bathing or dressing?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX HT8 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

**HT7**  **ht5meals**  R5 HT7 MEALS FOR RESIDENTS

**QUESTION TEXT:**

Does the place {you live/SP lives} offer meals for residents?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX HT8**  **BOX HT8**  NOT ON FILE

If HT5=1 (YES) or HT6=1 (YES) or HT7=1 (YES), set FACILITY TASK flag =1 (REQUIRED), set FACILITYTYPE flag = 2 (OTHER FACILITY), set FACILITY flag =1 (YES), and go to Box HT9a.

Else set Facility Task = code 24 (NOT REQUIRED) and go to BOX HT11

---

**BOX HT9A**  **BOX HT9A**  NOT ON FILE

If Facility Task = code 20 (COMPLETED ), use FACILITY NAME from FQ for facility name displays and go to HT10.
Else if preloaded IMS facility name field is not blank, go to HT9a.

Otherwise, go to HT9b.

---

**HT9A**  **HT9A**  NOT ON FILE

**QUESTION TEXT:**

I have recorded {FACILITY NAME} as the name of the place where {you live/SP lives}. Is this correct?

IF PLACE NAME IS NOT DISPLAYED, ENTER 2.

**CODES**

| | | |
|---|---|---|
| 1 | YES | HT10 |
| 2 | NO | |
| 7 | PLACE DOES NOT HAVE A NAME | HT10 |

**PROGRAMMER INSTRUCTIONS:**

If HT9A=1, display preloaded IMS facility name for facility name displays.
Otherwise, use null display for facility name displays.

IMS will pull Facility Name from HT9a from NHATS Interview Task once task status = 20 (COMPLETE)

---

**HT9B**  **HT9B**  NOT ON FILE

**QUESTION TEXT:**

Please tell me the name of the place where {you live/SP lives}.

**ENTER TEXT**

Length                                    75

**PROGRAMMER INSTRUCTIONS:**

Text length 75 char

Display FACILITY NAME from HT9b for facility name displays.

IMS will pull FACILITY NAME from HT9b from NHATS Interview Task once task status =20 (COMPLETE).

---

## HT10                    ht5spacename            R5 HT10 NAME OF LIVING SPACE

**DISPLAY INSTRUCTIONS:**

Display preloaded facility name or name entered from HT9b "at {FACILITY NAME/text from HT9b}". If no name collected, use null display.

**QUESTION TEXT:**

What {do you/does SP} call {your/his/her} private living space here {at {FACILITY NAME/text from HT9b}}? {Do you/Does SP} call this {your/his/her} apartment, room, unit, suite, or something else?

**CODES**

| | | |
|---|---|---|
| 1 | APARTMENT | Box HT11 |
| 2 | ROOM | Box HT11 |
| 3 | UNIT | Box HT11 |
| 4 | SUITE | Box HT11 |
| 91 | SOMETHING ELSE (SPECIFY | |

---

## HT10A                   HT10A                   NOT ON FILE

**QUESTION TEXT:**

SPECIFY NAME FOR PRIVATE LIVING SPACE

**ENTER TEXT**

Length                                    25

**PROGRAMMER INSTRUCTIONS:**

Text length 25 char

---

## BOX HT11                BOX HT11                NOT ON FILE

IF HT10 = 1 (APARTMENT), SET HOTYPE FLAG = 2, AND USE DISPLAY TEXT OF "Apartment".

ELSE IF HT10= 2 (ROOM), SET HOTYPE FLAG = 3, AND USE DISPLAY TEXT OF "Room".

ELSE IF HT10= 3 (UNIT), SET HOTYPE FLAG = 4, AND USE DISPLAY TEXT OF "Unit".

ELSE IF HT10=4 (SUITE), SET HOTYPE flag =5, and use display text of "suite".

ELSE IF HT10 = 91 (OTHER), SET HOTYPE flag = 6, AND USE DISPLAY TEXT ENTERED AT HT10A (OTHER).

ELSE SET HOTYPE FLAG = 1, AND USE DISPLAY TEXT OF "Home".

Go to Section SE – Service Environment

---

**Flag Variables set in HT Section**

| | |
|---|---|
| **fl5facility** | R5 F RE ROUTING FLAG FROM RE4f HT3 5 6 7 |
| **fl5hotype** | R5 F RE HT TYPE OF HOME |
| **fl5retirecom** | R5 F RE HT SP LIVES IN RETIREMT COM |

| **BOX SE1PRE** | **BOX SE1PRE** | NOT ON FILE |

> If FACILITY flag = 1 (YES), go to Section SE1PRE.
> Else if RETIREMENT COMMUNITY flag = 1 (YES), go to SE1PRE.
> Otherwise, go to Section HH - Household

| **SE1PRE** | **SE1PRE** | NOT ON FILE |

**DISPLAY INSTRUCTIONS:**

> Display "offers" in underlined text.
> If FQ task is completed, display [FACILITY NAME} from FQ.
> Else if HT9a=1 (YES), display {FACILITY NAME} from IMS
> Else if HT9b<>EMPTY, display {FACILITY NAME} from HT9b.
> Otherwise, display "the place where {you live/SP lives}".

**QUESTION TEXT:**

> Sometimes people live in places that offer care and other services and conveniences that help with daily activities.
>
> I'm going to read you a list of services that may be available to people at {FACILITY NAME/the place where {you live/SP lives}}. Whether or not {you use/{he/she} uses} it, please tell me if {FACILITY NAME/the place where {you live/SP lives}} offers the following services.
>
> If you are not sure, just say you don't know.
>
> PRESS 1 AND ENTER TO CONTINUE.

| **BOX SE1** | **BOX SE1** | NOT ON FILE |

> If HT7 = 1 (YES, MEALS OFFERED), code SE1A = 1 (YES) and go to SE1b.
> Otherwise, go to SE1A.

| **SE1** | **se5servcoff1** | R5 SE1 FAC SERVICES MEALS |
| | **se5servcoff2** | R5 SE1 FAC SERVICES HELP W RX |
| | **se5servcoff3** | R5 SE1 FAC SERV HELP BATH DRESS |
| | **se5servcoff4** | R5 SE1 FAC SERVICES LAUNDRY |
| | **se5servcoff5** | R5 SE1 FAC SERVICES HOUSEKEEP |
| | **se5servcoff6** | R5 SE1 FAC SERV VAN TO DOCTOR |
| | **se5servcoff7** | R5 SE1 FAC SRV VAN TO STORE EVNT |
| | **se5servcoff10** | R5 SE1 FAC SERV FITNESS CTR |
| | **se5servcoff11** | R5 SE1 FAC SERV WALKING AREA |
| | **se5servcoff8** | R5 SE1 FAC SERV RECREATIONAL FAC |
| | **se5servcoff9** | R5 SE1 FAC SERV SOCIAL EVENTS |
| | **se5servcoff12** | R5 SE1 FAC SERV ONSITE HEALTH |
| | **se5servcoff13** | R5 SE1 FAC SERV MED EMERGENCY SYSTEM |

**DISPLAY INSTRUCTIONS:**

If FQ task is completed, display [FACILITY NAME] from FQ.
Else if Ht9a=1 (YES), display {FACILITY NAME} from IMS.
Else if HT9b<>EMPTY, display {FACILITY NAME} from HT9b.
Otherwise, display "the place where {you live/SP lives}".

Use "Same Question Stem" display.

If at SE1a, do not display question text in brackets.
If at SE1b and SE1a was not displayed, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

[{}Whether or not {you use/SP uses} it, does {FACILITY NAME/the place where {you live/SP lives}} offer residents {]}

{variable text [a-m]}

RESPONSE[1] a. meals in a common dining area or in their room?
RESPONSE[2] b. help with medications?
RESPONSE[3] c. help with bathing or dressing?
RESPONSE[4] d. laundry service for linens or clothing?
RESPONSE[5] e. housekeeping?
RESPONSE[6] f. a van or shuttle to doctors or other medical care providers?
RESPONSE[7] g. a van or shuttle to stores or events like concerts?
RESPONSE[10] h. an indoor fitness center?
RESPONSE[11] i. areas to walk for pleasure or exercise like an outdoor walking path?
RESPONSE[8] j. other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE[9] k. organized social events and activities?
RESPONSE[12] l. onsite health and wellness programs?
RESPONSE[13] m. a medical emergency system to call someone for help?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel
Display "variable text" in the a-m sequence until all rows have been displayed.

| **BOX SE2** | **BOX SE2** | NOT ON FILE |
|---|---|---|

If any item at SE1a-m = 1 (YES), go to SE2
Otherwise, go to Section HH - Household

| **SE2** | | |
|---|---|---|
| | **se5servused1** | R5 SE2 SERVS USED MEALS |
| | **se5servused2** | R5 SE2 SERVS USED HELP W RX |
| | **se5servused3** | R5 SE2 SERVS USED HLP BATH DRESS |
| | **se5servused4** | R5 SE2 SERVS USED LAUNDRY |
| | **se5servused5** | R5 SE2 SERVS USED HOUSEKEEPING |
| | **se5servused6** | R5 SE2 SERVS USED VAN TO DOCTOR |
| | **se5servused7** | R5 SE2 SERVS USED VAN TO STORE |

| se5servused10 | R5 SE2 SERVS USED FITNESS CTR |
| se5servused11 | R5 SE2 SERVS USED WALKING AREA |
| se5servused8 | R5 SE2 SERVS USED RECREATION FAC |
| se5servused9 | R5 SE2 SERVS USED SOCIAL EVENTS |
| se5servused12 | R5 SE2 SERVS USED ONSITE HEALTH |
| se5servused13 | R5 SE2 SERVS USED MED EMERGENCY SYSTEM |

**DISPLAY INSTRUCTIONS:**

If FQ task is completed, display [FACILITY NAME] from FQ.
Else if Ht9a=1 (YES), display {FACILITY NAME} from IMS.
Else if HT9b<>EMPTY, display {FACILITY NAME} from HT9b.
Otherwise, display "the place where {you live/SP lives}".

If SE1a = 1 (YES), display SE2a.
If SE1b = 1 (YES), display SE2b.
If SE1c = 1 (YES), display SE2c.
If SE1d = 1 (YES), display SE2d.
If SE1e = 1 (YES), display SE2e.
If SE1f = 1 (YES), display SE2f.
If SE1g = 1 (YES), display SE2g.
If SE1h = 1 (YES), display SE2h.
If SE1i = 1 (YES), display SE2i.
If SE1j = 1 (YES), display SE2j.
If SE1k = 1 (YES), display SE2k.
If SE1l = 1 (YES), display SE2l.
If SE1m = 1 (YES), display SE2m.

Use "Same Question Stem" display

If at first item, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "used" and "in the last month" in bold underlined text.

**QUESTION TEXT:**

[{]Now, for each of the services offered by {FACILITY NAME/the place where {you live/SP lives}}, please tell me whether {you have/SP has} used it in the last month.[}]

{variable text [a-M]}

RESPONSE [1] a. meals (in a common dining areas or in {your/SP's} own room)?
RESPONSE [2] b. help with medications?
RESPONSE [3] c. help with bathing or dressing?
RESPONSE [4] d. laundry services for linens or clothing?
RESPONSE [5] e. housekeeping?
RESPONSE [6] f. a van or shuttle to doctors or other medical providers?
RESPONSE [7] g. a van or shuttle to stores or events like concerts?
RESPONSE [8] h. an indoor fitness center?
RESPONSE [9] i. areas to walk for pleasure or exercise like an outdoor walking path?
RESPONSE [10] j. other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [11] k. organized social events and activities?
RESPONSE [12] l. onsite health and wellness programs?
RESPONSE [13] m. a medical emergency system to call someone for help?

**CODES**

1         YES
2         NO
            REFUSED
            DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display "variable text" in the a-m sequence until all rows have been displayed.

| **BOX SE3** | **BOX SE3** | NOT ON FILE |
|---|---|---|
| | If any item at SE1a-m=1 (YES), go to SE3. Otherwise, go to Section HH – Household. | |

| **SE3** | | |
|---|---|---|
| | **se5payservi1** | R5 SE3 PAYMENT FOR SERV MEALS |
| | **se5payservi2** | R5 SE3 PAYMENT FOR SERV HLP W RX |
| | **se5payservi3** | R5 SE3 PAY FR SERV HLP BATH DRSS |
| | **se5payservi4** | R5 SE3 PAYMENT FOR SERV LAUNDRY |
| | **se5payservi5** | R5 SE3 PAYMENT FOR SERV HOUSEKEEP |
| | **se5payservi6** | R5 SE3 PAYMNT FR SERV VAN TO DOC |
| | **se5payservi7** | R5 SE3 PAY FOR SERV VAN TO STORE |
| | **se5payservi10** | R5 SE3 PAY FOR SERV FITNESS CTR |
| | **se5payservi11** | R5 SE3 PAY FOR SERV WALKING AREA |
| | **se5payservi8** | R5 SE3 PAY FOR SERV RECREATION |
| | **se5payservi9** | R5 SE3 PAY FOR SERV SOCIAL EVENTS |
| | **se5payservi12** | R5 SE3 PAY FOR SERV ONSITE HEALTH |
| | **se5payservi13** | R5 SE3 PAY FOR SERV MED EMERGENCY SYTEM |

**DISPLAY INSTRUCTIONS:**

If SE1a = 1 (YES), display SE3a.
If SE1b = 1 (YES), display SE3b.
If SE1c = 1 (YES), display SE3c.
If SE1d = 1 (YES), display SE3d. If
If SE1e = 1 (YES), display SE3e.
If SE1f = 1 (YES), display SE3f.
If SE1g = 1 (YES), display SE3g.
If SE1h = 1 (YES), display SE3h.
If SE1i = 1 (YES), display SE3i.
If SE1j = 1 (YES), display SE3j.
If SE1k = 1 (YES), display SE3k.
If SE1l = 1 (YES), display SE3l.
If SE1m = 1 (YES), display SE3m.

Use "Same Question Stem" display.

If at first item, do not display question text in brackets.
Otherwise display question text in brackets.

**QUESTION TEXT:**

{[}Last, for each service offered by {FACILITY NAME/the place where {you live/SP lives}}, please tell me if it is included in what {you pay/SP pays} to live here, or if there is an extra charge.{]}

{variable text [a -m]}

RESPONSE [1] a. meals (in a common dining area or in {your/SP's} own room)?
RESPONSE [2] b. help with medications?
RESPONSE [3] c. help with bathing and dressing?
RESPONSE [4] d. laundry services for linens or clothing?
RESPONSE [5] e. housekeeping?
RESPONSE [6] f. a van or shuttle to doctors or other medical care?
RESPONSE [7] g. a van or shuttle to stores or events like concerts?
RESPONSE [8] h. an indoor fitness center?
RESPONSE [9] i. areas to walk for pleasure or exercise like an outdoor walking path?
RESPONSE [10] j. other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [11] k. organized social events and activities?
RESPONSE [12] l. onsite health and wellness programs?
RESPONSE [13] m. a medical emergency system to call someone for help?

**CODES**

| | |
|---|---|
| 1 | INCLUDED |
| 2 | EXTRA CHARGE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display "variable text" in the a-m sequence until all rows have been displayed.

Go to Section HH – Household.

---

**HH1PRE**                     **HH1PRE**                     NOT ON FILE

**QUESTION TEXT:**

> Now let's talk about {your/SP's} family.
>
> PRESS 1 AND ENTER TO CONTINUE

---

**BOX HH1A**                   **BOX HH1A**                   NOT ON FILE

> If NEWSAMPLE flag = 1 (YES), go to HH1.
>
> If LAST INT SP MARITAL STATUS = null, go to HH1.
> Otherwise, go to HH1A.

---

**HH1A**                       **hh5marchange**               R5 HH1A MARITAL STATUS CHANGE

**DISPLAY INSTRUCTIONS:**

> If LAST INT SP MARITAL STATUS = 1 (MARRIED), display "married".
> If LAST INT SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "living with a partner".
> If LAST INT SP MARITAL STATUS = 3 (SEPARATED), display "separated".
> If LAST INT SP MARITAL STATUS = 4 (DIVORCED), display "divorced".
> If LAST INT SP MARITAL STATUS = 5 (WIDOWED), display "widowed".
> If LAST INT SP MARITAL STATUS = 6 (NEVER MARRIED), display "never married".

**QUESTION TEXT:**

> At the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} {married/living with a partner/separated/divorced/widowed/never married}. Has that changed?
>
> That is, did {you/SP} get married, separated, divorced, remarried, widowed, or start living with a (different) partner?

**CODES**

| | | |
|---|---|---|
| 1 | YES | HH1 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

> If HH1A <> 1 (YES), for ROSTER MEMBER that had LAST INT relationship code = 2 (SPOUSE/PARTNER), set SPOUSE/PARTNER flag = 1 (YES).

---

**BOX HH1**                     **BOX HH1**                     NOT ON FILE

> If LAST INT SP MARITAL STATUS = 1 (MARRIED) OR 2 (LIVING WITH PARTNER), set CURRENT INT SP MARITAL STATUS = LAST INT SP MARITAL STATUS and go to BOX HH4A1.
> Otherwise, set CURRENT INT SP MARITAL STATUS = LAST INT SP MARITAL STATUS and go to BOX HH13.

---

**HH1**                         **hh5martlstat**               R5 HH1 MARITAL STATUS IF CHANGED

                               **hh5dmarstat**                R5 D MARITAL STATUS AT R5

**DISPLAY INSTRUCTIONS:**

> Display "currently" in underlined text.

**QUESTION TEXT:**

{Are you/Is SP} currently married, living with a partner, separated, divorced, widowed, or never married?

**CODES**

| | | |
|---|---|---|
| 1 | MARRIED | |
| 2 | LIVING WITH A PARTNER | |
| 3 | SEPARATED | BOX HH13 |
| 4 | DIVORCED | |
| 5 | WIDOWED | |
| 6 | NEVER MARRIED | BOX HH13 |
| | REFUSED | BOX HH13 |
| | DON'T KNOW | BOX HH13 |

**PROGRAMMER INSTRUCTIONS:**

Set Marital Status = HH1 for SP on PERSON ROSTER.

If NEWSAMPLE flag <> 1 (YES) and HH1 = 5 (WIDOWED), for ROSTER MEMBER that had LAST INT relationship code = 2 (SPOUSE/PARTNER), set DECEASED flag = 1 (YES), CURRENT INT RELATIONSHIP CODE = 33 (EX-SPOUSE/PARTNER), INHH flag = null, and CURRENT INT ADDRESS1, ADDRESS2, CITY, STATE and ZIP = null.

If NEWSAMPLE flag <> 1 (YES) and HH1 = 4 (DIVORCED), for ROSTER MEMBER that had LAST INT relationship code = 2 (SPOUSE/PARTNER), set CURRENT INT RELATIONSHIP CODE = 33 (EX-SPOUSE/PARTNER).

---

**BOX HH2A**          BOXHH2A          NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HH3.

Else if SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HH4A2.
Otherwise, go to HH2A.

---

**HH2A**          hh5mthendmar (Sensitive)          R5 HH2A MTH MARR END OR SPS PASS

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS=4 (DIVORCED), display "{your/SP's} (most recent) marriage end".
If SP MARITAL STATUS =5 (WIDOWED), display, "{your/SP's} spouse or partner pass away".

Display "MONTH" in underlined text.

**QUESTION TEXT:**

In what month and year did {{your/SP's} (most recent) marriage end/{your/SP's} spouse or partner pass away}?

ENTER MONTH

**ENTER NUMBER**

| | | |
|---|---|---|
| RANGE | | 1 to 12 |
| REFUSED | | |
| DON'T KNOW | | |

---

**BOX HH2B**          BOXHH2B          NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HH2B.
Otherwise, go to HH2C.

---

## HH2B      hh5dyrendmarr      R5 D YR MARR END FROM HH2B AND HH2C

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STAUTS=4 (DIVORCED), display "{your/SP's} (most recent) marriage end".

If P MARITAL STAUTS=5 (WIDOWED), display, "{your/SP's} spouse pass away".

**QUESTION TEXT:**

[In what month and year did {{your/SP's} (most recent) marriage end/{your/SP's} spouse pass away}?]

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

        REFUSED
        DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

If date created from (month from HH2a) and (year from HH2b) > CURRENT MONTH and YEAR, display error message "INVALID RESPONSE. MONTH AND YEAR MARRIAGE ENDED/SPOUSE PASSED AWAY CANNOT BE GREATER THAN CURRENT MONTH AND YEAR."

All responses skip to Box HH13

---

## HH2C      hh5dyrendmarr      R5 D YR MARR END FROM HH2B AND HH2C

**DISPLAY INSTRUCTIONS:**
If SP MARITAL STATUS=4 (DIVORCED), display "{your/SP's} (most recent) marriage ended".
If SP MARITAL STATUS =5 (WIDOWED), display, "{your/SP's} spouse passed away".

**QUESTION TEXT:**

In what month and year did {{your/SP's} (most recent) marriage end/{your/SP's} spouse or partner pass away}?

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

        REFUSED
        DON'T KNOW
**PROGRAMMER INSTRUCTIONS:**
Soft Range: CURRENT YEAR-1 to CURRENT YEAR
Hard Range: R1 INT YEAR to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #5.

All responses skip to BOX HH13.

---

## HH3      hh5yrsmarliv      R5 HH3 YEARS MARR OR LIV TOGTEHR

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and SP MARITAL STATUS=1 (MARRIED), display "have you, "and {SP}", and "been married".

Else if PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and SP MARITAL STATUS=2 (LIVING WITH A PARTNER), display "have you", "and {SP}" and "lived together".

Else if PROXY flag=1 (YES) and SP MARITAL STATUS=1 (MARRIED), display "has {SP}" and "been married".

Else if PROXY flag=1 (YES) and SP MARITAL STATUS=2 (LIVING WITH A PARTNER), display "have {SP}", "and {his/her} partner", and "lived together".

Else If SP MARITAL STATUS=1 (MARRIED), display "have you" and "been married".

Else if SP MARITAL STATUS=2 (LIVING WITH A PARTNER), display "have you", "and your partner" and "lived together".

**QUESTION TEXT:**

How many years {have you/has {SP}/have {SP}} {and {{SP}/{his/her} partner/your partner} {been married/lived together}?

ENTER NUMBER OF YEARS
IF LESS THAN 1 YEAR, ENTER 0

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 80 |
| Soft Range | 0 to 60 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range 0-80
Soft range 0-60

---

**BOX HH4A1**          **BOX HH4A1**          NOT ON FILE

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), set SPOUSE/PARTNER flag=1 FOR PERSON, and go to BOX HH6a.
Else if HH1A = 2 (MARITAL STATUS NOT CHANGED), go to HH4A1.
Else if HH1A = RF or DK (MARITAL STATUS REFUSED OR DON'T KNOW), go to BOX HH13.
Otherwise, go to HH4a.

---

**HH4A1**          **hh5newspoprt**          R5 HH4A1 SPOUSE PRTNR SAME OR DIFF

          **op5spouprtnr**          R5 SPOUSE PARTNER

          **op5nwspouprt**          R5 NEW SPOUSE PARTNER THIS ROUND

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".
If SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "partner".

**QUESTION TEXT:**

Now I'd like to confirm {your/SP's} {spouse/partner}'s name. I have it as {SPOUSE/PARTNER FIRST NAME MIDDLE NAME LAST NAME}. Is that correct?

CONFIRM SPELLING

**CODES**

| | | |
|---|---|---|
| 1 | YES | HH10 |
| 2 | NO, DIFFERENT PERSON | |

| 3 | NO, NAME MISSPELLED | HH4A |
|---|---|---|

**PROGRAMMER INSTRUCTIONS:**

If HH4A1 = 2 (DIFFERENT PERSON) and LAST INT SP MARITAL STATUS = 1 (MARRIED) or 3 (SEPARATED), set ROSTER MEMBER with LAST INT relationship code = 2 (SPOUSE/PARTNER) to CURRENT INT relationship code = 33 (EX-WIFE/HUSBAND).

Else if HH4A1 = 2 (DIFFERENT PERSON) and LAST INT SP MARITAL STATUS = 2 (LIVING WITH PARTNER), set ROSTER MEMBER with LAST INT relationship code = 2 (SPOUSE/PARTNER) to CURRENT INT relationship code = 92 (OTHER NONRELATIVE).

---

## HH4A2

| HH4A2 | NOT ON FILE |
|---|---|

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".
If SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "partner".

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

Display "NOT ON LIST" as first roster option.

**QUESTION TEXT:**

What is {your/SP's} {spouse/partner}'s name?

CHOOSE PERSON FROM LIST

**PROGRAMMER INSTRUCTIONS:**

If proxy relationship <> 2 (spouse/partner) and if selected ROSTER MEMBER has PROXY RESP CURRENT INT FLAG = 1, display error message, "You have chosen the proxy. The proxy relationship is not spouse. Please change the proxy relationship or correct the spouse selection."

If existing ROSTER MEMBER selected, set SPOUSE/PARTNER flag = 1 (YES) and RELATIONSHIP = 2 (SPOUSE/PARTNER) for ROSTER MEMBER, go to BOX HH5.

Otherwise, go to HH4A.

If existing roster member selected, and HH1A = 1 (YES) and preload relationship = 2 (SPOUSE/PARTNER), display soft error message "You have SELECTED the existing spouse/partner. Confirm selection or correct marital status change if needed".

If LAST INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH PARTNER), CURR INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH PARTNER) and existing roster member selected (at HH4A2) <> preload spouse, set ROSTER MEMBER with LAST INT relationship code = 2 (SPOUSE/PARTNER) to CURRENT INT relationship code = 33 (EX-SPOUSE/PARTNER).

---

## HH4A

| HH4A | NOT ON FILE |
|---|---|

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".
If SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "partner".

If HH4A1 = 3 (SPOUSE NAME CORRECTION), display preloaded SPOUSE/PARTNER name in the response fields, "the correct spelling of", and display SPOUSE/PARTNER name in response field and allow edits.

Display "FIRST" in bold underlined text.

**QUESTION TEXT:**

ENTER FIRST NAME. CONFIRM SPELLING

**ENTER TEXT**

Length 45

**PROGRAMMER INSTRUCTIONS:**

HH4A, HH4B, and HH4C are displayed on the same screen.

If HH4a=2 (DIFFERENT PERSON), write ROSTER PERSON to next open position on PERSON ROSTER.

---

# HH4B

**HH4B** NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".
If SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "partner".

If HH4A1 = 3 (SPOUSE NAME CORRECTION), display preloaded SPOUSE/PARTNER name in the response fields, "the correct spelling of", and display SPOUSE/PARTNER name in response field and allow edits.

Display "MIDDLE" in bold underlined text.

**QUESTION TEXT:**

[What is {the correct spelling of} {your/SP's} {spouse/partner}'s name?]

ENTER MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

**ENTER TEXT**

Length 25

**PROGRAMMER INSTRUCTIONS:**

HH4A, HH4B, and HH4C are displayed on the same screen.

Allow empty.

---

# HH4C

**HH4C** NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".
If SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "partner".
If HH4A1 = 3 (SPOUSE NAME CORRECTION), display preloaded SPOUSE/PARTNER name in the response fields, "the correct spelling of", and display SPOUSE/PARTNER name in response field and allow edits.
Display "LAST" in bold underlined text.

**QUESTION TEXT:**

[What is {the correct spelling of} {your/SP's} {spouse/partner}'s name?]

ENTER LAST NAME. CONFIRM SPELLING

**ENTER TEXT**

Length 25

**PROGRAMMER INSTRUCTIONS:**

HH4A, HH4B, and HH4C are displayed on the same screen.

Write (new or updated) SPOUSE/PARTNER name from HH4 to PERSON ROSTER.  Set SPOUSE/PARTNER flag = 1 (YES) for person entered at HH4.  Set RELATIONSHIP = 2 (SPOUSE/PARTNER).

| **BOX HH5** | **BOX HH5** | NOT ON FILE |
|---|---|---|

If SPOUSE/PARTNER gender = null, go to HH5.
Otherwise, go to HH6A.

| **HH5** | **hh5spgender** | R5 HH5 NEW R4 SPOU PART GENDER |
|---|---|---|
| | **op5dgender** | R5 D GENDER UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**
If SP MARITAL STATUS=1 (MARRIED), display "spouse".
If SP MARITAL STATUS =2 (LIVING WITH A PARTNER), display "partner".

**QUESTION TEXT:**
ASK IF NECESSARY: Is {your/SP's} {spouse/partner} male or female?

**CODES**
| 1 | MALE |
|---|---|
| 2 | FEMALE |

**PROGRAMMER INSTRUCTIONS:**
Write SPOUSE/PARTNER gender from HH5 to PERSON ROSTER.

| **BOX HH6A** | **BOX HH6A** | NOT ON FILE |
|---|---|---|

If SPOUSE/PARTNER DOB or Age = null, go to HH6A.
Otherwise, go to HH9.

| **HH6A** | **hh5modob (Sensitive)** | R5 HH6A NEW R4 SPOU PART MO DOB |
|---|---|---|
| | **op5birthmth (Sensitive)** | R5 OTHER PERSON MONTH OF BIRTH |

**DISPLAY INSTRUCTIONS:**
If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRST NAME LAST NAME}'s".
Display HH6A, HH6B, and HH6C on the same screen.

Display "month" as underlined text.

**QUESTION TEXT:**
What is {your/{SPOUSE/PARTNER FIRST NAME LAST NAME}'s} date of birth?

ENTER MONTH

**ENTER NUMBER**
| Range | 1 to 12 |
|---|---|
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**
Hard range 1-12

**HH6B**                    **HH6B**                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "your". Otherwise, display "{SPOUSE/PARTNER FIRST NAME LAST NAME}'s".
Display HH6A, HH6B, and HH6C, on the same screen.

Display "day" as underlined text.

**QUESTION TEXT:**

[What is {your/{SPOUSE/PARTNER FIRST NAME LAST NAME}'s} date of birth?]

ENTER DAY

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 31 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range 1-31

---

# HH6C              **hh5yrdob (Sensitive)**       R5 HH6C NEW R5 SPOU PART YR DOB

**op5birthyear (Sensitive)**   R5 OTHER PERSON YEAR OF BIRTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "your". Otherwise, display "{SPOUSE/PARTNER FIRST NAME LAST NAME}'s".

Display HH6A, 6B, and 6C, on the same screen.

Display "year" as underlined text.

**QUESTION TEXT:**

[What is {your/{SPOUSE/PARTNER FIRST NAME LAST NAME}'s} date of birth?]

ENTER YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Hard range: CURRENT YEAR – 110.

If HH6A ≥ 1 and HH6B ≥ 1 and HH6C ≥ 1, compute PERSON AGE as (CURRENT DATE - HH6A-C DOB) and prefill HH7. Otherwise, go to HH8.

---

**HH7**              **hh5dspageall**          R5 D SPOU PAR AGE UPDATE AND NEW

**hh5spageall**          R5 SPOU PAR AGE UPDATE AND NEW

**op5age (Sensitive)**    R5 OTH PERSON AGE UPDATE AND NEW

**op5dage**              R5 D OP CAT AGE UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "you".
Otherwise, display "{FIRSTNAME LASTNAME}".

**QUESTION TEXT:**

That makes {you/{FIRSTNAME LASTNAME}} {CALCULATED AGE} today. Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | HH9 |
| 2 | NO | HH6A |
| | REFUSED | HH9 |
| | DON'T KNOW | HH9 |

**PROGRAMMER INSTRUCTIONS:**

If HH7 = 1 (YES), DK, or RF, write PERSON AGE to PERSON ROSTER.
If HH7 = 2 (NO), display error message "PLEASE CORRECT THE DATE OF BIRTH INFORMATION".

---

| **HH8** | **hh5dspageall** | R5 D SPOU PAR AGE UPDATE AND NEW |
|---|---|---|
| | **hh5spageall** | R5 SPOU PAR AGE UPDATE AND NEW |
| | **op5age (Sensitive)** | R5 OTH PERSON AGE UPDATE AND NEW |
| | **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "are you".
Otherwise, display "is {FIRSTNAME LASTNAME}".

**QUESTION TEXT:**

How old {are you/is {FIRSTNAME LASTNAME}}?

ENTER AGE

**ENTER NUMBER**

| | |
|---|---|
| Range | 18 to 110 |
| Soft Range | 55 to 99 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 18-110.
Soft range: 55-99.
Write SPOUSE/PROXY age to PERSON ROSTER.
If HH8 = DK or RF, display "DK" or "RF" in matrix age field.

---

| **BOX HH9** | **BOX HH9** | NOT ON FILE |
|---|---|---|

If ROSTER MEMBER Education Level = null, go to HH9.
Otherwise, go to HH10.

---

| **HH9** | **hh5spouseduc** | R5 HH9 NEW R5 SPOU HIGH EDUC |
|---|---|---|
| | **op5eduspo** | R5 HH9 SPOU PART EDUC WHEN ADDED |
| | **op5leveledu** | R5 OP HIGHEST ED UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SPOUSE/PARTNER FIRST NAME LAST NAME".

**QUESTION TEXT:**

> SHOW CARD HH1
>
> What is the highest degree or level of school {you/{SPOUSE/PARTNER FIRST NAME LAST NAME}} completed?

**CODES**

| | |
|---|---|
| 1 | NO SCHOOLING COMPLETED |
| 2 | 1ST-8TH GRADE |
| 3 | 9TH-12TH GRADE (NO DIPLOMA) |
| 4 | HIGH SCHOOL GRADUATE (HIGH SCHOOL DIPLOMA OR EQUIVALENT) |
| 5 | VOCATIONAL, TECHNICAL, BUSINESS, OR TRADE SCHOOL CERTIFICATE OR DIPLOMA (BEYOND HIGH SCHOOL LEVEL) |
| 6 | SOME COLLEGE BUT NO DEGREE |
| 7 | ASSOCIATE'S DEGREE |
| 8 | BACHELOR'S DEGREE |
| 9 | MASTER'S, PROFESSIONAL, OR DOCTORAL DEGREE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
Write education level to PERSON ROSTER.
If HH9 = DK or RF, display "DK" or "RF" in matrix education field.

---

# HH10                 **hh5spoupchlp**              R5 HH10 SPOUS NEED PERS CARE HLP

**DISPLAY INSTRUCTIONS:**
If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does {SPOUSE/PARTNER FIRST NAME LAST NAME}".

**QUESTION TEXT:**

> Because of a physical, mental, or emotional condition, {do you/does {SPOUSE/PARTNER FIRST NAME LAST NAME}} need the help of another person with personal care needs, such as eating, bathing, dressing, or getting around inside the home?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# HH11                 **hh5livwthspo**              R5 HH11 LIVE WITH SPOUSE PARTNER

                            **op5prsinhh**                R5 OP IN HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**
If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "you live" and "{SP}". Else if PROXY flag=1 (YES), display "{SPOUSE/PARTNER FIRST NAME LAST NAME} lives" and "{SP}". Otherwise, display "{SPOUSE/PARTNER FIRST NAME LAST NAME} lives" and "you".

**QUESTION TEXT:**

> Just to confirm, {you live/{SPOUSE/PARTNER FIRST NAME LAST NAME} lives} with {{SP}/you}, is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX HH13 |
| 2 | NO | |

|  | REFUSED | BOX HH13 |
|  | DON'T KNOW | BOX HH13 |

**PROGRAMMER INSTRUCTIONS:**
> If HH11=1 (YES), set INHH flag = 1 (YES) and ADDRESS1, ADDRESS2, CITY, STATE and ZIP = SP's
> CURRENT INT ADDRESS1, ADDRESS2, CITY, STATE and ZIP for SPOUSE/PARTNER.

---

**HH12**              **hh5placekind**              R5 HH12 KIND OF PLACE LIVE IN

**DISPLAY INSTRUCTIONS:**
> If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "are you". Otherwise, display
> "{SPOUSE/PARTNER FIRSTNAME LASTNAME} is".

**QUESTION TEXT:**
> SHOWCARD HH2
>
> What kind of place {are you/is {SPOUSE/PARTNER FIRSTNAME LASTNAME}} living in now?
>
> PRESS F1 FOR HELP SCREEN

**CODES**
| 1 | PRIVATE RESIDENCE | BOX HH13 |
| 2 | A GROUP HOME, BOARD AND CARE, OR SUPERVISED HOUSING | BOX HH13 |
| 3 | ASSISTED LIVING FACILITY OR CONTINUING CARE RETIREMENT COMMUNITY (CCRC) | BOX HH13 |
| 5 | NURSING HOME | BOX HH13 |
| 91 | OTHER (SPECIFY) | |
|  | REFUSED | BOX HH13 |
|  | DON'T KNOW | BOX HH13 |

---

**HH12A**              **HH12A**              NOT ON FILE

**QUESTION TEXT:**
> SPECIFY OTHER TYPE OF PLACE

**ENTER TEXT**
| Length | 50 |

---

**BOX HH13**              **BOX HH13**              NOT ON FILE

> If FACILITY flag = 1 (YES), go to Section CS – Children and Siblings.
> Else if NEWSAMPLE flag=1(YES), go to HH13B.
> Otherwise, go to BOX HH13D.

---

**HH13B**              **hh5othlvhere**              R5 HH13B ANYONE ELSE LIVE HERE

**DISPLAY INSTRUCTIONS:**
> If PROXY flag = 2 (NO) or [PROXY flag = 1(YES) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER) and
> INHOUSEHOLD flag for SPOUSE/PARTNER= 1 (YES)], display "you".
> Else if PROXY flag=1 (YES) and INHH flag for PROXY=1 (YES) and PROXY RELATIONSHIP ‡ 2 (SPOUSE/PARTNER), display "you
> and SP".
> Otherwise, display "{SP}".

IF INHH flag=1 (YES) for SPOUSE/PARTNER, display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}"
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

Does anyone else live (here) with {{you/SP/you and SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | HH14 |
| 2 | NO | SECTION CS |
| | REFUSED | SECTION CS |
| | DON'T KNOW | SECTION CS |

---

## BOX HH13D          BOX HH13D               NOT ON FILE

If any ROSTER MEMBERS other than SP have LAST INT INHH flag = 1 (YES) and CURRENT INT DECEASED flag <> 1 (YES) or [CURRENT INT relationship code = 2 (SPOUSE/PARTNER) and CURRENT INT INHH flag = 1 (YES) and DECEASED flag <> 1 (YES) for ROSTER MEMBER], or [ CURRENT INT PROXY RESPONDENT flag = 1 (YES) and CURRENT INT INHH flag = 1 (YES)] , go to HH13D.

Otherwise, go to HH14.

---

## HH13D          **op5prsinhh**          R5 OP IN HOUSEHOLD UPDATE AND NEW

                      **op5childinhh**        R5 CHILD IN HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HHMEMBER ROSTER as a grid.  Display SP, SPOUSE/PARTNER if INHH flag = 1 (YES),  and DECEASED flag <> 1 (YES), and PROXY if INHH flag = 1 (YES) on the HHMEMBER GRID.

If ROSTER MEMBER age = response, display "{, approximately age {age}}.

Display questions HH13D-HH13E on full matrix screen.

**QUESTION TEXT:**

Now I have a few questions about {your/SP's} household.  At the time of the last interview, we recorded that the following people lived with {you/SP}.  As I read each person's name, please tell me if he or she still lives in the household.  Please include people temporarily absent.

Does {FIRSTNAME LASTNAME} ({relationship to SP}{, gender}{, approximately age {age}}) still live in the household?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Display preloaded grid with SP, and any ROSTER MEMBERS with a LAST INT INHH or CURRENT INT INHH flag = 1 (YES) and DECEASED flag <> 1 (YES).  SP, Spouse, and Proxy roster entries should include revised info from current round if updated.

Display grid with fields: Still in HH, Reason Left, First Name, and Last Name. First Name, Last Name, and Still in HH and Reason Left fields can be edited. SP, Spouse, and Proxy rows should also be write-protected.

When entering a new field, start cursor after last entry value or text.

If PROXY flag = 1 (YES) and IS11A = 2 (NO), go to HH13E for CURRENT INT PROXY.
Otherwise, start cursor at the "Still in HH" column for the first ROSTER MEMBER listed who is not the SP, Spouse, ROSTER MEMBER with RELATIONSHIP CODE = 33 (EX-SPOUSE/PARTNER) and DECEASED flag = 1 (YES), or Proxy.

If HH13D = 2 (NO), RF or DK set ADDRESS1, ADDRESS2, CITY, STATE and ZIP = null for ROSTER MEMBER.
If HH13D = 1 (YES), set ADDRESS1, ADDRESS2, CITY, STATE and ZIP = SP's CURRENT INT ADDRESS1, ADDRESS2, CITY, STATE and ZIP.

If at HH13D, do not display question text in brackets the first time the screen is displayed.
Otherwise, display question text in brackets.

Allow up to 32 row entries.
Allow movement between grid items using the arrow keys.
Text field is 2 5 char for each name field.

If HH13D = 2 (NO), RF or DK, set INHH flag = 2 (NO), and go to HH13E.
Else if HH13D = 1 (YES), set INHH flag = 1 (YES), and go to HH13F.

---

# HH13E                    op5reasgone              R5 HH13E REASON GONE FROM HH

**DISPLAY INSTRUCTIONS:**

If PROXY flag = 1 (YES), display "are you".
Otherwise, display "is {FIRSTNAME LASTNAME}".

**QUESTION TEXT:**

Why {are you/is {FIRSTNAME LASTNAME}} no longer living in the household?

**CODES**

| | |
|---|---|
| 1 | SEPARATION OR DIVORCE |
| 2 | DECEASED |
| 3 | MOVED ELSEWHERE |
| 5 | LAST INTERVIEW INFORMATION INCORRECT |
| 8 | OTHER REASON |
| | REFUSED |
| | DON'TKNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to HH13D for next ROSTER MEMBER.

If HH13E=2 (DECEASED), set DECEASED flag =1 (YES) for ROSTER MEMBER.
If no other ROSTER MEMBERS, go to HH14.

---

# HH13F                    HH13F                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "FIRST" in bold underlined text.

**QUESTION TEXT:**

CONFIRM SPELLING OF FIRST NAME.

---

# HH13G                    HH13G                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "LAST" in bold underlined text.

**QUESTION TEXT:**

> CONFIRM SPELLING OF LAST NAME.

**PROGRAMMER INSTRUCTIONS:**

> If HH13D = 1 (YES) or 2 (NO), display ROSTER MEMBER in HHMEMBER matrix with grayed out fields upon advancing to next roster entry.
>
> Go to HH13D for next ROSTER MEMBER.
>
> If no other ROSTER MEMBERS, go to HH14.

---

## HH14        op5prsninhh        R5 OP IN HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

> Display HHMEMBER ROSTER as a grid. Display any ROSTER MEMBERS with CURRENT INT INHH flag=1 (YES)on the HHMEMBER GRID.
>
> If PROXY flag = 2 (NO) or [PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER) and INHH flag for SPOUSE/PARTNER= 1 (YES)], display "you".
>
> Else if PROXY flag=1 (YES) and INHH flag for PROXY=1 (YES) and PROXY RELATIONSHIP <> 2 (SPOUSE/PARTNER), display "you and {SP}".
>
> Otherwise, display "{SP}".
>
> Only display ROSTER MEMBERS with CURRENT INT INHH flag <> 1 (not in HH) as entries that can be selected to add to the HH Roster. Display ROSTER MEMBERS with CURRENT INT INHH flag = 1 (YES) as follows: "[{ROSTER MEMBER FIRST AND LAST NAME}, HERE]" and grayed out. For any ROSTER MEMBERS added to HH Roster at this screen, display as "[{ROSTER MEMBER FIRST AND LAST NAME}, HERE]" and grayed out.
>
> Display questions HH14-HH19 on full matrix screen.
>
> If at HH14-HH14B, do not display question test in brackets during first entry to person roster. Otherwise, display question text in brackets.
>
> If at first entry to person roster, display "first". Otherwise, display "next".
>
> If any ROSTER MEMBERS with INHH flag = 1 (YES), display "Other than the people I just asked about," and "please". Otherwise display "Please".
>
> If NEWSAMPLE flag = 1 (YES), display "Please tell me the names of all of the people who usually live (here)". Otherwise, display "{Other than the people I just asked about,} {please/Please} tell me the name of the {first/next} person who lives"

**QUESTION TEXT:**

> {[}{{Other than the people I just asked about,} {please/Please} tell me the name of the {first/next} person who lives/Please tell me the names of all of the people who usually live (here)} with {you/{SP}/you and {SP}}. Please include people temporarily absent.{]}
>
> PROBE: Is there anyone else living (here) with {you and {SP}/you/{SP}}?
>
> SELECT TO ADD TO HOUSEHOLD ROSTER, ONE AT A TIME
>
> IF PERSON NAMED IS NOT ON THE ROSTER, SELECT "NOT ON LIST" TO ADD A PERSON

## HH14A            HH14A                        NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in underlined text.
If at HH14A-B, do not display question text in brackets during first entry to person roster.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}What is (his/her) first name?{]}

CONFIRM SPELLING

**ENTER TEXT**

Length                                          45

**PROGRAMMER INSTRUCTIONS:**

Display grid with fields: First Name, Last Name, Gender, Relationship, and Age.

Display grid with SP preloaded, and any ROSTER MEMBERS with a CURRENT INT INHH flag= 1 (YES) preloaded with updated info from CURENT INT.

All rows for ROSTER MEMBERS confirmed at HH13 should be write-protected (grayed out).

For each HHMEMBER ROSTER addition, set INHH flag= 1 (YES).

Allow up to 25 row entries.

Allow movement between grid items using the arrow keys.

When exiting matrix, if any blank fields, return cursor to the blank field and display appropriate error message.

Text field is 25 char for each name field.

Go to HH20 when matrix is complete.

## HH14B            HH14B                        NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "last" in underlined text.
If at HH14A-B, do not display question text in brackets during first entry to person roster.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}What is (his/her) last name?{]}

CONFIRM SPELLING

**ENTER TEXT**

Length                                          25

## HH15            op5relatnshp                 R5 RELASHIP TO SP UPDATE AND NEW

                   op5childinhh                 R5 CHILD IN HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HOUSEHOLDRELATIONSHIP CODE LIST.

**QUESTION TEXT:**

{[}What is (his/her) last name?{]}

CONFIRM SPELLING

**CODES**

| | |
|---|---|
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 36 | FRIEND |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

If HH15 = 3 (daughter), 5 (daughter-in-law), 7 (stepdaughter), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt), set PERSON GENDER = 2 (female) and go to HH17A.
ELSE If HH15 = 4 (son), 6 (son-in-law), 8 (stepson), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle), set PERSON GENDER = 1 (male) and go to HH17A.
Otherwise, go to HH16.
If HH15 = 3 (daughter), 4 (son), 7 (stepdaughter), or 8 (stepson), set CHILDINHH flag = 1 (yes) for ROSTER PERSON.

---

**HH16**     **op5dgender**     R5 D GENDER UPDATE AND NEW

**QUESTION TEXT:**

Is {FIRSTNAME LASTNAME} male or female?

**CODES**

| | |
|---|---|
| 1 | MALE |
| 2 | FEMALE |

**PROGRAMMER INSTRUCTIONS:**

If HH16 = 1, set PERSON GENDER = 1 (male), and display "1" in matrix gender field.

If HH16 = 2, set PERSON GENDER = 2 (female), and display "2" in matrix gender field.

---

**BOX HH17**  BOX HH17  NOT ON FILE

If HH15 = 25-36, 91 OR 92, go to HH14a.

Otherwise, go to HH17A.

---

**HH17A**  op**5**birthmth (Sensitive)  R5 OTHER PERSON MONTH OF BIRTH

**DISPLAY INSTRUCTIONS:**

Display HH17A, 17B, and 17C, on the same screen.

Display "month" as underlined text.

**QUESTION TEXT:**

What is {FIRSTNAME LASTNAME}'s date of birth?

ENTER MONTH

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range 1-12

---

**HH17B**  HH17B  NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display HH17A, 17B, and 17C, on the same screen.

Display "day" as underlined text.

**QUESTION TEXT:**

[What is {FIRSTNAME LASTNAME}'s date of birth?]

ENTER DAY

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 31 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range 1-31

---

**HH17C**  op**5**birthyear (Sensitive)  R5 OTHER PERSON YEAR OF BIRTH

Display HH17A, 17B, and 17C, on the same screen.

Display "year" as underlined text.

**QUESTION TEXT:**

What is {FIRSTNAME LASTNAME}'s date of birth?

ENTER YEAR

**ENTER NUMBER**

> REFUSED
> DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Hard range: CURRENT YEAR – 110.
If HH17A ≥ 1 and HH17B ≥ 1 and HH17C ≥ 1, compute PERSON AGE as (CURRENT DATE – HH17A-C DOB) and prefill HH18.
Otherwise, go to HH19.

---

# HH18

| op5dage | R5 D OP CAT AGE UPDATE AND NEW |
| --- | --- |
| op5age (Sensitive) | R5 OTH PERSON AGE UPDATE AND NEW |

**QUESTION TEXT:**

That makes {FIRSTNAME LASTNAME} {CALCULATED AGE} today. Is that correct?

**CODES**

| 1 | YES | HH14 |
| --- | --- | --- |
| 2 | NO | HH17A |
| | REFUSED | HH14 |
| | DON'T KNOW | HH14 |

**PROGRAMMER INSTRUCTIONS:**

If HH18 = 1 (yes), write HHMEMBER AGE to PERSON ROSTER.
If HH18 = DK or RF, display "DK" or "RF" in matrix age field.
If HH18 = 2 (NO), display error message "PLEASE CORRECT THE DATE OF BIRTH INFORMATION".

---

# HH19

| op5dage | R5 D OP CAT AGE UPDATE AND NEW |
| --- | --- |
| op5age (Sensitive) | R5 OTH PERSON AGE UPDATE AND NEW |

**QUESTION TEXT:**

How old is {FIRSTNAME LASTNAME}?

ENTER AGE
IF LESS THAN 1 YEAR, ENTER 0.

**ENTER NUMBER**

| Range | 0 to 110 |
| --- | --- |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Numeric field range: 0-110.
Write PERSON AGE to PERSON ROSTER.
If HH19 = DK or RF, display "DK" or "RF" in matrix age field.

Go to HH14.

## HH20

| HH20 | | NOT ON FILE |

**QUESTION TEXT:**

IS THE HOUSEHOLD MATRIX COMPLETE?

**CODES**

| 1 | YES | SECTION CS |
|---|-----|-----------|
| 2 | NO | HH14 |

**PROGRAMMER INSTRUCTIONS:**

If HH20 = 2 (NO), display error message "GO BACK AND ADD THE PERSON".

| Derived Variables from Items in the HH Section | |
|---|---|
| **hh5dmarstat** | R5 D MARITAL STATUS AT R5 |
| **hh5dyrendmarr** | R5 D YR MARR END FROM HH2B AND HH2C |
| **op5dgender** | R5 D GENDER UPDATE AND NEW |
| **hh5dspageall** | R5 D SPOU PAR AGE UPDATE AND NEW |
| **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |
| **hh5dlvngarrg** | R5 D LIVING ARRANGEMENT |
| **hh5dhshldnum** | R5 D TOTAL NUMBER IN HOUSEHOLD |
| **hh5dhshldchd** | R5 D TOTAL CHILDREN IN HOUSEHOLD |
| **hh5dspouseid** | R5 D SPOUSE ID |

| Restricted Variables in the HH Section | |
|---|---|
| **op5rescity** | R5 CITY OF RESIDENCE |
| **op5resstate** | R5 STATE OF RESIDENCE |

---

**BOX CS1**          BOX CS1          NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to CS1
Else if any LAST INT ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and CURRENT INHH flag <>1 (NOT IN HH) for ROSTER MEMBER, go to CS1A.
Otherwise, go to Box CS1H.

---

**CS1**          CS1          NOT ON FILE

**DIPLAY INSTRUCTIONS:**

If any roster entries with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "Besides {you/{FIRST NAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}", "{do you/does SP}" and "other".

Otherwise, display "{Do you /Does SP}".

If PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "you".
Otherwise, display "{FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}".

If (PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)) and (any other roster entries with codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)), display "and" and "{FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}".

If more than one name displayed, display "and" between each one.

If PROXY flag is null or [PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER)], display "do you" or "Do you".

Otherwise, display "does SP" or "Does SP".

**QUESTION TEXT:**

{Besides {you/{ and} {FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) or 8 (STEPSON)}, {do you/does SP}}/ {Do you/Does SP}} have any {other} living children, including stepchildren?

**CODES**

| | | |
|---|---|---|
| 1 | YES | CS2 |
| 2 | NO | BOX CS2 |
| | REFUSED | BOX CS2 |
| | DON'T KNOW | BOX CS2 |

---

**CS1A**          op5chnotinhh          R5 CHILD NOT HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display "{FIRSTNAME LASTNAME}, {RELATIONSHIP}" of ANY LAST INT ROSTER MEMBERS with relationship codes

= 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and CURRENT INHH flag <> 1 (NOT INHH) and DECEASED flag <> 1 (YES) for ROSTER MEMBER below question text.

If any CURRENT INT ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and CURRENT INHH flag = 1 (IN HH), display "In addition to the child(ren) currently living with {you/SP}, at".
Otherwise, display "At".

**QUESTION TEXT:**

{In addition to the child(ren) currently living with {you/SP}, at/At} the time of the last interview in {LAST INT MONTH AND YEAR}, we recorded that {you/SP} had the following child(ren) or stepchild(ren). READ NAMES AND RELATIONSHIPS LISTED BELOW.

{FIRSTNAME LASTNAME}, {RELATIONSHIP}

Is this information still correct?

IF ANY CHILD OR STEPCHILD IS DECEASED, SELECT CODE 2 UPDATES NEEDED

IF NAME(S) REFUSED, READ RELATIONSHIP(S)

CONFIRM SPELLING

**CODES**

| | | |
|---|---|---|
| 1 | INFO CORRECT | CS1E |
| 2 | UPDATES NEEDED | |
| | REFUSED | CS1E |
| | DON'T KNOW | CS1E |

---

# CS1B　　　　op5chnotinhh　　　　R5 CHILD NOT HOUSEHOLD UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display ROSTER as a grid.

Display questions CS1B-CS1G on full matrix screen.

Prefill grid with LAST INT information FIRST NAME, LASTNAME, RELATIONSHIP, and GENDER for PERSON ROSTER MEMBERS with LAST INT RELATIONSHIP CODE = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON).

Display "{FIRSTNAME LASTNAME}, {RELATIONSHIP}" of first, next LAST INT ROSTER MEMBER with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) below question text.

For the first ROSTER MEMBER, display "First".
Otherwise, display "Next"

**QUESTION TEXT:**

{First/Next} we recorded

{FIRSTNAME LASTNAME} {RELATIONSHIP}

Is this correct?

CONFIRM SPELLING

**CODES**

| | | |
|---|---|---|
| 1 | INFO CORRECT | CS1E |
| 2 | UPDATES NEEDED | |

| 3 | CHILD DECEASED | BOX CS1H |
|---|---|---|
| | REFUSED | CS1E |
| | DON'T KNOW | CS1E |

**PROGRAMMER INSTRUCTIONS:**
>    If CS1b = 3 (DECEASED), set DECEASED flag = 1 (YES) for ROSTER MEMBER and go to BOX CS1H.

---

## CS1C                              CS1C                              NOT ON FILE

**DISPLAY INSTRUCTIONS:**
>    Prefill name in response field and allow corrections.
>    Do not display question text in brackets during first entry to person roster.
>    Otherwise, display question text in brackets.
>
>    Display "first" as underlined text.

**QUESTION TEXT:**
>    {[}What is (his/her) correct first name?{]}
>
>    {FIRSTNAME LASTNAME} {RELATIONSHIP}
>
>    CONFIRM SPELLING

**ENTER TEXT**
>                   Length                              25

---

## CS1D                              CS1D                              NOT ON FILE

**DISPLAY INSTRUCTIONS:**
>    Prefill name in response field and allow corrections.
>
>    Display "last" as underlined text.

**QUESTION TEXT:**
>    {[}What is (his/her) correct last name?{]}
>
>    {FIRSTNAME LASTNAME} {RELATIONSHIP}
>
>    CONFIRM SPELLING

**ENTER TEXT**
>                   Length                              25

**PROGRAMMER INSTRUCTIONS:**
>    Write updated first and last names to the person roster for ROSTER MEMBER.  Set a NAMECHANGE flag to
>    indicate that the name was changed.

---

## CS1E              op5rescity (Restricted)          R5 CITY OF RESIDENCE
                     op5resstate (Restricted)         R5 STATE OF RESIDENCE

**QUESTION TEXT:**
>    Does {FIRSTNAME LASTNAME}, {RELATIONSHIP} currently live in {CITY}, {STATE}?
>
>    IF CITY OR STATE MISSING, DON'T KNOW, OR REFUSED, SELECT CODE 2 UPDATES NEEDED.

**CODES**

| | | |
|---|---|---|
| 1 | INFO CORRECT | BOX CS1H |
| 2 | UPDATES NEEDED | |
| | REFUSED | BOX CS1H |
| | DON'T KNOW | BOX CS1H |

**PROGRAMMER INSTRUCTIONS:**

If CS1E = 1 (YES), write LAST INT CITY and STATE to roster as CURRENT INT CITY and STATE for ROSTER MEMBER and go to BOX CS1H.

---

# CS1F                    op5rescity (Restricted)          R5 CITY OF RESIDENCE

**DISPLAY INSTRUCTIONS:**

Display "CITY" in underlined text.

Display CS7a and CS7b on the same screen.

Display CITY for ROSTER MEMBER from PERSON ROSTER and prefill city response field if already collected. Allow update to city field if prefilled and allow enter if field is prefilled and no updates are made.

**QUESTION TEXT:**

In what city and state does {FIRSTNAME LASTNAME} live?

ENTER CITY

CONFIRM SPELLING

**ENTER TEXT**

| | | |
|---|---|---|
| Length | | 25 |
| REFUSED | | |
| DON'T KNOW | | |

---

# CS1G                    op5resstate (Restricted)          R5 STATE OF RESIDENCE

**DISPLAY INSTRUCTIONS:**

Display CS7a and CS7b on the same screen.

Display STATE for ROSTER MEMBER from PERSON ROSTER and prefill state response field if already collected. Allow update to city field if prefilled and allow enter if field is prefilled and no updates are made.

**QUESTION TEXT:**

In what city and state does {FIRSTNAME LASTNAME} live?

ENTER STATE

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND PRESS ENTER TO SELECT

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use lookup file (59STATERR) of state names.

Write updated PERSON CITY and STATE to PERSON ROSTER for ROSTER MEMBER.

---

| **BOX CS1H** | BOX CS1H | NOT ON FILE |
|---|---|---|

If any other LAST INT ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and INHH flag <>1 (NOT IN HH), and DECEASED flag <> 1 for ROSTER MEMBER, go to CS1B.

Else if SP MARITAL STATUS=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to CS1H.

Otherwise, go to Box CS14.

---

| **CS1H** | CS1H | NOT ON FILE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If any roster entries with a new CURRENT INT ROSTER MEMBER with CURRENT INT relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "Besides {you/{FIRST NAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}", "{do you/does SP}" and "other".

Otherwise, display "{Do you /Does SP}".

If PROXY flag = 1 (YES) and ROSTER MEMBER CURRENT INT RELATIONSHIP code = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER, or 8 (STEPSON) and ROSTER MEMBER is new in CURRENT INT, display "you". Otherwise, display "{FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}".

If (PROXY flag = 1 (YES) and CURRENT INT RELATIONSHIP code = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)) and (any other new roster entries in CURRENT INT and CURRENT INT codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)), display "and" and "{FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}".

If more than one name displayed, display "and" between each one.

If PROXY flag is null, display "do you" or "Do you".
Otherwise, display "does SP" or "Does SP".

**QUESTION TEXT:**

{Besides {you/{and} {FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) or 8 (STEPSON)}, {do you/does SP}}/ {Do you/Does SP}} have any {other} new stepchildren?

**CODES**

| 1 | YES | CS2 |
|---|---|---|
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

| **BOX CS2** | BOX CS2 | NOT ON FILE |
|---|---|---|

IF PROXY RESPONDENT flag = 1 (YES) and [PROXY ROSTER MEMBER relationship code = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) or 8 (STEPSON)] and INHOUSEHOLD flag = 1 (YES), set CHILDINHH flag = 1 (YES) for PROXY ROSTER MEMBER.

If NEWSAMPLE flag = 1 (YES) and any roster entries with [(relationship code = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) or 8 (STEPSON)) and INHH flag = 1 (YES)], go to CS9PRE.

Else if NEWSAMPLE flag = 1 (YES), go to CS14.

Else if PROXY RESPONDENT flag = 1 (YES) and [PROXY ROSTER MEMBER relationship code = 7 (STEPDAUGHTER) or 8 (STEPSON)] and ROSTER MEMBER is new in CURRENT INT and INHH flag <>1 (NOT IN HH) for PROXY ROSTER MEMBER, go to CS7a.

Else if any new in CURRENT INT roster members with [(relationship code= 3(DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) or 8 (STEPSON)) and INHH flag = 1 (YES), go to CS9.
Otherwise, go to BOX CS14.

---

## CS2                              CS2                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag= 1 (YES), display "daughter, son,".

Display CHILDREN ROSTER as a grid.

Display questions CS2A-CS7B on full matrix screen.

Do not display question text in brackets during first entry to person roster.
Otherwise, display question text in brackets.

Display "first" as underlined text.

Display "PRESS ENTER IF MATRIX IS COMPLETE" for first empty roster entry.

**QUESTION TEXT:**

{[}Please tell me their names and whether they are {your/{SP}'s} {daughter, son,} stepdaughter, or stepson.{]}

What is (his/her) first name?

CONFIRM SPELLING

PROBE IF NECESSARY: {Do you/Does {SP}} have any other living children?

{PRESS ENTER IF MATRIX IS COMPLETE}

**PROGRAMMER INSTRUCTIONS:**

For each ROSTER addition, set CHILDNOTINHH flag= 1 (YES) for ROSTER PERSON.
Allow up to 15 row entries.
Allow movement between grid items using the arrow keys.
Go to CS8 when matrix is complete

---

## CS2A                             CS2A                        NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in underlined text.

**QUESTION TEXT:**

What is (his/her) first name?

CONFIRM SPELLING

**ENTER TEXT**

Length                                          25

**CS2B**                       CS2B                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "last" in underlined text.

**QUESTION TEXT:**

What is (his/her) last name?

CONFIRM SPELLING

**ENTER TEXT**

Length                                          25

---

# CS3                          op5relatnshp                R5 RELASHIP TO SP UPDATE AND NEW

op5dgender                  R5 D GENDER UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display CHILD RELATIONSHIP CODE LIST

If NEWSAMPLE flag = 1 (YES), display relationship codes 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER) and 8 (STEPSON).

Otherwise display 7 (STEPDAUGHTER) and 8 (STEPSON).

**QUESTION TEXT:**

What is {FIRSTNAME LASTNAME}'s relationship to {you/SP}?

PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 3 | DAUGHTER |
| 4 | SON |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |

---

# CS4A                         op5birthmth (Sensitive)     R5 OTHER PERSON MONTH OF BIRTH

**DISPLAY INSTRUCTIONS:**

Display "month" in underlined text.

**QUESTION TEXT:**

What is {FIRSTNAME LASTNAME}'s date of birth?

ENTER MONTH

**ENTER NUMBER**

Range                                   1 to 12
REFUSED
DON'T KNOW

---

**CS4B**                       CS4B                         NOT ON FILE

**DISPLAY INSTRUCTIONS:**

> Display CS4a, CS4b, and CS4c, on the same screen.

> Display "day" as underlined text.

**QUESTION TEXT:**

> [What is {FIRSTNAME LASTNAME}'s date of birth?]
>
> ENTER DAY

**ENTER NUMBER**

| | | |
|---|---|---|
| Range | | 1 to 31 |
| REFUSED | | |
| DON'T KNOW | | |

---

## CS4C　　　　　　　op5birthyear (Sensitive)　　R5 OTHER PERSON YEAR OF BIRTH

**DISPLAY INSTRUCTIONS:**

> Display CS4a, CS4b, and CS4c, on the same screen.

> Display "year" as underlined text.

**QUESTION TEXT:**

> What is {FIRSTNAME LASTNAME}'s date of birth?
>
> ENTER YEAR

**ENTER NUMBER**

| | | |
|---|---|---|
| Range | | 1 to 12 |
| REFUSED | | |
| DON'T KNOW | | |

**PROGRAMMER INSTRUCTIONS:**

> Hard range: CURRENT YEAR – 95.
> Soft range: (CURRENT YEAR – 20) – (CURRENT YEAR – 75)
> If CS4c violates hard range, display error message "YEAR OF BIRTH OUTSIDE OF RANGE, CONFIRM WITH RESPONDENT AND RE-ENTER".

> If CS4a ≥ 1 and CS4b ≥ 1 and CS4c ≥ 1, compute PERSON AGE as (CURRENT DATE – CS4a-c DOB) and prefill CS5. Otherwise, go to CS6.

---

## CS5　　　　　　　op5age (Sensitive)　　　R5 OTH PERSON AGE UPDATE AND NEW

　　　　　　　　　　　op5dage　　　　　　　　R5 D OP CAT AGE UPDATE AND NEW

**QUESTION TEXT:**

> That makes {FIRSTNAME LASTNAME} {CALCULATED AGE} today. Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | CS7A |
| 2 | NO | CS4A |
| | REFUSED | CS7A |
| | DON'T KNOW | CS7A |

**PROGRAMMER INSTRUCTIONS:**

If CS5 = 1 (yes), write person AGE to PERSON ROSTER.

If CS5 = DK or RF, display "DK" or "RF" in matrix age field.

If CS5 = 2 (NO), display error message "INCONSISTENT ANSWERS. VERIFY WITH RESPONDENT AND RE-ENTER ANSWER(S)."

---

| CS6 | op5age (Sensitive) | R5 OTH PERSON AGE UPDATE AND NEW |
|---|---|---|
| | op5dage | R5 D OP CAT AGE UPDATE AND NEW |

**QUESTION TEXT:**

How old is {FIRSTNAME LASTNAME}?

ENTER AGE

IF LESS THAN 1 YEAR, ENTER 0

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 95 |
| Soft Range | 15 to 75 |
| REFUSED | |
| DON'T Know | |

**PROGRAMMER INSTRUCTIONS:**

If CS5 = 1 (yes), write person AGE to PERSON ROSTER.

If CS5 = DK or RF, display "DK" or "RF" in matrix age field.

---

| CS7A | op5rescity (Restricted) | R5 CITY OF RESIDENCE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

Display "CITY" in underlined text.

Display CS7a and CS7b on the same screen

**QUESTION TEXT:**

In what city and state does {FIRSTNAME LASTNAME} live?

ENTER CITY

CONFIRM SPELLING

**ENTER TEXT**

| | |
|---|---|
| Length | 25 |
| REFUSED | |
| DON'T KNOW | |

---

| CS7B | op5resstate (Restricted) | R5 STATE OF RESIDENCE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

Display CS7a and CS7b on the same screen

**QUESTION TEXT:**

[In what city and state does {FIRSTNAME LASTNAME} live?]

**ENTER TEXT**

>REFUSED
>DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

>Use lookup file (59STATETERR) of state names.
>Write PERSON CITY and STATE to PERSON ROSTER.
>Go to CS2A

---

| CS8 | CS8 | NOT ON FILE |
|-----|-----|-------------|

**DISPLAY INSTRUCTIONS:**

>If NEWSAMPLE flag <> 1 (YES), display "NEW".

**QUESTION TEXT:**

>IS THE{ NEW} CHILDREN MATRIX COMPLETE?

**CODES**

| 1 | YES | |
|---|-----|---|
| 2 | NO | CS2A |

PROGRAMMER INSTRUCTIONS:

>If CS8 = 2 (NO), display error message "GO BACK AND ADD THE PERSON".

---

| BOX CS9PRE | BOXCS9PRE | NOT ON FILE |
|------------|-----------|-------------|

>If any ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and DECEASED flag <> 1 (YES) for ROSTER MEMBER, go to CS9PRE.
>Otherwise, go to BOX CS14.

---

| CS9PRE | CS9PRE | NOT ON FILE |
|--------|--------|-------------|

**QUESTION TEXT:**

>Now I have a few questions about each of {your/SP's} children.
>
>PRESS 1 AND ENTER TO CONTINUE

---

| CS9 | op5educhild | R5 HH9 CHILD EDUC WHEN ADDED |
|-----|-------------|------------------------------|
| | op5leveledu | R5 OP HIGHEST ED WHEN ADDED |

**DISPLAY INSTRUCTIONS:**

>Display ROSTER as a grid.
>Display questions CS9-CS12 on full matrix screen.

**QUESTION TEXT:**

>SHOWCARD CS1

What is the highest degree or level of school {FIRSTNAME LASTNAME} completed?

**CODES**

| | |
|---|---|
| 1 | NO SCHOOLING COMPLETED |
| 2 | 1ST-8TH GRADE |
| 3 | 9TH-12TH GRADE (NO DIPLOMA) |
| 4 | HIGH SCHOOL GRADUATE (HIGH SCHOOL DIPLOMA OR EQUIVALENT) |
| 5 | VOCATIONAL, TECHNICAL, BUSINESS, OR TRADE SCHOOL CERTIFICATE OR DIPLOMA (BEYOND HIGH SCHOOL LEVEL) |
| 6 | SOME COLLEGE BUT NO DEGREE |
| 7 | ASSOCIATE'S DEGREE |
| 8 | BACHELOR'S DEGREE |
| 9 | MASTER'S, PROFESSIONAL, OR DOCTORAL DEGREE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Display grid with FIRSTNAME LASTNAME of roster entries with ROSTER MEMBERS new in CURRENT INT and CURRENT INT relationship codes = 7 (STEPDAUGHTER), or 8 (STEPSON)

Allow movement between grid items using the arrow keys.

When exiting matrix, if any blank fields in matrix CS2A-CS7B, or matrix CS9-CS12 for any new stepchild added in CURRENT INT, return cursor to the blank field and display appropriate error message.

Go to CS13 when matrix is complete.

Write education level to PERSON ROSTER.

---

**CS10**  op5martlstat  R5 CHILD MARITL STAT WHEN ADDED

**QUESTION TEXT:**

Is {FIRSTNAME LASTNAME} married, living with a partner, separated, divorced, widowed, or never married?

**CODES**

| | |
|---|---|
| 1 | MARRIED |
| 2 | LIVING WITH A PARTNER |
| 3 | SEPARATED |
| 4 | DIVORCED |
| 5 | WIDOWED |
| 6 | NEVER MARRIED |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Write Marital status to PERSON ROSTER.

---

**CS11**  op5numchldrn  R5 CHILD NUM CHILDRN WHEN ADDED

**QUESTION TEXT:**

How many living children does {FIRSTNAME LASTNAME} have?

IF NEEDED: Include step and adopted children.

ENTER NUMBER OF CHILDREN

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 24 |
| Soft Range | 0 to 10 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 0-24. Soft range: 0-10.

Write number of children to PERSON ROSTER.

If CS11 = 0, RF, or DK go to CS9.

---

## CS12                    op5anychdu18                    R5 CHILD CHILD U 18 WHEN ADDED

**QUESTION TEXT:**

Are any of {FIRSTNAME LASTNAME}'s children under age 18?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | CS9 |
| | REFUSED | CS9 |
| | DON'T KNOW | CS9 |

---

## CS12A                    op5numchdu18                    R5 CHILD NUM CHILD U 18 WHEN ADDED

**QUESTION TEXT:**

How many children are under age 18?

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 20 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Write number of children under 18 to PERSON ROSTER.
If CS12a >CS11, display error message "NUMBER OF CHILDREN UNDER 18 CANNOT BE GREATER THAN TOTAL NUMBER OF CHILDREN".
Write FIRST NAME, LAST NAME, RELATIONSHIP, DOB, AGE, CITY, STATE, EDUCATION LEVEL, MARITAL STATUS, # OF CHILDREN, AND # OF CHILDREN UNDER 18 TO PERSON ROSTER FOR ROSTER MEMBER. Go to CS9.

## BOX CS13                    BOXCS13                    NOT ON FILE

If any other ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and DECEASED flag <> 1 (YES) for ROSTER MEMBER, go to CS9.
Otherwise, go to CS13.

---

## CS13                    CS13                    NOT ON FILE

**QUESTION TEXT:**

IS THE CHILDREN MATRIX COMPLETE?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | CS9 |

**PROGRAMER INSTRUCTIONS:**

If CS13 = 2 (NO), display error message "GO BACK AND ADD THE PERSON".

---

| **BOX CS14** | **BOX CS14** | NOT ON FILE |
|---|---|---|

If LAST INT CS14 = 0, go to BOX CS15.

Otherwise, go to CS14.

---

| **CS14** | **cs5sistrsnum** | R5 CS14 NUMBER OF LIVING SISTERS |
|---|---|---|

**QUESTION TEXT:**

How many living sisters {do you/does SP} have?

ENTER NUMBER OF SISTERS

**ENTER
NUMBER**

| | |
|---|---|
| Range | 0 to 20 |
| Soft Range | 0 to 10 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 0-20.
Soft range: 0-10.

---

| **BOX CS15** | **BOX CS15** | NOT ON FILE |
|---|---|---|

If LAST INT CS15 = 0, go to Section SN – Social Network

Otherwise, go to CS15.

---

| **CS15** | **cs5brthrsnum** | R5 CS15 NUMBER OF LIVNG BROTHERS |
|---|---|---|

**QUESTION TEXT:**

How many living brothers {do you/does SP} have?

ENTER NUMBER OF BROTHERS

**ENTER
NUMBER**

| | |
|---|---|
| Range | 0 to 20 |
| Soft Range | 0 to 10 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 0-20.
Soft range: 0-10.

**Derived Variables from Items in CS Section**

| | |
|---|---|
| **cs5dnumchild** | R5 D NUMBER OF CHILDREN |
| **cs5dnmstpchd** | R5 D NUMBER OF STEPCHILDREN |
| **cs5dnumdaugh** | R5 D NUMBER OF DAUGHTERS |
| **cs5dnumson** | R5 D NUMBER OF SONS |
| **op5dchilddec** | R5 D CHILD NOT IN HH DIED |
| **op5dgender** | R5 D GENDER UPDATE AND NEW |
| **op5dage** | R5 D OP CAT AGE UPDATE AND NEW |

---

## BOX SN1                    BOX SN1                    NOT ON FILE

If PROXY flag = 1 (YES), go to Section HO – Home Environment.
Otherwise, go to SN1PRE

---

## SN1PRE                    SN1PRE                    NOT ON FILE

**QUESTION TEXT:**

The next questions are about who you talk to about important things in your life. This may include good or bad things that happen to you, problems you are having, or important concerns you may have.

PRESS 1 AND ENTER TO CONTINUE

---

## SN2                    op5soclntwrk                    R5 SN2 PART OF SP SOCIAL NETWORK

**DISPLAY INSTRUCTIONS:**

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP if any person has been added to the PERSON ROSTER other than the SP.

Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

For additions to the PERSON ROSTER, display SOCIAL NETWORK RELATIONSHIP CODE LIST.

Display "SP HAS NO ONE TO TALK TO" as first option on the PERSON ROSTER DISPLAY.

Display "UP TO 5 PEOPLE" in bold underlined text.

**QUESTION TEXT:**

Looking back over the last year, who are the people you talked with most often about important things?

Please tell me their first and last name and their relationship to you.

SELECT/ENTER UP TO 5 PEOPLE IN THE ORDER SP NAMES PEOPLE

PROBE ONCE IF SP NAMES FEWER THAN 5 PEOPLE:   Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

SN3.   [What is (his/her) first name?]      CONFIRM SPELLING
SN4.   [What is (his/her) last name?]      CONFIRM SPELLING
SN5.   [What is (his/her) relationship to {you/SP}?]    PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |

| 15 | MOTHER-IN-LAW |
| --- | --- |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-SPOUSE/PARTNER |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SERVICE/SOMEONE FROM THE PLACE SP LIVES |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

Allow up to 5 selections to PERSON ROSTER.

Display "CTRL/P" in red bolded font.

If "SP HAS NO ONE TO TALK TO" is selected, set NOONETOTALKTO flag = 1 (yes).

If "SP HAS NO ONE TO TALK TO" is selected, disallow other SN roster entries or selections and go to Section HO – Home Environment.

If no additions to or selections from the PERSON ROSTER, go to Section HO – Home Environment.

If other roster selections and "SP HAS NO ONE TO TALK TO" is selected, display message "INCONSISTENT ANSWER. NO ONE TO TALK TO CANNOT BE SELECTED WITH OTHER ROSTER ENTRIES."

For each roster selection other than "SP HAS NO ONE TO TALK TO" at SN2, set SOCIAL NETWORK flag = 1 (YES).

If more than 5 roster members selected at SN2, display error message, "YOU MAY ONLY SELECT 5 PEOPLE."


For each addition to the PERSON ROSTER:

If 5 (daughter-in-law), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt) selected, set PERSON GENDER = 2 (female)

Else if 6 (son-in-law), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle) selected, set PERSON GENDER = 1 (male)

---

**BOX SN6**          **BOX SN6**          NOT ON FILE

**QUESTION TEXT:**

Display grid with ROSTER MEMBERS with SOCIAL NETWORK flag = 1 (YES) and (INHH flag <> 1 (YES) or relationship <> 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)).

Display grid with fields: First Name, Last Name, How Related, Gender, Age Group, City, and State. Gender, Age Group, City, and State can be edited.

When entering a new field, start cursor after last entry value or text.

Allow movement between grid items using the arrow keys.

Loop through BOX SN6A through BOX SN9 for each ROSTER MEMBER selected or added at SN2.

---

**BOX SN6A**          **BOX SN6A**          NOT ON FILE

If ROSTER MEMBER has GENDER = (NULL, RF or DK), go to SN6.
Otherwise, go to BOX SN7.

---

**SN6**          **op5dgender**          R5 D GENDER UPDATE AND NEW

**QUESTION TEXT:**

If NOT OBVIOUS, ASK:

Is {FIRST NAME LAST NAME} male or female?

**CODES**
1          MALE
2          FEMALE
          REFUSED
          DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Write PERSON GENDER to PERSON ROSTER.

---

**BOX SN7**          **BOX SN7**          NOT ON FILE

If AGE CATEGORY for ROSTER MEMBER <> (NULL, RF or DK), go to SN7.
Else if AGE CATEGORY for ROSTER MEMBER = (NULL, RF or DK), go to SN7A.

Otherwise, go to BOX SN8.

---

**SN7**          **op5dcatgryag**          R5 D OTH PERSN SN CAT AGE

**QUESTION TEXT:**

Is {FIRST NAME LAST NAME} still {LAST INT AGE CATEGORY} years old?

| | | |
|---|---|---|
| 1 | INFO CORRECT | BOX SN8 |
| 2 | UPDATES NEEDED | |
| | REFUSED | BOX SN8 |
| | DON'T KNOW | BOX SN8 |

---

# SN7A                    op5dcatgryag              R5 D OTH PERSN SN CAT AGE

**QUESTION TEXT:**

How old is {FIRST NAME LAST NAME}?

**CODES**

| | |
|---|---|
| 1 | UNDER 30 |
| 2 | 30-39 |
| 3 | 40-49 |
| 4 | 50-59 |
| 5 | 60-69 |
| 6 | 70-79 |
| 7 | 80-89 |
| 8 | 90+ |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Write AGE CATEGORY to PERSON ROSTER.

---

# BOX SN8                 BOX SN8                    NOT ON FILE

**QUESTION TEXT:**

If CITY for ROSTER MEMBER <> (NULL, RF or DK), go to SN8.
Else if CITY for ROSTER MEMBER = (NULL, RF or DK), go to SN8A.
Otherwise, go to BOX SN9.

---

# SN8                     SN8                        NOT ON FILE

**QUESTION TEXT:**

Does {FIRST NAME LAST NAME} still live in {CITY, STATE}?

CONFIRM SPELLING

**CODES**

| | | |
|---|---|---|
| 1 | INFO CORRECT | BOX SN9 |
| 2 | UPDATES NEEDED | BOX SN9 |
| | REFUSED | |
| | DON'T KNOW | BOX SN9 |

---

# SN8A                    op5rescity                 R5 CITY OF RESIDENCE

**DISPLAY INSTRUCTIONS:**

Display SN8a and 8b on the same screen.
Display "city" as underlined text.

**QUESTION TEXT:**

Where does {FIRST NAME LAST NAME} live?

[What is {FIRST NAME LAST NAME}'s city?]

CONFIRM SPELLING

**ENTER TEXT**

Length                                                          25

## SN8B                      op5resstate                R5 STATE OF RESIDENCE

**DISPLAY INSTRUCTIONS:**
Display SN8a and 8b on the same screen.
Display "state" as underlined text.

**QUESTION TEXT:**
[What is {FIRST NAME LAST NAME}'s state?]

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND
PRESS ENTER TO SELECT

**PROGRAMMER INSTRUCTIONS:**
Use lookup file (59STATETERR) of state names
Display state name response label.

Write PERSON CITY and STATE to PERSON ROSTER.

## BOX SN9                   BOX SN9                     NOT ON FILE

Go to BOX SN6A for next ROSTER MEMBER selected or added at SN2.
If no other selections or additions, go to SN9.

## SN9                       SN9                         NOT ON FILE

**QUESTION TEXT:**
IS THE SOCIAL NETWORK MATRIX COMPLETE?

**CODES**

| | | |
|---|---|---|
| 1 | YES | Section HO |
| 2 | NO | SN2 |

| Derived Variables from Items in SN Section | |
|---|---|
| **sn5dnumsn** | R5 D NUMBER IN SOCIAL NETWORK |
| **op5dcatgryag** | R5 D OTH PERSN NEW SN CAT AGE |
| **op5dsocwrkfl** | R5 D LIKELY SOCIAL NETWRK MEMBER |
| **op5dgender** | R5 D GENDER UPDATE AND NEW |

| Flag Variables set in SN Section | |
|---|---|
| **fl5noonetalk** | R5 F SN SP HAS NO ONE TO TALK TO |

---

## HO1PRE                    HO1PRE                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
>       If STRUCTURE flag = 2 (MULTI-UNIT), display "building".
>       Otherwise, display "home".

**QUESTION TEXT:**
>       Now I have some questions about {your/SP's} {home/building}.
>
>       PRESS 1 AND ENTER TO CONTINUE

---

## HO1                    ho5entrstair            R5 HO1 ENTRANCE STAIRS OUTSIDE

**QUESTION TEXT:**
>       Thinking about the entrance that {you use/SP uses} most often, are there stairs or a step up or down to get into {your/SP's} {home/building} from outside?

**CODES**
|   |   |
|---|---|
| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## BOX HO2                    BOX HO2                    NOT ON FILE

>       If STRUCTURE flag = 2 (multi-unit), go to HO2.
>       ELSE,  go to HO3.

---

## HO2                    ho5entrccomn            R5 HO2 ENTRANCE COMMON OR PRIVAT

**QUESTION TEXT:**
>       Is this a common or shared entrance, or is it an entrance directly into {your/SP's} {home/apartment/room/unit/suite/other}?

**CODES**
|   |   |
|---|---|
| 1 | COMMON OR SHARED ENTRANCE |
| 2 | ENTRANCE DIRECTLY INTO HOME |
|   | REFUSED |
|   | DON'T KNOW |

---

## HO3                    ho5entrnramp            R5 HO3 RAMP AT ENTRANCE

**QUESTION TEXT:**
>       Whether or not {you use/SP uses} it, does this entrance have a ramp?

**CODES**
|   |   |
|---|---|
| 1 | YES |
| 2 | NO |
|   | REFUSED |

DON'T KNOW

---

**BOX HO4**       **BOX HO4**       NOT ON FILE

If NEW RESIDENCE flag = 1 and STRUCTURE flag = 2 (multi-unit) and RE9= 2 (multiple floors), then go to HO4, variable text [a].

Else if NEW RESIDENCE flag = 1 and STRUCTURE flag = 2 (multi-unit) and RE9=1 (single floor), then go to HO4, variable text [c].

Otherwise, go to BOX HO5.

---

**HO4**       **ho5bldgamen1**       R5 HO4A NEW RES BLDG HAS ELEVATOR

      **ho5bldgamen2**       R5 HO4B NEW RES BLDG STAIR LIFT GLIDE

      **ho5bldgamen3**       R5 HO4C NEW RES BLDG COMMN SPACE MEALS

      **ho5bldgamen4**       R5 HO4D NEW RES BLDG SPACE SOCIAL EVENT

**DISPLAY INSTRUCTIONS:**

If at HO4a do not display brackets in question text.
If at HO4c and RE9= 1 (single floor), do not display brackets in question text.
Otherwise, display brackets.

Use "Same Question Stem" display

**QUESTION TEXT:**

{[}Does the building that {you live/SP lives} in have{]}

{variable text [a-d]}

RESPONSE [1] a. an elevator?
RESPONSE [2] b. a stair lift or stair glide?
RESPONSE [3] c. common or shared spaces that are used for meals?
RESPONSE [4] d. common or shared spaces that can be used for socializing?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

---

**BOX HO5**       **BOX HO5**       NOT ON FILE

If STRUCTURE flag = 2 (multi-unit), go to HO10PRE.

Otherwise, go to HO5

---

**HO5**       **ho5levelsflr**       R5 HO5 NUMBR OF LEVELS OR FLOORS

**QUESTION TEXT:**

How many levels or floors are in {your/SP's} home, including a basement if {you have/{he/she} has} one?

**CODES**

| | | |
|---|---|---|
| 1 | 1 | HO10PRE |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4+ | |
| | REFUSED | |
| | DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

If HO5 = 1 (living space on one floor), set ONE FLOOR flag = 1

---

## HO8

| | ho5homeamen1 | R5 HO8A BED KITCHN BATH SAME FLR |
|---|---|---|
| | ho5homeamen2 | R5 HO8B HOME HAS ELEVATOR |
| | ho5homeamen3 | R5 HO8C HOME HAS STAIR LFT GLIDE |

**DISPLAY INSTRUCTIONS:**

If at HO8a, do not display brackets in question text. Otherwise, display brackets.

Use "Same Question Stem" display

**QUESTION TEXT:**

{[}Whether or not {you use/SP uses} it, does {your/SP's} home have{]}

{variable text [a-c]}

RESPONSE [1] a. a bedroom, kitchen, and full bathroom with a shower or tub on the same floor?
RESPONSE [2] b. an elevator?
RESPONSE [3] c. a stair lift or stair glide?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

---

## HO10PRE

| | HO10PRE | NOT ON FILE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If HOTYPE flag = 1 (HOME), display "home".
Else if HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".

**QUESTION TEXT:**

Now, I'd like to ask you some questions about the inside of {your/SP's}
{home/apartment/unit/suite/room/other}.

---

## BOX HO10                    BOX HO10                    NOT ON FILE

If NEW RESIDENCE flag = 1 and FACILITY flag = 1, go to HO10.
Otherwise, go to HO11.

---

## HO10                    ho5bathprivt                    R5 HO10 NEW FAC RES PRIV BATH

**DISPLAY INSTRUCTIONS:**

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".

**QUESTION TEXT:**

Does {your/SP's} {apartment/unit/suite/room/other} have a private bathroom with a shower or tub?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HO11

| | ho5bathamen1 | R5 HO11A BATH HAS BATHTUB |
|---|---|---|
| | ho5bathamen2 | R5 HO11B BATH HAS SHOWER STALL |
| | ho5bathamen3 | R5 HO11C BATH GRAB BAR IN SHOWER |
| | ho5bathamen4 | R5 HO11D BATH SEAT FR SHOWER TUB |
| | ho5bathamen5 | R5 HO11E BATH RAISED TOILET SEAT |
| | ho5bathamen6 | R5 HO11F BATH GRAB BARS TOILET |
| | ho5bathamen7 | R5 HO11G BATH MED EMERGNCY SYSTM |

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1, and HO10= 1 (private shower or tub), display "the bathroom in {your /his/her} {apartment/unit/suite/room/other} have"

If FACILITY flag = 1, and HO10=2 (no private shower or tub), display "{your/his/her} bathroom have"

Otherwise display "{your/{his/her}} home"

Use "Same Question Stem" display

If at HO11a, do not display question text in brackets.
Otherwise, display question text in brackets.

For HO11b:
If HO11a = 1 (yes), display "separate from the tub".
Otherwise, use null display.

For HO11c and HO11d:

If HO11a=2 and HO11b=2 then display "PLEASE CONFIRM: {SP} HAS NO ACCESS TO A BATHTUB AND NO ACCESS TO A SHOWER" before displaying HO11e.

If HO11a= 2 (no bathtub) and HO11b = 1 (yes, shower stall), display "shower"
If HO11a = 1 (yes, bathtub) and HO11b = 2 (no shower stall), display "tub area"
If HO11a = 1 (yes, bathtub) and HO11b = 1(yes, shower stall), display "shower or tub area"

**QUESTION TEXT:**

{[}Whether or not {you use/SP uses} it, does {the bathroom in {your /{his/her}} {apartment/unit/suite/room/other}/{your/{his/her}} bathroom/{your/{his/her}} home } have{[}

{variable text [a-g]}

RESPONSE [1] a. a bathtub?
RESPONSE [2] b. a shower stall {separate from the tub}?
RESPONSE [3] c. a grab bar in the {shower/tub area/shower or tub area}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

RESPONSE [4] d. a seat for the {shower/tub/shower or tub}?

IF NEEDED: This includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

RESPONSE [5] e. a raised toilet or raised toilet seat?
RESPONSE [6] f. grab bars around the toilet?
RESPONSE [7] g. a medical emergency system to call someone for help?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-f sequence until all rows have been displayed.

If HO11a=2 (no) and HO11b=2 (no) then set BATHGRABBAR flag=2, set BATHSEAT flag=2, and skip to HO11e.

If FACILITY flag = 1, go to HO12 after HO11f.
Otherwise, display [RESPONSE 7] and variable text {g}

IF HO11c=1 (yes), set BATHGRABBAR flag = 1 (yes)
IF HO11d=1 (yes), set BATHSEAT flag = 1 (yes)
IF HO11e=1 (yes), set RAISED TOILET flag = 1 (yes)
IF HO11f=1 (yes), set TOILETGRABBAR flag = 1 (yes)

| BOX HO12 | BOX HO12 | NOT ON FILE |
|---|---|---|

If NEW RESIDENCE flag = 1 and FACILITY FLAG = 1 (YES), GO TO HO12.
ELSE GO TO HO14.

**HO12**  ho5kitchnprv  R5 HO12 NEW FAC RES PRIV KITCHEN

**QUESTION TEXT:**

Does {your/SP's} {apartment/room/unit/suite/other} have a private kitchen or private kitchen area?

IF NEEDED: A private kitchen area is a place in your home where you can store food and prepare simple meals or snacks.

**CODES**

| | | |
|---|---|---|
| 1 | YES | HO14 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## HO13    ho5kitchncom    R5 HO13 NEW FAC RES COMMON KITCHEN

**QUESTION TEXT:**

Is there a kitchen area in the building where people who live {here/where SP lives} can store food or prepare simple meals or snacks?

**CODES**

| | | |
|---|---|---|
| 1 | YES | SECTION EM |
| 2 | NO | SECTION EM |
| | REFUSED | SECTION EM |
| | DON'T KNOW | SECTION EM |

---

## HO14    ho5microwave    R5 HO14 USE OF MICROWAVE

**QUESTION TEXT:**

(Whether or not {you use/SP uses} it,) does {your/SP's} kitchen have a working microwave?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PE8 |
| | DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Go to Section EM – Environment Modifications.

---

| Derived Variables From Items in HO Section | |
|---|---|
| **ho5dbldg1** | R5 D BLDG HAS ELEVATOR |
| **ho5dbldg2** | R5 D BLDG HAS STAIR LIFT GLIDE |
| **ho5dbldg3** | R5 D BLDG HAS COMMN SPACE MEALS |
| **ho5dbldg4** | R5 D BLDG HAS SPACE SOCIAL EVENT |
| **ho5dbathprvt** | R5 D FAC HAS PRIVATE BATH |
| **ho5dkitchnpr** | R5 D FAC HAS PRIV KITCHEN |
| **ho5dkitchnco** | R5 D FAC HAS COMMON KITCHEN |

| Flag Variables Set in HO Section | |
| --- | --- |
| **fl5bathgrbbr** | R5 F HO SPS BATH HAS GRAB BARS |
| **fl5bathseat** | R5 F HO SPS BATH HAS SEAT |
| **fl5raisedtlt** | R5 F HO SP HAS RAISED TOILET |
| **fl5tltgrbbr** | R5 F HO SP TOILET HAS GRAB BARS |

---

**BOX EM1**                    **BOX EM1**                    NOT ON FILE

> If NEW RESIDENCE flag <>1 (YES), go to BOX EM2.
>
> Else if (HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES, RAMP)) or HO8b=1 (YES, ELEVATOR) or HO8c=1 (YES, STAIRLIFT) or HO11c=1 (YES, SHOWER GRABBAR) or HO11d=1 (YES, SHOWER SEAT) or HO11e=1 (YES, RAISED TOILET SEAT) or HO11f=1 (YES, TOILET GRABBAR), go to EM1.
>
> Otherwise, go to EM4.

---

**EM1**                    **em5dmodhere1**                    R5 D EM1 NEW RES ALL ITEMS HERE

**DISPLAY INSTRUCTIONS:**

If HO2<>1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display "a ramp"

If HO8b=1 (YES), display "an elevator"

If HO8c=1 (YES), display "a stair lift or stair glide"

If HO11c=1 (YES), display "a grab bar in the shower or tub area"

If HO11d=1 (YES), display "a seat for the shower or tub"

If HO11e=1 (YES), display "a raised toilet or raised toilet seat"

If HO11f=1 (YES), display "grab bars around the toilet"

If only one item listed, display "Was this item" and "it"

Otherwise, display "Were all these items" and "any of them"

**QUESTION TEXT:**

> You told me that {you have/SP has}:
>
> {a ramp}
> {an elevator}
> {a stair lift or stair glide}
> {a grab bar in the shower or tub area}
> {a seat for the shower or tub}
> {a raised toilet or raised toilet seat}
> {grab bars around the toilet}
>
> {Was this item/Were all these items} here when {you/{he/she}} moved in or did {you{he/she}} add {it/any of them}?

**CODES**

| | | |
|---|---|---|
| 1 | ALL ITEMS HERE | EM4 |
| 2 | ADDED ONE OR MORE ITEMS | |
| | REFUSED | EM4 |
| | DON'T KNOW | EM4 |

---

**BOX EM2**                    **BOX EM2**                    NOT ON FILE

---

**EM2**

| | |
|---|---|
| **em5addlstyr1** | R5 EM2A RAMP ADDED IN LAST YR |
| **em5addlstyr2** | R5 EM2B ELEVATOR ADDED IN LST YR |
| **em5addlstyr3** | R5 EM2C STR LIFT ADDED IN LST YR |
| **em5addlstyr4** | R5 EM2D SHWR GRABBAR ADD LST YR |
| **em5addlstyr5** | R5 EM2E BATHSEAT ADDED IN LST YR |
| **em5addlstyr6** | R5 EM2F TOILETSEAT ADD IN LST YR |
| **em5addlstyr7** | R5 EM2G TOILET GRABGARS ADDED YR |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at first question item, do not display question text in brackets. Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1 (YES), display "We'd like to know {if this was/ which of these were} added in the last year, that is since {CURRENT MONTH, YEAR – 1 YEAR}" and "In the last year, did {you/he she} add the".

Else if NEW RESIDENCE flag = 1 (YES), display "We'd like to know {if this was/which of these were} added to {your/SP's} current home" and " Since {you/SP} moved here, did {you/he/she}".
add the"

Display "current" in underlined text.

Else if NEW RESIDENCE flag <>1 (YES) , display "Since the last interview in {LAST INT MONTH AND YEAR}, did {you/SP}
add the"

If only one item listed at EM1, display "if this was".
Otherwise, display "which of these were".

If HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display RESPONSE [1] and variable text {a}

If HO8b=1 (YES), display RESPONSE [2] and variable text {b}

If HO8c=1 (YES), display RESPONSE [3] and variable text {c}

If HO11d=1 (YES), display RESPONSE [4] and variable text {d}

If HO11e=1 (YES), display RESPONSE [5] and variable text {e}

If HO11f=1 (YES), display RESPONSE [6] and variable text {f}

If HO11g=1 (YES), display RESPONSE [7] and variable text {g}

**QUESTION TEXT:**

{[}{We'd like to know {if this was/which of these were} added {in the last year, that is since {CURRENT MONTH, YEAR – 1 YEAR}/ to {your/SP's} current home}. {In the last year/ Since {you/SP} moved here}, did {you/he/she} add the/Since the last interview in {LAST INT MONTH AND YEAR}, did {you/SP} add the}{]}

{RESPONSE [1] a. ramp?}
{RESPONSE [2] b. elevator?}
{RESPONSE [3] c. stair lift or stair glide?}
{RESPONSE [4] d. grab bar in the shower or tub area?}
{RESPONSE [5] e. seat for the shower or tub?}
{RESPONSE [6] f. raised toilet or raised toilet seat?}
{RESPONSE [7] g. grab bars around the toilet?}

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-g sequence until all rows have been displayed.

---

| **BOX EM3** | **BOX EM3** | NOT ON FILE |
|---|---|---|

If EM2 a-g = 2 (NO), go to EM4.
Otherwise, go to EM3.

---

| **EM3** | | |
|---|---|---|
| | **em5payyufam1** | R5 EM3A SP PAID FOR RAMP |
| | **em5payyufam2** | R5 EM3B SP PAID FOR ELEVATOR |
| | **em5payyufam3** | R5 EM3C SP PAID STAIR LFT GLIDE |
| | **em5payyufam4** | R5 EM3D SP PAID SHOWER GRABBAR |
| | **em5payyufam5** | R5 EM3E SP PAID SHOWER SEAT |
| | **em5payyufam6** | R5 EM3F SP PAID RAISD TOILT SEAT |
| | **em5payyufam7** | R5 EM3G SP PAID TOILET GRABBARS |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at first question item, do not display question text in brackets.

Otherwise, display question text in brackets.

If EM2a = 1 (YES), display RESPONSE [1] and variable text {a}

If EM2b=1 (YES), display RESPONSE [2] and variable text {b}

If EM2c=1 (YES), display RESPONSE [3] and variable text {c}

If EM2d=1 (YES), display RESPONSE [4] and variable text {d}

If EM2e=1 (YES), display RESPONSE [5] and variable text {e}

If EM2f=1 (YES), display RESPONSE [6] and variable text {f}

If EM2g=1 (YES), display RESPONSE [7] and variable text {g}

**QUESTION TEXT:**

{[}Did {you/SP} or {your/{his/her}} family pay any of the cost of adding or getting the{]}

{RESPONSE [1] a. ramp?}
{RESPONSE [2] b. elevator?}
{RESPONSE [3] c. stair lift or stair glide?}
{RESPONSE [4] d. grab bar in the shower or tub area?}
{RESPONSE [5] e. seat for the shower or tub?}
{RESPONSE [6] f. raised toilet or raised toilet seat?}
{RESPONSE [7] g. grab bars around the toilet?}

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-g sequence until all rows have been displayed.

---

| **EM4** | | |
|---|---|---|
| | **em5paydevce1** | R5 EM4A SP PAID FOR VISION AIDS |
| | **em5paydevce2** | R5 EM4B SP PAID FOR HEARING AID |
| | **em5paydevce3** | R5 EM4C SP PAID FOR CANE |
| | **em5paydevce4** | R5 EM4D SP PAID FOR WALKER |
| | **em5paydevce5** | R5 EM4E SP PAID FOR WHEELCHAIR |
| | **em5paydevce6** | R5 EM4F SP PAID FOR SCOOTER |
| | **em5paydevce7** | R5 EM4G SP PAID FOR GRABBER |
| | **em5paydevce8** | R5 EM4H SP PD SPECIAL DRESS ITM |
| | **em5paydevce9** | R5 EM4I SP PAID ADAPTED UTENSILS |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at EM4a, do not display question text in brackets.

Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1 (YES), display "in the last year".

Otherwise, display "since the last interview in {LAST IN MONTH AND YEAR}".

Display "pay anything for" in bold underlined text.

**QUESTION TEXT:**

{[}Here are a few other devices that help with daily activities.  Whether or not {you use/SP uses} them now, {in the last year/since the last interview in {LAST INT MONTH AND YEAR}}, did {you/{he/she}} or {your/{his/her}} family pay anything for the following items for {you/{him/her}}?{]}

{variable text [a-i]}

RESPONSE [1] a. glasses or other vision aids such as a magnifying glass?
RESPONSE [2] b. a hearing aid?
RESPONSE [3] c. a cane?

RESPONSE[4] d. a walker?
RESPONSE[5] e. a wheelchair?
RESPONSE[6] f. a scooter?
RESPONSE[7] g. a reacher or grabber to pick up things more easily?
RESPONSE[8] h. special items to help with dressing, such as button hooks or clothes that are designed to get on and off easily?
RESPONSE[9] i. adapted utensils to help {you/SP} to eat or cut {your/{his/her}} food?

IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-i sequence until all rows have been displayed.

---

# EM5                    **em5payaltgth**              R5 EM5 PAY FOR THESE ALTOGETHER

**DISPLAY INSTRUCTIONS:**

If EM3a=1 (YES), display "ramp"
If EM3b=1 (YES), display "elevator"
If EM3c=1 (YES), display "stair lift or stair glide"
If EM3d=1 (YES), display "grab bar in the shower or tub area"
If EM3e=1 (YES), display "seat for the shower or tub"
If EM3f=1 (YES), display "raised toilet or raised toilet seat"
If EM3g=1 (YES), display "grab bars around the toilet"
If EM4a=1 (YES), display "glasses or other vision aids"
If EM4b=1 (YES), display "hearing aid"
If EM4c=1 (YES), display "cane"
If EM4d=1 (YES), display "walker"
If EM4e=1 (YES), display "wheelchair"
If EM4f=1 (YES), display "scooter"
If EM4g=1 (YES), display "reacher or grabber"
If EM4h=1 (YES), display "special items to help with dressing"
If EM4i=1 (YES), display "adapted utensils"

If more than one item displayed, display commas between each one and display "and" before the last display text.

If NEWSAMPLE flag = 1 (YES), display "in the last year".

Otherwise, display "since the last interview in {LAST INT MONTH AND YEAR}".

**QUESTION TEXT:**

Thinking about the {ramp} {elevator} {stair lift or stair glide} {grab bar in the shower or tub area} {seat for the shower or tub} {raised toilet or raised toilet seat} {grab bars around the toilet} {glasses or vision aids} {hearing aid} {cane} {walker} {wheelchair} {scooter} {reacher or grabber} {special items to help with dressing} {adapted utensils} that {you/SP} (and {your/{his/her}} family) paid for {in the last year/ since the last interview in {LAST INT MONTH AND YEAR}}, about how much was that altogether? Was it more than $500, less than $500, or just about $500?

**CODES**

| | |
|---|---|
| 1 | MORE THAN $500 |

| 3 | LESS THAN $500 | EM7 |
| | JUST ABOUT $500 | Section CM |
| | REFUSED | Section CM |
| | DON'T KNOW | Section CM |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-i sequence until all rows have been displayed.

---

**EM6**  em5morls1000  R5 EM6 MORE LESS OR ABOUT $1000

**QUESTION TEXT:**

Was it more than $1000, less than $1,000, or just about $1,000?

**CODES**

| 1 | MORE THAN $1,000 | Section CM |
| 2 | LESS THAN $1,000 | Section CM |
| 3 | JUST ABOUT $1,000 | Section CM |
| | REFUSED | Section CM |
| | DON'T KNOW | Section CM |

---

**EM7**  em5morls100  R5 EM7 MORE LESS OR ABOUT $100

**QUESTION TEXT:**

Was it more than $100, less than $1,00, or just about $1,00?

**CODES**

| 1 | LESS THAN $100 |
| 2 | JUST ABOUT $100 |
| 3 | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section CM – Community.

---

## CM1PRE           **CM1PRE**           NOT ON FILE

Now I'm going to read some statements about the community where {you live/SP lives}.

PRESS 1 AND ENTER TO CONTINUE

## CM1           **cm5knowwell**           R5 CM2 PEOPL KNOW EACH OTHR WELL

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

**QUESTION TEXT:**

People in {this/SP's} community know each other very well. Do you agree a lot, a little, or do you not agree?

**CODES**

| | |
|---|---|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

## CM2           **cm5willnghlp**           R5 CM2 PEOPL WILLG HLP EACH OTHR

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

**QUESTION TEXT:**

People in {this/SP's} community are willing to help each other. [Do you agree a lot, a little, or do you not agree?]

**CODES**

| | |
|---|---|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

## CM4           **cm5peoptrstd**           R5 CM4 PEOPLE CAN BE TRUSTED

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

**QUESTION TEXT:**

People in {this/SP's} community can be trusted.  [Do you agree a lot, a little, or do you not agree?]

**CODES**

| | |
|---|---|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

GO TO SECTION TE – TECHNOLOGICAL ENVIRONMENT

| Section | TE | [TECHNOLOGICAL ENVIRONMENT] | Sequence: 12 |
|---|---|---|---|

---

**TE1PRE**  TE1PRE  NOT ON FILE

**QUESTION TEXT:**

Now I have a few questions about the phones and computers {you/SP} may have in {your/his/her} {home/apartment/room/unit/suite/other}.

PRESS 1 AND ENTER TO CONTINUE

---

**TE1**  te5cellphone  R5 TE1 WORKING CELL PHONE

**QUESTION TEXT:**

{Do you/Does SP} have a working cell phone?

IF NEEDED:  A cell phone is a phone that you can use anywhere you go.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**TE3**  te5othrphone  R5 TE3 ONE PHONE OTHER THAN CELL

**QUESTION TEXT:**

Is there at least one working telephone in {your/SP's} {home/apartment/room/unit/suite/other} that is not a cell phone?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**TE6**  te5computer  R5 TE6 HAS A WORKING COMPUTER

**QUESTION TEXT:**

{Do you/Does SP} have a working computer in {your/his/her} {home/apartment/room/unit/suite/other}?

IF NEEDED: Please include desktops and laptop computers only, not cell phones that go on the Internet or online.

**CODES**

| | | |
|---|---|---|
| 1 | YES | TE8A |
| 2 | NO | |
| 7 | YES, DOESN'T KNOW HOW TO USE A COMPUTER | TE8A |
| | REFUSED | |
| | DON'T KNOW | |

---

**TE8**  te5compoth  R5 TE8 USED COMPUTER ANYWHRE ELS

**DISPLAY INSTRUCTIONS:**

If STRUCTURE flag = 2 (multi-unit), display "in {your/his/her} building,".

---

**QUESTION TEXT:**

> In the last month, {have you/has SP} used a computer anywhere else?
>
> IF NEEDED: Other places include {in {your/his/her} building,} at a library, or at a friend or family member's home.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## TE8A          te5tablet          R5 TE8A SP HAS A TABLET COMPUTER

**QUESTION TEXT:**

> {Do you/Does SP} have a tablet computer like the iPad that works by touching the screen?
>
> IF NEEDED: By tablet computer we mean devices like the iPad, Kindle Fire, Galaxy, or Xoom that let you go online and that work by touching the screen. Do not include eBook readers like the Nook or Kindle.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| 7 | YES, DOESN'T KNOW HOW TO USE |
| | REFUSED |
| | DON'T KNOW |

---

## BOX TE9          BOX TE9          NOT ON FILE

**QUESTION TEXT:**

> If TE1 = 2 (NO CELL PHONE) and TE6 = 2 (NO COMPUTER) and TE8 = 2 (NO COMPUTER USE ELSEWHERE) and [TE8A=2 (NO TABLET COMPUTER) or TEA=7 (YES, DOESN'T KNOW HOW TO USE)], go to Section MD – Mobility Devices.
> If TE1 = 2 (NO CELL PHONE) and TE6 = 7 (DOESN'T KNOW HOW TO USE COMPUTER) and [TE8A=2 (NO TABLET COMPUTER) or TEA=7 (YES, DOESN'T KNOW HOW TO USE)] [TE8A=2 (NO TABLET COMPUTER) or TEA=7 (YES, DOESN'T KNOW HOW TO USE)]] go to Section MD – Mobility Devices.
> Otherwise, go to TE9.

---

## TE9          te5emailtext          R5 TE9 EMAIL OR TEXTING

**QUESTION TEXT:**

> In the last month, {have you/has SP} ever sent messages by email or texting?
>
> IF NEEDED: Texting is like email but usually done on a phone.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | TE11 |
| | REFUSED | TE11 |
| | DON'T KNOW | TE11 |

---

## TE10          te5oftnemail          R5 TE10 EMAIL OR TEXTING OFTEN

**QUESTION TEXT:**

In the last month, how often did {you/SP} send messages by email or texting? Would you say most days, some days or rarely?

**CODES**

| | |
|---|---|
| 1 | MOST DAYS |
| 2 | SOME DAYS |
| 3 | RARELY |
| | REFUSED |
| | DON'T KNOW |

---

## TE11       te5online       R5 TE11 ONLINE COMPUTER USE

**DISPLAY INSTRUCTIONS:**

If TE9 = 1 (YES), display "Besides email or texting," and "other".

**QUESTION TEXT:**

In the last month, {besides email or texting, }{have you/has SP} ever gone on the Internet or online for any {other} reason?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION MD |
| | REFUSED | SECTION MD |
| | DON'T KNOW | SECTION MD |

---

## TE12       te5shoponli1       R5 TE12A INTERNET SHOP GROCERY

                   te5shoponli2       R5 TE12B INTERNET BANKING

                   te5shoponli3       R5 TE12C INTERNET ORDR REFLL RX

                   te5socialnet       R5 TE12D SOCIAL NETWORK SITES

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at TE12a, do not display question text in brackets.
Otherwise, display question text in brackets

**QUESTION TEXT:**

{[]In the last month, {have you/has SP} gone on the Internet or online to{]}

{variable text [a-D]}

RESPONSE [1] a. shop for groceries or personal items?
IF NEEDED: By personal items, we mean things like toiletries that you can buy at the grocery or drug store?

RESPONSE [2] b. pay bills or do banking?
RESPONSE [3] c. order or refill prescriptions?
RESPONSE [4] d. visit social network sites?
IF NEEDED: These include sites where you can keep in touch with friends, like Facebook or Linkedin.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Array the responses and variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed

---

**TE13**           **te5intrntmd1**           R5 TE13A INTERNET MEDICAL PROVDR

                         **te5intrntmd2**           R5 TE13B INTERNET INSURANCE INFO

                         **te5intrntmd3**           R5 TE13C INTERNET HEALTH CONDS

**DISPLAY INSTRUCTIONS:**
Use "Same Question Stem" display
Display "year" in underlined text.

If at TE13a, do not display question text in brackets.  Otherwise, display question text in brackets

**QUESTION TEXT:**

{[} In the last year, {have you/has SP} gone on the Internet or online to {]}

{variable text [a-c]}

RESPONSE [1] a. contact any of {your/his/her} medical providers?
IF NEEDED:  This includes making or changing medical appointments, getting test results, requesting referrals or prescriptions, or to get advice.

RESPONSE [2] b. handle Medicare or other health insurance matters?
IF NEEDED:  This includes going to Medicare's website or another insurer's website to find out what is covered, compare plans or providers, find out about bills, or file a claim.

RESPONSE [3] c. get information about {your/his/her} health conditions?

**CODES**
1           YES
2           NO
             REFUSED
             DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Array the responses and variable text columns in the panel.
Display 'variable text' in the a-c sequence until all rows have been displayed

GO TO SECTION MD – Mobility Devices

---

## BOX MD1PRE          BOX MD1PRE                NOT ON FILE

If DECEASED flag = 1 (YES) and NOTMOBILE flag = 1 (YES), go to Section SC - Self Care Activities.
Otherwise, go to MD1PRE.

## MD1PRE          MD1PRE                NOT ON FILE

**DISPLAY INSTRUCTIONS:**
If DECEASED flag= 1 (YES), display "SP may have used".
Otherwise, display "you use/SP uses".

**QUESTION TEXT:**
The next questions are about items that {you use/SP uses} {SP may have used} to help {you/him/her} get around more easily, safely, or on {your/his/her} own.

PRESS 1 AND ENTER TO CONTINUE

## MD1          md5canewlker          R5 MD1 USED CANE WALKER WHLCHAIR

**DISPLAY INSTRUCTIONS:**
If DECEASED flag = 1 (YES), display "of {his/her} life, did {SP} use". Otherwise, display ",have you/has {SP} used".

**QUESTION TEXT:**
In the last month {of {his/her} life, did {SP} use/,{have you/has {SP} used} a cane, walker, wheelchair, or scooter, yes or no?

PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## BOX MD2          BOX MD2                NOT ON FILE

If DECEASED flag = 1 (YES), and MD1 = 2 (NO), DK, or RF, go to Section CP - Cognition (Proxy).
Else if MD1 = 2 (NO), DK, or RF, go to Section SS - Sensory Impairments and Symptoms.
Otherwise, go to MD2.

## MD2          md5cane          R5 MD2 USED A CANE

**DISPLAY INSTRUCTIONS:**
If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**
In the last month {of {his/her} life}, which did {you/SP} use?

a cane?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If 1 is selected, set CANE flag = 1 (yes).

---

## MD3      md5walker      R5 MD3 USED A WALKER

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

In the last month {of {his/her} life}, which did {you/SP} use?

a walker?

IF NEEDED: This includes standard walkers without wheels, rolling and wheeled walkers, and rollators.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If 1 is selected, set WALKER flag = 1 (yes).

---

## MD4      md5wheelchar      R5 MD4 USED A WHEELCHAIR

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

In the last month {of {his/her} life}, which did {you/SP} use?

a walker?

IF NEEDED: This includes standard walkers without wheels, rolling and wheeled walkers, and rollators.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If 1 is selected, set WHEELCHAIR flag = 1 (yes).

---

## BOX MD4A      BOX MD4A      NOT ON FILE

If DECEASED flag = 1 (YES), go to MD5.
Else if MD4 = 1 (YES), go to MD4a.

Otherwise, go to MD5.

## MD4A    **md5whelcrspc**    R5 MD4A WHEELCHAIR IN LIVNG SPACE

**DISPLAY INSTRUCTIONS:**

 Display image of wheelchair.

**QUESTION TEXT:**

 {Do you/does SP} have that wheelchair with {you/him/her} where {you live/SP lives}?

 IF NEEDED: This includes manual, power, electric, or motorized wheelchairs.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

 If 1 is selected, set WHEELCHAIR HOME flag = 1 (yes).

## MD5    **md5scooter**    R5 MD5 USE A SCOOTER

**DISPLAY INSTRUCTIONS:**

 Display image of scooter.

 If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

 SHOW CARD MD2

 [In the last month {of {his/her} life}, did {you/SP} use]

 a scooter?

 IF NEEDED: This includes electric or power scooters that are used for travel.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

 If 1 is selected, set SCOOTER flag = 1 (yes)

 If MD1 = 1 (used device in last month) and MD2 = 2 (didn't use cane) and MD3 = 2 (didn't use walker) and MD4 = 2 (didn't use wheelchair) and MD5 = 2 (didn't use scooter), display error message #7.

## BOX MD5A    **BOX MD5A**    NOT ON FILE

 If DECEASED flag = 1 (YES), go to Section CP - Cognition (Proxy).
 Else if MD5 = 1, go to MD5a.
 Otherwise, go to Section SS - Sensory Impairments and Symptoms.

## MD5A      md5scterinsp      R5 MD5A SCOOTER IN LIVING SPACE

**DISPLAY INSTRUCTIONS:**
> Display image of scooter.

**QUESTION TEXT:**
> {Do you/Does SP} have that (power) scooter with {you/him/her} where {you live/he lives/she lives}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | Section SS |
| 2 | NO | Section SS |
| | REFUSED | Section SS |
| | DON'T KNOW | Section SS |

**PROGRAMMER INSTRUCTIONS:**
> If 1 is selected, set SCOOTERHOME flag = 1 (yes)

---

| Flag Variables Set in MD Section | |
|---|---|
| **fl5cane** | R5 F MD SP USES CANE |
| **fl5walker** | R5 F MD SP USES WALKER |
| **fl5wheelchr** | R5 F MD SP USES WHEELCHAIR |
| **fl5whlchrhom** | R5 F MD SP HAS WHEELCHR AT HOME |
| **fl5scooter** | R5 F MD SP USES SCOOTER |
| **fl5scooterho** | R5 F MD SP USES SCOOTER AT HOME |

---

## SS3PRE      SS3PRE      NOT ON FILE

**QUESTION TEXT:**

> Now let's talk about how well {you hear/SP hears}.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## SS3      ss5heringaid      R5 SS3 HEARING AID USED

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "In the last month" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> In the last month, {have you/has {he/she}} used a hearing aid or other hearing device?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| 7 | DEAF | SS7PRE |
| | REFUSED | |
| | DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

IF SS3 = 7 (DEAF), set DEAF flag = 1 (YES)

---

## SS4A      ss5hearphone      R5 SS4A SP CAN USE TELEPHONE

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}..."

ELSE DISPLAY "{Do you/Does SP}..."

**QUESTION TEXT:**

> {When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to use the telephone?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS4B      ss5convwradi      R5 SS4B CONVERSATIN WITH TV RADIO

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}..."

ELSE DISPLAY "{Do you/Does SP}..."

**QUESTION TEXT:**

> {When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to carry on a conversation in a room with a radio or TV playing?

**CODES**

| | | |
|---|---|---|
| 1 | YES | SS7PRE |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## SS4C        ss5convquiet        R5 SS4C CONVERS IN QUIET ROOM

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}…"

ELSE DISPLAY "{Do you/Does SP}…"

**QUESTION TEXT:**

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to carry on a conversation in a quiet room?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS7PRE        SS7PRE        NOT ON FILE

Now I have a few questions about how well {you/SP} can see.

PRESS 1 AND ENTER TO CONTINUE

---

## SS7        ss5glasseswr        R5 SS7 WEARS GLASSES CONTCTS

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "at a distance" IN BOLD UNDERLINE TEXT

**QUESTION TEXT:**

{Do you/Does SP} wear glasses or contacts to help {you/him/her} see things at a distance?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| 7 | BLIND | SS13PRE |
| | REFUSED | |
| | DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

If SS7 = 7 (BLIND), set BLIND flag = 1 (YES).

---

## SS8A        ss5seewellst        R5 SS8B SEES ACROSS THE STREET

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

IF SS7=1 (GLASSES/CONTACTS FOR DISTANCE) THEN DISPLAY "When {you use/SP uses} glasses or contacts, {do you/does {he/she}}…"

ELSE DISPLAY "{Do you/Does SP}…"

**QUESTION TEXT:**

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to recognize someone across the street?

**CODES**

| | | |
|---|---|---|
| 1 | YES | Ss10 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## SS8B       ss5seetvgls       R5 SS8B TV ACROSS ROOM W GLASSES

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

IF SS7=1 (GLASSES/CONTACTS FOR DISTANCE) THEN DISPLAY "When {you use/SP uses} glasses or contacts, {do you/does {he/she}}…"

ELSE DISPLAY "{Do you/Does SP}…"

**QUESTION TEXT:**

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to watch television across the room?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS10       ss5glasscls       R5 SS10 WEAR GLS CONTCS SEE CLOS

**DISPLAY INSTRUCTIONS:**
DISPLAY QUESTION TEXT "close up" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

{Do you/Does SP} wear glasses or contacts to help {you/him/her) see things **close up**?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS11       ss5othvisaid       R5 SS11 USED OTHER VISION AIDS

**QUESTION TEXT:**

In the last month, did {you/SP} use other vision aids such as a magnifying glass to help {you/him/her} see things close up?

IF NEEDED: Vision aids include things like a magnifying glass, large-print books, and other tools to help people with vision impairments.

**CODES**

| 1 | YES |
|---|-----|
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## SS12        ss5glrednewp        R5 SS12 CAN READ NEWSPAPER PRINT

**DISPLAY INSTRUCTIONS:**

IF SS10 =1 (GLASSES OR CONTACTS FOR CLOSE UP) ) AND SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} glasses or contacts and vision aids", and "do you/does {he/she}"

ELSE IF SS10=1 (GLASSES OR CONTACTS FOR CLOSE UP) AND SS11 <> 1 DISPLAY "When {you use/SP uses} glasses or contacts", and "do you/does {he/she}"

ELSE IF SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} vision aids", and "do you/does {he/she}"

ELSE DISPLAY "{Do you/Does SP}"

**QUESTION TEXT:**

{When {you use/SP uses} glasses or contacts/When {you use/SP uses} vision aids/When {you use/SP uses} glasses or contacts and vision aids}, {{do you/does {he/she}} /{Do you/Does SP}} see well enough to read newspaper print?

**CODES**

| 1 | YES |
|---|-----|
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## SS13PRE        SS13PRE        NOT ON FILE

**QUESTIONS TEXT:**

Now I have some questions about health related problems that {you/SP} may have had in the last month.

PRESS 1 AND ENTER TO CONTINUE

---

## SS13        ss5probchswl        R5 SS13 PROBLEMS CHEW OR SWALLOW

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, did {you/SP} have problems with chewing or swallowing that caused difficulty when {you/he/she} ate?

**CODES**

| 1 | YES |
|---|-----|
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## SS14        ss5probspeak        R5 SS14 PROBLEMS SPEAKING

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month because of {your/SP's} health, did {you/he/she} have any problems in speaking or in making {yourself/herself/himself} understood when {you talk/he talks/she talks)?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS15      ss5painbothr      R5 SS15 BOTHERED BY PAIN

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, {have you/has {he/she}} been bothered by pain?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SS18A |
| | REFUSED | SS19 |
| | DON'T KNOW | SS19 |

---

## SS17      ss5painlimts      R5 SS17 PAIN EVER LIMTS ACTIVIT

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, has pain ever limited {your/SP's} activities?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS18A      ss5painmedof      R5 SS18A LST MNTH OFTEN PAIN MED

**QUESTION TEXT:**

SHOWCARD SS1

In the last month, how often did {you/SP} take medication for pain? Would you say every day, most days, some days, rarely or never?

IF NEEDED: Include medications {you/{he/she}} took to treat or prevent pain.

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAY S(5-6 DAYS A WEEK) |
| 3 | SOME DAY S(2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

## BOX SS18B

NOT ON FILE

If SS15=1 (PAIN) or SS18A=1 (PAIN MEDS EVERY DAY), 2 (PAIN MEDS MOST DAYS), 3 (PAIN MEDS SOME DAYS), or 4 (PAIN MEDS RARELY), go to SS18B

Otherwise, go to SS19

## SS18B

| | |
|---|---|
| ss5painwhe1 | R5 SS18B BACK PAIN IN LAST MNTH |
| ss5painwhe2 | R5 SS18B HIP PAIN IN LAST MONTH |
| ss5painwhe3 | R5 SS18B KNEE PAIN INLAST MNTH |
| ss5painwhe4 | R5 SS18B FOOT PAIN IN LAST MNTH |
| ss5painwhe5 | R5 SS18B HAND PAIN IN LAST MNTH |
| ss5painwhe6 | R5 SS18B WRIST PAIN IN LAST MNTH |
| ss5painwhe7 | R5 SS18B SHOULDR PAIN LAST MNTH |
| ss5painwhe8 | R5 SS18B HEAD PAIN IN LAST MNTH |
| ss5painwhe9 | R5 SS18B NECK PAIN IN LAST MNTH |
| ss5painwhe10 | R5 SS18B ARM PAIN IN LAST MNTH |
| ss5painwhe11 | R5 SS18B LEG PAIN IN LAST MNTH |
| ss5painwhe12 | R5 SS18B STOMACH PAIN LAST MNTH |
| ss5painwhe13 | R5 SS18B OTHR SPCFY PAIN LST MO |

QUESTION TEXT:

SHOW CARD SS2

Please look at this card and tell me where {you have/SP has} had pain in the last month.

IF NEEDED: Include places for which {you/{he/she}} took medications to treat or prevent pain.

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | BACK | SS19 |
| 2 | HIPS | SS19 |
| 3 | KNEES | SS19 |
| 4 | FEET | SS19 |
| 5 | HANDS | SS19 |
| 6 | WRISTS | SS19 |
| 7 | SHOULDERS | SS19 |
| 8 | HEAD | SS19 |
| 9 | NECK | SS19 |
| 10 | ARMS | SS19 |
| 11 | LEGS | SS19 |
| 12 | STOMACH | SS19 |
| 91 | OTHER PLACES (SPECIFY) | |

## SS18C

SS18C  NOT ON FILE

QUESTION TEXT:

SPECITY OTHER PLACES SP HAD PAIN

ENTER TEXT

| | Length | 50 |
|---|---|---|

---

## SS19        ss5probbreat        R5 SS19 BREATHING PROBLEMS

**QUESTION TEXT:**

In the last month, did {you/SP} have any breathing problems, including shortness of breath or difficulty breathing?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SS21 |
| | REFUSED | SS21 |
| | DON'T KNOW | SS21 |

---

## SS20        ss5probrlimt        R5 SS20 BREATH PROBLS LIMT ACTIV

**QUESTION TEXT:**

In the last month, did {your/SP's} breathing problems ever limit {your/his/her} activities?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS21        ss5strnglmup        R5 SS21 UPPER BOD STRENGTH LIMIT

**QUESTION TEXT:**

In the last month, did {you/SP} have limited strength or movement in {your/his/her} shoulders, arms, or hands?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SS23 |
| | REFUSED | SS23 |
| | DON'T KNOW | SS23 |

---

## SS22        ss5uplimtact        R5 SS22 UP BOD STRNGTH LIMT ACT

**QUESTION TEXT:**

In the last month, did this problem with {your/SP's} shoulders, arms, or hands ever limit {your/his/her} activities?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SS23        ss5lwrbodstr        R5 SS23 LOWER BODY STRNGTH LIMIT

**QUESTION TEXT:**

In the last month, did {you/SP} have limited strength or movement in {your/his/her} hips, legs, knees, or feet?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SS25 |
| | REFUSED | SS25 |
| | DON'T KNOW | SS25 |

---

## SS24            ss5lwrbodimp          R5 SS24 LWER BOD STRNGTH IMT ACT

**QUESTION TEXT:**

In the last month, did this problem with {your/SP's} hips, legs, knees, or feet ever limit {your/his/her} activities?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## SS25            ss5lowenergy          R5 SS26 LOW ENERGY IN LAST MONTH

**QUESTION TEXT:**

In the last month, did {you/SP} have low energy or {were you/was SP} easily exhausted?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SS27 |
| | REFUSED | SS27 |
| | DON'T KNOW | SS27 |

---

## SS26            ss5loenlmtat          R5 SS26 LOW ENERGY EVER LIM ACT

**QUESTION TEXT:**

In the last month, did {your/SP's} low energy or exhaustion ever limit {your/his/her} activities?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## SS27            ss5prbbalcrd          R5 SS27 BALANCE OR COORD PROBS

**QUESTION TEXT:**

In the last month, did {you/SP} have problems with balance or coordination?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION PC |
| | REFUSED | SECTION PC |
| | DON'T KNOW | SECTION PC |

---

## SS28            ss5prbbalcnt          R5 SS28 BAL COORD PROB LIMIT ACT

**QUESTION TEXT:**

In the last month, did {your/SP's} balance or coordination problems ever limit {your/SP's} activities?

**CODES**
1        YES
2        NO
         REFUSED
         DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Go to Section PC – Physical Capacity

---

| Flag Variables Set in SS Section | |
|---|---|
| **fl5deaf** | R5 F SS DEAF PRIOR OR CURRENT ROUND |
| **fl5blind** | R5 F SS BLIND PRIOR OR CURRENT ROUND |

## PC1PRE                    PC1PRE                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

> IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}…".  DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.
>
> IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
> ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
> ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

**QUESTION TEXT:**

> We are interested in whether {you have /SP has} difficulty with physical movements when {you do/he does/she does} them without help from another person {and without {your/his/her} {cane/walker/cane or walker}}.
>
> PRESS 1 AND ENTER TO CONTINUE

## PC1                    pc5walk6blks                    R5 PC1 ABLE TO WALK 6 BLOCKS

**DISPLAY INSTRUCTIONS:**

> IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}…".
>
> DISPLAY TEXT "able" and "6 blocks" and "without" AS BOLD UNDERLINED TEXT
>
> IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
> ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
> ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

**QUESTION TEXT:**

> In the last month, {were you/was SP} able to… walk 6 blocks, or about half a mile, by {yourself/himself/herself} {and without {your/his/her} {cane/walker/cane or walker}}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | PC3 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

## PC2                    pc5walk3blks                    R5 PC2 ABLE TO WALK 3 BLOCKS

**DISPLAY INSTRUCTIONS:**

> IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}… ".
>
> DISPLAY TEXT "able" and "3 blocks" and "without" AS BOLD UNDERLINED TEXT.
>
> IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
> ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
> ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] walk 3 blocks by {yourself/himself/herself}{and without {your/his/her}{cane/walker/cane or walker}}?

**CODES**

1    YES
2    NO
     REFUSED
     DON'T KNOW

---

## PC3     pc5up20stair    R5 PC3 ABLE TO WALK UP 20 STAIRS

**DISPLAY INSTRUCTIONS:**

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane".

DISPLAY TEXT "able" and "20 stairs" and "without" AS BOLD UNDERLINED TEXT.

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] walk up 20 stairs (about two flights) by {yourself/himself/herself} {and without {your/his/her} cane}?

**CODES**

1    YES             PC5
2    NO
     REFUSED
     DON'T KNOW

---

## PC4     pc5up10stair    R5 PC4 ABLE TO WALK UP 10 STAIRS

**DISPLAY INSTRUCTIONS:**

DISPLAY QUESTION TEXT "able" and "10 stairs" AND "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane".

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] walk up 10 stairs by {yourself/himself/herself}{and without {your/his/her} cane}?

**CODES**

1    YES
2    NO
     REFUSED
     DON'T KNOW

---

## PC5     pc5car20pnds    R5 PC5 ABLE TO CARRY 20 POUNDS

**DISPLAY INSTRUCTIONS:**

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}…". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".

ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

DISPLAY TEXT "able" and "20 pounds" AS BOLD UNDERLINED TEXT.

**QUESTION TEXT:**

[In the last month, {were you/was SP} **able** to… ] lift and carry **20 pounds**, or two full bags of groceries, by {yourself/himself/herself} {and without {your/his/her} {cane/walker/cane or walker}}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | PC7 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## PC6        pc5car10pnob        R5 PC6 CARRY A 10 POUND OBJECT

**DISPLAY INSTRUCTIONS:**

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}…". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

DISPLAY TEXT "able" and "10 pound" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

**QUESTION TEXT:**

[In the last month, {were you/was SP} **able** to… ] lift and carry a **10-pound** object by {yourself/himself/herself} {and without {your/his/her} {cane/walker/cane or walker}}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## PC7        pc5geonknees        R5 PC7 ABLE TO GET DOWN ON KNEES

**DISPLAY INSTRUCTIONS:**

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT.

**QUESTION TEXT:**

[In the last month, {were you/was SP} **able** to… ] get down on {your/his/her} knees and get back up without holding on to anyone or anything?

**CODES**

| | | |
|---|---|---|
| 1 | YES | PC9 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## PC8        pc5bendover        R5 PC8 ABLE TO BEND OVER

**QUESTION TEXT:**

[In the last month {were you/was SP} able to… ] bend over without holding on to anyone or anything?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PC9    pc5hvobovrhd    R5 PC9 HEAVY OBJECT ABOVE HEAD

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] put a heavy book or other object on a shelf above {your/his/her} head?

**CODES**

| | | |
|---|---|---|
| 1 | YES | PC11 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## PC10    pc5rechovrhd    R5 PC10 ABLE TO REACH OVERHEAD

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] reach up over {your/his/her} head without holding on to anyone or anything?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PC11    pc5opnjarwhd    R5 PC11 OPEN SEALED JAR W HANDS

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to… ] open a sealed jar using just {your/his/her} hands?

**CODES**

| | | |
|---|---|---|
| 1 | YES | SECTION CP |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

## PC12        pc5grspsmobj        R5 PC12 ABLE GRASP SMALL OBJECTS

**DISPLAY INSTRUCTIONS:**

DISPLAY "able" IN BOLD UNDERLINED TEXT.

**QUESTION TEXT:**

[In the last month, {were you/was SP} able to … ] use {your/his/her} fingers to grasp or handle small objects?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section CP – Cognition (Proxy)

---

## BOX CP1PRE    BOX CP1PRE    NOT ON FILE

> If DECEASED flag = 1 (YES) and NOTALERT flag = 1 (YES), go to Section CL - Closing.
> Else if DECEASED flag = 1 (YES), go to CP1.
> Else if PROXY flag = 1 (YES), go to CP1PRE.
> Otherwise, go to Section CG Cognition (SP).

## CP1PRE    CP1PRE    NOT ON FILE

**QUESTION TEXT:**

> Part of this study is concerned with people's memory and ability to think about things.
>
> PRESS 1 AND ENTER TO CONTINUE

## CP1    cp5memrygood    R5 CP1 HOW GOOD MEMRY AT PRESENT

**DISPLAY INSTRUCTIONS:**

> If DECEASED flag = 1 (YES), display "Next, how would you rate {SP}'s memory in the month before {he/she} died" and "was".
> Otherwise, display "First, how would you rate {SP}'s memory at the present time".
> DISPLAY "at the present time" IN BOLD UNDERLINED TEXT.

**QUESTION TEXT:**

> {First, how would you rate {SP}'s memory at the present time/Next, how would you rate {SP}'s memory in the month before {he/she} died}? Would you say it {is/was} excellent, very good, good, fair, or poor?

**CODES**

| | |
|---|---|
| 1 | EXCELLENT |
| 2 | VERY GOOD |
| 3 | GOOD |
| 4 | FAIR |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

## BOX CP2    BOX CP2    NOT ON FILE

> If DECEASED flag = 1 (YES), go to Section MO - Mobility.
> Else if the PERSON ROSTER MEMBER flagged as the CURRENT INT PROXY was flagged as the LAST INT PROXY, go to CP3PRE.
>
> Else if IS9 = 30-37, or 92 (proxy is not a relative), go to CP2.
> Otherwise, go to CP3PRE.

## CP2    cp5knownspyr    R5 CP2 KNOWN SP 4 AT LEAST A YR

**DISPLAY INSTRUCTIONS:**

> Spell out month in question text (for example, display "March" rather than "3")

**QUESTION TEXT:**

> Have you known {SP} for at least 1 year, that is since {CURRENT MONTH, YEAR – 1 year}?

**CODES**

| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## CP3PRE

**CP3PRE**  NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If CP2 = 1 (KNOWN AT LEAST 1 YEAR) or IS9 = 2-29, 91 (PROXY IS RELATIVE), display "in the last several years". Otherwise, display "since you have known {him/her}".

**QUESTION TEXT:**

Now, I'd like to ask some questions about whether you have noticed any changes in {SP} {in the last several years/since you have known {him/her}} due to thinking or memory problems.

PRESS 1 AND ENTER TO CONTINUE

---

## BOX CP3

**BOX CP3**  NOT ON FILE

If any of LAST INT CP3{a-h} = 3 (DEMENTIA, ALZHEIMERS REPORTED BY PROXY), go to CP4.

Otherwise, go to CP3.

---

## CP3

| | |
|---|---|
| **cp5chgthink1** | R5 CP3A SP DIFF REMEMBER DATE |
| **cp5chgthink2** | R5 CP3B SP REPEATS SELF |
| **cp5chgthink3** | R5 CP3C SP DIFF REMBER APPT |
| **cp5chgthink4** | R5 CP3D SP CHNG INTRST ACT HOB |
| **cp5chgthink5** | R5 CP3E SP DIFF WITH MONEY MGMT |
| **cp5chgthink6** | R5 CP3F SP DIFF LEARNG USE TOOL |
| **cp5chgthink7** | R5 CP3G SP PRBLMS WITH JDGMT |
| **cp5chgthink8** | R5 CP3H SP DLY PRBLMS W THNK MEM |
| **cp5dad8dem** | R5 D DEMENTIA REPORTED IN PRIOR AD8 |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

If CP2 = 1 (KNOWN AT LEAST 1 YEAR) or IS9 = 2-29, 91 (PROXY IS RELATIVE), display "in the last several years". Otherwise, display "since you have known {him/her}".

Display the current response item text as a fill in the "IF NEEDED" statement.
If at CP3a-g, display "caused by a thinking or memory problem in {variable text [a-g]}"
Else if at CP3h display "in {variable text [h]}"

If at CP3a, do not display question text in brackets.
Otherwise, display question text in brackets.
If at CP3a, display "first"
If at CP3b-CP3g, display "next"
If at CP3h, display "last"

**QUESTION TEXT:**

{[}I'll read some statements about {him/her}. If there has been a change { in the last several years/since you have known {him/her}} caused by {his/her} thinking or memory problems, please say "Yes."

Otherwise say "No."{]}

The {first/next/last} item is....

{variable text [a-h]}

IF NEEDED: Has there been a change caused by a thinking or memory problem in {variable text [a-g]]]}{variable text[h]}}?

RESPONSE[1] a. remembering the month or year
RESPONSE[2] b. repeating questions, stories, or statements
RESPONSE[3] c. amount of difficulty remembering appointments
RESPONSE[4] d. amount of interest in hobbies or activities
RESPONSE[5] e. amount of difficulty handling money matters like balancing a checkbook or paying bills
RESPONSE[6] f. amount of trouble learning how to use a tool, appliance or gadget, for example a TV remote control or microwave
RESPONSE[7] g. problems with judgment, for example falling for scams or buying inappropriate gifts
RESPONSE[8] h. daily problems with thinking or memory

**CODES**

| | |
|---|---|
| 1 | YES, A CHANGE |
| 2 | NO, NO CHANGE |
| 3 | DEMEMTIA/ALZHEIMER'S REPORTED BY PROXY |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display 'variable text' in the a-h sequence until all rows have been displayed

---

| **CP4** | **cp5memcogpr1** | R5 CP4A LOST IN FAMILIAR ENVIRON |
|---|---|---|
| | **cp5memcogpr2** | R5 CP4B SP WANDERED OFF NO RETRN |
| | **cp5memcogpr3** | R5 CP4C SP ABLE LEFT ALONE 1 HR |
| | **cp5memcogpr4** | R5 CP4D SP HEARS SEES THNGS |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at CP4a, do not display question text in brackets
Otherwise display question text in brackets

**QUESTION TEXT:**

{[} I have a few other questions. In the last year... {]}

{variable text [a-d]}

RESPONSE[1] a. did {he/she} ever get lost in a familiar environment?
RESPONSE[2] b. did {he/she} ever wander off and not return by {himself/herself}?
RESPONSE[3] c. was {he/she} able to be left alone for an hour or so?
RESPONSE[4] d. did{he/she} hear or see things that were not really there?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel
Display "variable text" in the a-d sequence until all rows have been displayed

GO TO SECTION CG - COGNITION (SP)

| Derived Variables From Items in CP Section |
| --- |
| **cp5dad8dem**   R5 D DEMENTIA REPORTED IN PRIOR AD8 |

---

**BOX CG1PRE**     BOX CG1PRE     NOT ON FILE

If PROXY flag = 1 (yes), go to CG1APRE.

Otherwise go to CG2PRE.

---

**CG1APRE**     CG1APRE     NOT ON FILE

**QUESTION TEXT:**

There are a few questions that I would like to ask {SP} so that the study can better understand memory in people {his/her} age.  Some may be hard to answer, but it is important to the study that we ask these.

PRESS 1 AND ENTER TO CONTINUE

---

**CG1A**     cg5speaktosp     R5 CG1A SPEAK TO SP ASK QUES

**QUESTION TEXT:**

May I speak to {SP} and ask {him/her} a few questions?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | CG1D |

---

**CG1B**     CG1B     NOT ON FILE

**QUESTION TEXT:**

IF SP IS NOT IN THE ROOM, ASK PROXY TO HAVE SP JOIN YOU

IF/WHEN SP IS IN THE ROOM, PRESS 1 AND ENTER TO CONTINUE

---

**CG1C**     cg5quesremem     R5 CG1C START W QUES ABOUT MEMRY

**QUESTION TEXT:**

I will start with a question about memory.  Does that sound OK?

**CODES**

| | | |
|---|---|---|
| 1 | YES | CG6PRE |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

**CG1D**     cg5reascan01     R5 CG1D SP CANT ANS DEMENTIA

cg5reascan02     R5 CG1D SP CANT ANS UNABLE SPEAK

cg5reascan03     R5 CG1D SP CANT ANS UNABLE HEAR

cg5reascan04     R5 CG1D SP CANT ANS SP REFUSED

| cg5reascan05 | R5 CG1D CANT ANS PROXY REFUSED |
|---|---|
| cg5reascan06 | R5 CG1D SP CANT ANS NOT PRESENT |
| cg5reascan07 | R5 CG1D SP CANT ANS SP TOO ILL |
| cg5reascan08 | R5 CG1D SP CANT ANS LANG BARRIER |
| cg5reascan09 | R5 CG1D SP CANT ANS OTHR SPECIFY |

**QUESTION TEXT:**

What is the main reason you feel (you/he/she) cannot answer questions about memory?

SELECT ALL THAT APPLY

**CODES**     **Code All That Apply**

| 1 | SP HAS DEMENTIA/ALZHEIMER'S/ NOT ABLE | GO TO MO |
|---|---|---|
| 2 | SP IS UNABLE TO SPEAK | GO TO MO |
| 3 | SP IS UNABLE TO HEAR | GO TO MO |
| 4 | SP REFUSED | GO TO MO |
| 5 | PROXY REFUSED | GO TO MO |
| 6 | SP NOT PRESENT | GO TO MO |
| 7 | SP TOO ILL | GO TO MO |
| 8 | SP LANGUAGE BARRIER | GO TO MO |
| 91 | OTHER (SPECIFY) | |

---

# CG1E                     CG1E                          NOT ON FILE

**QUESTION TEXT:**

SPECIFY THE OTHER REASON SP CANNOT ANSWER QUESTIONS ABOUT MEMORY

**ENTER TEXT**

Length                                              255

**PROGRAMMER INSTRUCTIONS:**

Go to Section MO Mobility.

---

# CG2PRE                   CG2PRE                        NOT ON FILE

**QUESTION TEXT:**

The next few questions are about people's memory and ability to think about things. It is important for the study to better understand memory in people as they age.

PRESS 1 AND ENTER TO CONTINUE

---

# CG2                      cg5ratememry                  R5 CG2 RATE YOUR MEMORY

**DISPLAY INSTRUCTIONS:**

Display "at the present time" in bold underlined text.

**QUESTION TEXT:**

First, how would you rate your memory at the present time? Would you say it is excellent, very good, good, fair, or poor?

**CODES**

| | |
|---|---|
| 1 | EXCELLENT |
| 2 | VERY GOOD |
| 3 | GOOD |
| 4 | FAIR |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

---

**BOX CG3**         **BOX CG3**                    NOT ON FILE

If CG2 =1 (excellent) or 2 (very good), go to CG4
Otherwise go to CG3.

---

**CG3**              **cg5ofmemprob**               R5 CG3 OFTN MEMRY PROBS INTERFER

**QUESTION TEXT:**

SHOW CARD CG1

In the last month, how often did memory problems interfere with your daily activities? Would you say every day, most days, some days, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOMEDAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

**CG4**              **cg5memcom1yr**               R5 CG4 MEMRY COMPARD TO 1 YR AGO

**DISPLAY INSTRUCTIONS:**

Display "1 year ago" in bold underlined text.

**QUESTION TEXT:**

SHOW CARD CG2

Compared to **1 year ago**, would you say your memory is much better now, better now, about the same, worse now, or much worse now than it was then?

**CODES**

| | |
|---|---|
| 1 | MUCH BETTER |
| 2 | BETTER |
| 3 | SAME |
| 4 | WORSE |
| 5 | MUCH WORSE |
| | REFUSED |
| | DON'T KNOW |

**CG6PRE**               **CG6PRE**               NOT ON FILE

**QUESTION TEXT:**

We're interested in how memory actually works. We find that even people with very good memories seem to forget some things from time to time. The next questions are a little different, but are often asked on studies about memory.

PRESS 1 AND ENTER TO CONTINUE

---

**CG6A**            **cg5todaydat1**        R5CG6Aa TODAY'S DATE CORRECT MNTH

                       **cg5todaydat2**        R5 CG6Ab TODAY'S DATE CORRECT DAY

                       **cg5todaydat3**        R5 CG6Ac TODAY'S DATE CORRECT YR

                       **cg5todaydat5**        R5 CG6Ad USED AID FOR MTH DAY YEAR

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

If at CG6a, do not display question text in brackets. Otherwise, display question text in brackets.
Spell out month in question text and also as a numeric date as indicated in interviewer question text.
If at CG6a, display "IF SP DID NOT ALREADY MENTION THE MONTH, PROBE: What is the month?"
If at CG6b, display "IF SP DID NOT ALREADY MENTION THE DAY, PROBE: What is the day?"
If at CG6c, display "IF SP DID NOT ALREADY MENTION THE YEAR, PROBE: What is the year?"

Display "month" ,"day" and "year" in each of the probes in bold underlined text.

For display of "TODAY'S DATE IS:" display TODAY'S date.

Display "MONTH", "DAY", and "YEAR" in bold underlined text.

**QUESTION TEXT:**

{[}Without looking at a calendar or watch, please tell me today's date.{]}

TODAY'S DATE IS: {MONTH DAY,YEAR} {(mm/dd/yyyy)}
{IF SP DID NOT ALREADY MENTION THE MONTH, PROBE: What is the month?}
{IF SP DID NOT ALREADY MENTION THE DAY, PROBE: What is the day?}
{IF SP DID NOT ALREADY MENTION THE YEAR, PROBE: What is the year?}

CODE NO (2) FOR DON'T KNOW RESPONSES

RESPONSE [1] a. DID SP SAY THE CORRECT MONTH?
RESPONSE [2] b. DID SP SAY THE CORRECT DAY?
RESPONSE [3] c. DID SP SAY THE CORRECT YEAR?
RESPONSE [4] d. DID SP LOOK AT A CALENDAR, NEWSPAPER, WATCH, OR OTHER AID FOR THE DATE?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO/DON'T KNOW |
| | REFUSED |

**PROGRAMMER INSTRUCTIONS:**

Disallow RF for response [4]d.

---

**CG6B**            **cg5todaydat4**        R5 CG6Ba TODAY'S DATE CORRECT DOW

                       **cg5todaydat6**        R5 CG6Bb USED AID FOR DAY OF WEEK

**DISPLAY INSTRUCTIONS:**

For display of "TODAY IS:" display day of the week for TODAY's date.

Display "DAY OF THE WEEK" in bold underlined text.

**QUESTION TEXT:**

Without looking at a calendar or watch, please tell me what day of the week it is.

TODAY IS: {DAY OF THE WEEK}.

CODE NO (2) FOR DON'T KNOW RESPONSES.

RESPONSE [1] a. DID SP SAY THE CORRECT DAY OF THE WEEK?
RESPONSE [2] b. DID SP LOOK AT A CALENDAR, NEWSPAPER, WATCH, OR OTHER AID FOR THE DAY OF THE WEEK?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO/DON'T KNOW |
| | REFUSED |

**PROGRAMMER INSTRUCTIONS:**

Disallow RF for response [2]d.

---

**BOX CG7**   BOX CG7   NOT ON FILE

If PROXY flag =1 and (CG6Aa-CG6Ad and CG6Ba-CG6Bb =2 (NO/DON'T KNOW) or REFUSED, go to Section MO Mobility.
Otherwise, go to CG7PRE.

---

**CG7PRE**   cg5prewrdrcl   R5 CG7PRE INTRO TO WORD RECALL

**QUESTION TEXT:**

Now I will read a set of 10 words and ask you to recall as many as you can. We have purposely made the list long so that it will be difficult for anyone to recall all the words.  Most people recall just a few.  Please listen carefully as I read the set of words because I cannot repeat them. When I finish, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

IF SP ASKS TO WRITE DOWN WORDS, SAY:  We want you to try to recall the words without any help.

REPEAT INSTRUCTIONS ABOVE AS NEEDED FOR SP TO UNDERSTAND ACTIVITY BEFORE CONTINUING

**CODES**

| | | |
|---|---|---|
| 1 | CONTINUE WITH ACTIVITY | |
| 2 | SP REFUSES ACTIVITY | CG9 |

---

**CG7**   cg5dwrdlstnm   R5 D WHICH WORD LIST ASSIGNED

**DISPLAY INSTRUCTIONS:**

If WORD RECALL LIST 2ND ADMIN = 1 (from preload), display words from word list 1.
Else if WORD RECALL LIST 2ND ADMIN = 2(from preload), display words from word list 2.
Else if WORD RECALL LIST 2ND ADMIN = 3(from preload), display words from word list 3.

Display one word from list 1, 2, or 3 one at a time every 2 seconds using Blaise timer application.
Display words in font size 36 in the middle of the screen.

Display interviewer instruction at the top of the screen in regular font size.

{variable text [1-3]}

[LIST 1]
Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]
Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]
Water
Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

**QUESTION TEXT:**
READ THE WORDS DISPLAYED AT A SLOW, STEADY RATE AS THEY COME UP ON THE SCREEN.
APPROXIMATELY 1 WORD EVERY 2 SECONDS

PRESS 1 AND ENTER TO CONTINUE

**PROGRAMMER INSTRUCTIONS:**
After the last word, automatically advance screen to CG8.

---

**CG7A**          **CG7A**          NOT ON FILE

**QUESTION TEXT:**
AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE.

---

**CG8**          **cg5wrdsrcal1**          R5 CG8 1 TELL WORDS U CAN RECALL

                           **cg5wrdsrcal2**          R5 CG8 2 TELL WORDS U CAN RECALL

| | |
|---|---|
| **cg5wrdsrcal3** | R5 CG8 3 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal4** | R5 CG8 4 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal5** | R5 CG8 5 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal6** | R5 CG8 6 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal7** | R5 CG8 7 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal8** | R5 CG8 8 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal9** | R5 CG8 9 TELL WORDS U CAN RECALL |
| **cg5wrdsrcal10** | R5 CG8 10 TELLWORDS U CAN RECALL |
| **cg5dwrdunnrc** | R5 D SCORE IMMEDIATE WORD RECALL |
| **cg5dwrdinone** | R5 D IMMEDIATE RECALL NONE |
| **cg5dwrdirref** | R5 D IMMEDIATE RECALL REFUSED |

**DISPLAY INSTRUCTIONS:**
Display word list that was presented in CG7 for this administration.
Display response codes 91 and 92 response categories in a column beside the word list.

**QUESTION TEXT:**

Now please tell me the words you can recall.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE:   Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]
Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]
Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]
Water

Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

91. NO WORDS REMEMBERED
92. REFUSED

**PROGRAMMER INSTRUCTIONS:**

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message "INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

If 91 or 92 selected, go to CG9.

---

## CG8A                  cg5wrdsntlst          R5 CG8A WORDS NOT ON LIST

**DISPLAY INSTRUCTIONS:**
Display "not" in underlined text.

**QUESTION TEXT:**
DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

**CODES**
| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | CG9 |

---

## CG8B                  cg5numnotlst          R5 CG8B NUM WORDS NOT ON LIST

**DISPLAY INSTRUCTIONS:**
Display "not" in underlined text.

**QUESTION TEXT:**
HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

ENTER NUMBER
RANGE 1-10

**ENTER NUMBER**
Range                                          1 to 10

---

## CG9                  cg5probreca1          R5 CG9 SP HAD DIFF HEARING WORDS

cg5probreca2          R5 CG9 INTERRUPTION AS LIST READ

cg5probreca3          R5 CG9 PROB WORD RECALL SPECIFY

cg5probreca4          R5 CG9 WD RECALL NO PROB OCCURRD

cg5probreca5          R5 CG9 SP REFUSED WORD RECALL

**QUESTION TEXT:**

DID SP HAVE ANY PROBLEMS DURING THE WORD RECALL TASK?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | DIFFICULTY HEARING ANY OF THE WORDS | CG10 |
| 2 | INTERRUPTION OCCURRED WHILE LIST WAS BEING READ | CG10 |
| 91 | OTHER PROBLEM (SPECIFY) | |
| 92 | NO PROBLEMS OCCURRED | CG10 |
| 97 | SP REFUSED WORD RECALL TASK | CG10 |

**PROGRAMMER INSTRUCTIONS:**

Disallow RF for response [2]d.

---

## CG9A                          CG9A                                   NOT ON FILE

**QUESTION TEXT:**

SPECIFY THE TYPE OF PROBLEM EXPERIENCED DURING WORD RECALL TASK

**ENTER TEXT**

Length                                              255

---

## CG10                          cg5dclkdraw            R5 D SCORE OF CLOCK DRAWING TEST
                                 cg5dclkimgcl           R5 D IMAGE CLARITY CLOCK DRAWING

**DISPLAY INSTRUCTIONS:**

Display "blank" in bold underlined text.

Display "REPEAT INSTRUCTIONS IF NEEDED" in bold underlined text.

**QUESTION TEXT:**

SET STOPWATCH FOR 2 MINUTES IN COUNTDOWN MODE

HAND SP A BLANK SHEET OF PAPER AND AN ERASABLE PEN

IF NEEDED, MAKE SURE SP HAS A WRITING SURFACE.   THEN SAY:

Please draw a clock on this piece of paper.

Start by drawing a large circle.

Put all the numbers in the circle and set the hands to show 11:10 (10 past 11).

START STOPWATCH

REPEAT INSTRUCTIONS IF NEEDED.

STOP ACTIVITY WHEN 2 MINS IS UP OR BEFORE IF SP SAYS DONE

PRESS 1 AND ENTER TO CONTINUE

---

## CG10A                         cg5atdrwclck           R5 CG10A ATTEMPT CLOCK DRAWIG

> INDICATE WHETHER SP ATTEMPTED CLOCK DRAWING
>
> IF SP ATTEMPTED CLOCK DRAWING, AFFIX SP ID LABEL ON THE LOWER LEFT HAND CORNER OF CLOCK DRAWING SHEET

**CODES**

| | |
|---|---|
| 1 | SP ATTEMPTED CLOCK DRAWING |
| 2 | SP DID NOT ATTEMPT CLOCK DRAWING |
| 97 | SP REFUSED CLOCK DRAWING |

---

**CG13**

| | | |
|---|---|---|
| | cg5presidna1 | R5 CG13A PRES LAST NAME CORRECT |
| | cg5presidna2 | R5 CG13B PRES LAST NAME INCORRCT |
| | cg5presidna3 | R5 CG13C PRES FIRST NAME CORRCT |
| | cg5presidna4 | R5 CG13D PRES FIRST NAME INCORR |

**DISPLAY INSTRUCTIONS:**

Display "FIRST"" "LAST", "first"' and "last" in underlined text.

**QUESTION TEXT:**

> Next, who is the President of the United States right now?
>
> CORRECT ANSWER IS BARACK OBAMA
>
> IF ONLY FIRST NAME GIVEN, ASK: Do you know his last name?
> IF ONLY LAST NAME GIVEN, ASK: Do you know his first name?
>
> SELECT ALL THAT APPLY

**CODES**

| | |
|---|---|
| 1 | LAST NAME CORRECT |
| 2 | LAST NAME NOT CORRECT/DK LAST NAME |
| 3 | FIRST NAME CORRECT |
| 4 | FIRST NAME NOT CORRECT/DK FIRST NAME |
| | REFUSED |

**PROGRAMMER INSTRUCTIONS:**

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message "INCOMPLETE ANSWER. A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED.

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".
If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

---

**CG14**

| | | |
|---|---|---|
| | cg5vpname1 | R5 CG14A VP PRES LAST NAME CORRECT |
| | cg5vpname2 | R5 CG14B VP PRES LAST NAME INCORRCT |
| | cg5vpname3 | R5 CG14C VP PRES FIRST NAME CORRCT |
| | cg5vpname4 | R5 CG14D VP PRES FIRST NAME INCORR |

**DISPLAY INSTRUCTIONS:**

Display "FIRST", "LAST", "first", and "last" in underlined text.

**QUESTION TEXT:**

> Who is the Vice President?
>
> CORRECT ANSWER IS JOE (JOSEPH) BIDEN
>
> IF ONLY FIRST NAME GIVEN, ASK:   Do you know his last name?
> IF ONLY LAST NAME GIVEN, ASK:   Do you know his first name?
>
> SELECT ALL THAT APPLY

**CODES**

| | |
|---|---|
| 1 | LAST NAME CORRECT |
| 2 | LAST NAME NOT CORRECT/DK LAST NAME |
| 3 | FIRST NAME CORRECT |
| 4 | FIRST NAME NOT CORRECT/DK FIRST NAME |
| | REFUSED |

**PROGRAMMER INSTRUCTIONS:**

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message "INCOMPLETE ANSWER.  A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED."

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".
If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

---

| **BOX CG15** | **BOX CG15** | NOT ON FILE |
|---|---|---|

> IF CG7PRE = 2 (SP REFUSES ACTIVITY), GO TO SECTION MO – MOBILITY.
> ELSE GO TO CG15.

---

| **CG15** | | |
|---|---|---|
| | **cg5wrdsdcal1** | R5 CG15 1 DELAYED WORD RECALL |
| | **cg5wrdsdcal2** | R5 CG15 2 DELAYED WORD RECALL |
| | **cg5wrdsdcal3** | R5 CG15 3 DELAYED WORD RECALL |
| | **cg5wrdsdcal4** | R5 CG15 4 DELAYED WORD RECALL |
| | **cg5wrdsdcal5** | R5 CG15 5 DELAYED WORD RECALL |
| | **cg5wrdsdcal6** | R5 CG15 6 DELAYED WORD RECALL |
| | **cg5wrdsdcal7** | R5 CG15 7 DELAYED WORD RECALL |
| | **cg5wrdsdcal8** | R5 CG15 8 DELAYED WORD RECALL |
| | **cg5wrdsdcal9** | R5 CG15 9 DELAYED WORD RECALL |
| | **cg5wrdsdcal10** | R5 CG15 10 DELAYED WORD RECALL |
| | **cg5dwrddlyrc** | R5 D SCORE DELAYED WORD RECALL |
| | **cg5dwrddnone** | R5 D DELAYED RECALL NONE |
| | **cg5dwrddrref** | R5 D DELAYED RECALL REFUSED |

**DISPLAY INSTRUCTIONS:**

Display word list that was presented in CG7.
Display response codes 91 and 92 response categories in a column beside the word list.

**QUESTION TEXT:**

A little while ago, I read you a list of 10 words and you repeated the ones you could remember. Please tell me any of the words that you remember now.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE:   Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]
Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]
Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]
Water
Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

91. NO WORDS REMEMBERED
92. REFUSED

**PROGRAMMER INSTRUCTIONS:**

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message "INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

**CG15A**               **CG15A**                              NOT ON FILE

**QUESTION TEXT:**
AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE

**PROGRAMMER INSTRUCTIONS:**
   If CG15 = 91 or 92, go to Section MO – Mobility.

---

**CG16**                    **cg5wrdsnotlst**              R5 CG16 WORDS NOT ON LIST

**DISPLAY INSTRUCTIONS:**
   Display "not" in underlined text.

**QUESTION TEXT:**
   DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

**CODES**
   1          YES
   2          NO                                              SECTION MO

---

**CG17**                    **cg5numwrdnot**              R5 CG17 NUM OF WORDS NOT ON LIST

**DISPLAY INSTRUCTIONS:**
   Display "not" in underlined text.

**QUESTION TEXT:**
   HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

   ENTER NUMBER

   RANGE 1-10

**ENTER NUMBER**
            Range                                          1 to 10

---

| Derived Variables from Items in CG Section | |
|---|---|
| **cg5dwrd1rcl** | R5 D WORD1 IMMEDIATE RECALL |
| **cg5dwrd2rcl** | R5 D WORD2 IMMEDIATE RECALL |
| **cg5dwrd3rcl** | R5 D WORD3 IMMEDIATE RECALL |
| **cg5dwrd4rcl** | R5 D WORD4 IMMEDIATE RECALL |
| **cg5dwrd5rcl** | R5 D WORD5 IMMEDIATE RECALL |
| **cg5dwrd6rcl** | R5 D WORD6 IMMEDIATE RECALL |
| **cg5dwrd7rcl** | R5 D WORD7 IMMEDIATE RECALL |
| **cg5dwrd8rcl** | R5 D WORD8 IMMEDIATE RECALL |
| **cg5dwrd9rcl** | R5 D WORD9 IMMEDIATE RECALL |
| **cg5dwrd10rcl** | R5 D WORD10 IMMEDIATE RECALL |
| **cg5dwrdunnrc** | R5 D WORD DELAYED RECALL [See CG8] |
| **cg5dwrdinone** | R5 D IMMEDIATE RECALL NONE [See CG8] |

| | |
|---|---|
| **cg5dwrdirref** | R5 D IMMEDIATE RECALL REFUSED [See CG8] |
| **cg5dwrd1dly** | R5 D WORD1 DELAYED RECALL |
| **cg5dwrd2dly** | R5 D WORD2 DELAYED RECALL |
| **cg5dwrd3dly** | R5 D WORD3 DELAYED RECALL |
| **cg5dwrd4dly** | R5 D WORD4 DELAYED RECALL |
| **cg5dwrd5dly** | R5 D WORD5 DELAYED RECALL |
| **cg5dwrd6dly** | R5 D WORD6 DELAYED RECALL |
| **cg5dwrd7dly** | R5 D WORD7 DELAYED RECALL |
| **cg5dwrd8dly** | R5 D WORD8 DELAYED RECALL |
| **cg5dwrd9dly** | R5 D WORD9 DELAYED RECALL |
| **cg5dwrd10dly** | R5 D WORD10 DELAYED RECALL |
| **cg5dwrddlyrc** | R5 D SCORE DELAYED WORD RECALL [See CG15] |
| **cg5dwrddnone** | R5 D DELAYED RECALL NONE [See CG15] |
| **cg5dwrddrref** | R5 D DELAYED RECALL REFUSED [See CG15] |

---

## MO1PRE                    MO1PRE                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "going outside".
Otherwise, display "leaving {your/SP's} {home/building} to go outside".
If STRUCTURE flag = 2 (MULTI-UNIT), display "building".
Otherwise, display "home".

**QUESTION TEXT:**

Now we're going to ask about {leaving {your/SP's} {home/building} to go outside/going outside}.

PRESS 1 AND ENTER TO CONTINUE

---

## MO1                    mo5outoft                    R5 MO1 OFTEN GO OUTSIDE

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".
Otherwise, display "leave {your/his/her} {home/building} to".

**QUESTION TEXT:**

SHOW CARD MO1

In the last month {of {his/her} life}, how often did {you/SP} {leave {your/his/her} {home/building} to} go outside?  Would you say every day, most days, some days, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMERS INSTRUCTIONS:**

If MO1 = 5 (NEVER) SET DIDNTLEAVE FLAG TO 1 (YES)

---

## BOX MO2                    BOX MO2                    NOT ON FILE

If DECEASED flag = 1 (YES) and MO1 = 5 (NEVER), go to MO12.
Else if DECEASED flag = 1 (YES), go to MO6.
Else if MO1 = 5 (NEVER), go to MO10.

Else if CANE FLAG=1 (YES), go to MO2.
Otherwise, go to BOX MO3.

---

## MO2                    mo5outcane                    R5 MO2 CANE USED OUTSIDE

**QUESTION TEXT:**

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} cane?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX MO3** | **BOX MO3** | NOT ON FILE |
|---|---|---|

IF WALKER FLAG=1 (YES), GO TO MO3
ELSE GO TO BOX MO4

---

| **MO3** | **mo5outwalkr** | R5 MO3 WALKER USED OUTSIDE |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} walker?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX MO4** | **BOX MO4** | NOT ON FILE |
|---|---|---|

If WHEELCHAIR flag = 1 (yes), go to MO4.
Otherwise, go to BOX MO5.

---

| **MO4** | **mo5outwlchr** | R5 MO4 WHEELCHAIR USED OUTSIDE |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} wheelchair?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |

| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

## BOX MO5

**BOX MO5**                    NOT ON FILE

If SCOOTER flag = 1 (yes), go to MO5.
Otherwise, go to MO6.

---

## MO5

**mo5outsctr**                 R5 MO5 SCOOTER USED OUTSIDE

**QUESTION TEXT:**

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} scooter?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

## MO6

**mo5outhlp**                  R5 MO6 HELP GO OUTSIDE

**DISPLAY INSTRUCTIONS:**
If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived}},".
If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives" and "leave {your/his/her} {home/building} to".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} {leave {your/his/her} {home/building} to} go outside?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/him/her}.

**CODES**
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX MO6A

**BOX MO6A**                   NOT ON FILE

If DECEASED flag = 1 (YES) and MO6 = 2 (NO), RF, or DK, go to BOX MO12.
Else if MO6 = 2 (NO), RF, or DK, go to MO8.

# MO6A

**op5outhlp**  R5 MO6A HELPS SP GO OUTSIDE

**op5relatnshp**  R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODE LIST.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If DECEASED flag = 1 (YES), display "lived".
Otherwise, display "lives" and "(leave {your/his/her} {home/building} to".

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived},}".

If FACILITY flag=1 (YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the roster.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who helped {you/SP} do that ({leave {your/his/her} {home/building} to} go outside)?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MO6b.  [What is (his/her) first name?]   CONFIRM SPELLING
MO6c.  [What is (his/her) last name?]   CONFIRM SPELLING
MO6d.  [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |

| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at MO6, set HELPSGOOUTSIDE flag = 1 (yes).
If DECEASED flag = 1 (YES), go to BOX MO12.

---

# MO7                    **mo5outslf**                    R5 MO7 LEFT BY YOURSELF

**DISPLAY INSTRUCTIONS:**
DISPLAY "{by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> SHOW CARD MO3
>
> In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} do this by {yourself/himself/herself}?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**
| 1 | MOST TIMES | |
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | MO9 |
| | REFUSED | |
| | DON'T KNOW | |

---

# MO8                    **mo5outdif**                    R5 MO8 HOW DIFFICULT

**DISPLAY INSTRUCTIONS:**
DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO2 = 1,2,3, or 4 (uses cane when leaving building or MO3 = 1,2,3, or 4 (uses walker when leaving building) or MO4 = 1,2,3, or 4 (uses wheelchair when leaving building) or MO5 = 1,2,3, or 4 (uses scooter when leaving building), display "when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}".

If MO2 = 1,2,3, or 4 (uses cane when leaving building), display "cane".
If MO3 = 1,2,3, or 4 (uses walker when leaving building), display "walker".

If MO4 = 1,2,3, or 4 (uses wheelchair when leaving building), display "wheelchair".
If MO5 = 1,2,3, or 4 (uses scooter when leaving building), display "scooter".
If more than one (MO2, MO3, MO4, MO5) = 1,2,3, or 4 (used inside), insert "or" between the names of the devices.

**QUESTION TEXT:**

In the last month, {when {you/SP} used {your/his/her}{cane / walker / wheelchair / scooter}}, how much difficulty did {you/{he/she}} have leaving {your/his/her} {home/building} to go outside by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

# MO9                  mo5outyrgo                R5 MO9 HOW OFTEN LEAVE

**DISPLAY INSTRUCTIONS:**

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} now leave {your/his/her} {home/building} more often, less often or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | ABOUT THE SAME |
| | REFUSED |
| | DON'T KNOW |

---

# BOX MO10            BOX MO10                 NOT ON FILE

If MO6 = 2 (no help to go outside) and MO8 = 1 (no difficulty going outside by self), go to MO11PRE.

Otherwise, go to MO10.

---

# MO10                mo5outwout               R5 MO10 STAYED IN NO HELP

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO1 = 5 (never left building) or MO7 = 4 (never left building by self), display "no one was there to help {you/him/her} go out".

Otherwise display "{you/he/she} had difficulty going out by {yourself/himself/herself}"..

**QUESTION TEXT:**

In the last month, did {you/SP} ever have to stay in {your/his/her} {home/building} because {no one was there to help {you/him/her} go out/ {you/he/she} had difficulty going out by {yourself/himself/herself}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |

REFUSED
DON'T KNOW

---

**MO11PRE**  MO11PRE  NOT ON FILE

**DISPLAY INSTRUCTIONS:**
    If STRUCTURE flag = 2 (multi-unit), display "or building".

**QUESTION TEXT:**
    These next few questions are about getting around inside {your/SP's} home {or building}.

    PRESS 1 AND ENTER TO CONTINUE

---

**BOX MO11**  BOX MO11  NOT ON FILE

    If STRUCTURE flag = 2 (multi-unit), go to MO11
    Otherwise, go to BOX MO12.

---

**MO11**  **mo5oftgoarea**  R5 MO11 HOW OFTEN GO OTHER AREAS

**DISPLAY INSTRUCTIONS:**
    If FACILITY flag = 1 (yes), display "{apartment/room/unit/suite/other}".
    Otherwise, display "home".

**QUESTION TEXT:**
    SHOW CARD MO1

    In the last month, how often did {you /SP} leave {your/his/her} {home/{apartment/room/unit/suite/other}} to go into other areas of the building? Would you say every day, most days, some days, rarely, or never?

**CODES**
    1        EVERY DAY (7 DAYS A WEEK)
    2        MOST DAYS (5-6 DAYS A WEEK)
    3        SOME DAYS (2-4 DAYS A WEEK)
    4        RARELY (ONCE A WEEK OR LESS)
    5        NEVER
             REFUSED
             DON'T KNOW

**PROGRAMMERS INSTRUCTIONS:**
    If MO1 = 5 (NEVER) SET DIDNTLEAVE FLAG TO 1 (YES)

---

**BOX MO12**  BOX MO12  NOT ON FILE

    If DECEASED flag = 1 (YES) and MO1 = 5 (NEVER LEFT HOME), go to MO12.
    Else if DECEASED flag = 1 (YES), go to MO18.

    Else if STRUCTURE flag = 2 (multi-unit) and MO1 = 5 (never leave building) and MO11= 5 (never go to other parts of building), go to MO12.

    Else if [STRUCTURE flag = 1 (single home) or STRUCTURE flag = 3 (Other)] and MO1 = 5 (never leave home), go to MO12.

    Otherwise, go to BOX MO13.

---

**MO12**  **mo5oflvslepr**  R5 MO12 HOW OFTN LEAVE BEDROOM

**DISPLAY INSTRUCTIONS:**
>    If DECEASED flag = 1 (YES), display "of {his/her} life" and "slept".
>    Otherwise, display "sleeps".

**QUESTION TEXT:**

> SHOW CARD MO1
>
> In the last month {of {his/her} life}, how often did {you/SP} leave the room where {you sleep/{he/she} {sleeps/slept}}? Would you say every day, most days, some days, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
>    If MO12 =5 (never leaves room), set each roster selection/addition at HA25, set HELPEDWITHMEALS flag = 1 (yes).

**BOX MO13**  **BOX MO13**  NOT ON FILE

> If DECEASED flag = 1 (YES), and Mo12 = 5 (NEVER), go to MO25.
> Else if DECEASED = 1 (YES), go to MO18.
> Else if MO12 = 5 (NEVER), go to MO23.
> Else if CANE flag = 1 (YES), go to MO13.
> Otherwise, go to BOX MO14.

**MO13**  **mo5insdcane**  R5 MO13 OFTEN USED CANE INSIDE

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/SP} use {your/his/her} cane?  Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

**BOX MO14**  **BOX MO14**  NOT ON FILE

> If WALKER flag = 1 (yes), go to MO14.
> Otherwise, go to BOX MO15.

**MO14**  **mo5insdwalkr**  R5 MO14 OFTEN USED WALKER INSIDE

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/he/she} use {your /his/her} walker? Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX MO15** | **BOX MO15** | NOT ON FILE |
|---|---|---|

> If WHEELCHAIR HOME flag = 1 (yes), go to MO15.
> Otherwise, go to BOX MO16.

---

| **MO15** | **mo5insdwlchr** | R5 MO15 OFT USD WHEELCHAR INSIDE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

> If STRUCTURE flag = 2 (multi-unit), display "or building".

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} wheelchair? Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX MO16** | **BOX MO16** | NOT ON FILE |
|---|---|---|

> If SCOOTER HOME flag = 1 (yes), go to MO16.
> Otherwise, go to MO17.

---

| **MO16** | **mo5insdsctr** | R5 MO16 OFTEN USD SCOOTER INSIDE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

> If STRUCTURE flag = 2 (multi-unit), display "or building".

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} scooter? Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

# MO17                mo5oftholdwl            R5 MO17 OFTEN HOLD WALLS INSIDE

**DISPLAY INSTRUCTIONS:**

> If STRUCTURE flag = 2 (multi-unit), display "or building".

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} scooter? Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

# MO18                mo5insdhlp            R5 MO18 GOT HELP INSIDE

**DISPLAY INSTRUCTIONS:**

> If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
> Otherwise, display "lives" and "{your/his/her} home {or building}".
>
> If STRUCTURE flag = 2 (multi-unit), display "or building".
>
> If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived},".

**QUESTION TEXT:**

> In the last month {of {his/her} life}, did anyone ever help {you/SP} get around inside {{your/his/her} home {or building}}?
> IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

**CODES**

| | |
|---|---|
| 1 | YES |

2          NO
           REFUSED
           DON'T KNOW

---

**BOX MO19A**              **BOX MO19A**              NOT ON FILE

---

If DECEASED flag = 1 (YES) and MO18 = 2 (NO), RF, or DK, go to MO25.
Else if MO18 = 2 (NO), RF, or DK, go to MO21.
Otherwise, go to MO19A.

---

**MO19A**                  **op5insdhlp**          R5 MO19A HELPS SP INSIDE HOUSE

                           **op5relatnshp**        R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODE LIST.

If DECEASED flag = 1 (YES), display "lived".
Otherwise, display "lives" and "{your/SP's} home {or building}".

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived},".

If STRUCTURE flag = 2 (multi-unit), display "or building".

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag=1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the person roster.

Display "first" and "last" in underlined text

**QUESTION TEXT:**

Who helped with that (getting around inside {{your/SP's} home {or building}})?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}},} or someone paid to help {you/{him/her}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MO19b. [What is (his/her) first name?] CONFIRM SPELLING
MO19c. [What is (his/her) last name?] CONFIRM SPELLING
MO19d. [What is {his/her} relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**
2          SPOUSE/PARTNER
3          DAUGHTER
4          SON
5          DAUGHTER-IN-LAW
6          SON-IN-LAW
7          STEPDAUGHTER
8          STEPSON
9          SISTER
10         BROTHER

| | |
|---|---|
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
> For each roster selection/addition at MO19, set HELPSAROUNDINSIDE flag = 1 (yes).

---

| **BOX MO20** | **BOX MO20** | NOT ON FILE |
|---|---|---|

> If DECEASED FLAG=1 (YES), go to MO25.
> Otherwise, go to MO20.

---

| **MO20** | **mo5insdslf** | R5 MO20 HOW OFTEN BY YOURSELF |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

> DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

> If STRUCTURE flag = 2 (multi-unit), display "or building,".
> Otherwise, display only the comma after "home"

**QUESTION TEXT:**

> SHOW CARD MO3
>
> In the last month, when {you/SP} went around inside {your/his/her} home {,/or building,} how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| | NEVER                                                    MO22 |
| | REFUSED |
| | DON'T KNOW |

---

## MO21         mo5insddif        R5 MO21 HOW DIFF GET ARD W DEVCE

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO13 = 1,2,3, or 4 (used cane inside) or MO14 = 1,2,3, or 4 (used walker inside) or MO15 = 1,2,3, or 4 (used wheelchair inside) or MO16 = 1,2,3, or 4 (used scooter inside), display "when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}".

If MO13 = 1,2,3, or 4 (used cane inside), display "cane".

If MO14 = 1,2,3, or 4 (used walker inside), display "walker".
If MO15 = 1,2,3, or 4 (used wheelchair inside), display "wheelchair".
If MO16 = 1,2,3, or 4 (used scooter inside), display "scooter".
If more than one (MO13, MO14, MO15, MO16) = 1,2,3, or 4 (used inside), insert "or" between the names of the devices.

If STRUCTURE flag = 2 (multi-unit), display "or building".

**QUESTION TEXT:**

In the last month, {when {you/SP} used {your/his/her}{cane/walker/wheelchair/scooter},} how much difficulty did {you/SP} have getting around inside {your/his/her} home {or building} by {yourself/himself/herself}?  Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

## MO22         mo5insdyrgo        R5 MO22 HOW OFTEN COMPRED YR AGO

**DISPLAY INSTRUCTIONS:**

If STRUCTURE flag = 2 (multi-unit), display "or building".

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} now leave {your/his/her} home {or building} more often, less often or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | ABOUT THE SAME |
| | REFUSED |

DON'T KNOW

---

**BOX MO23**  　　　　　**BOX MO23**  　　　　　NOT ON FILE

> If MO18 = 2 (did not get help getting around inside) and MO21= 1 (no difficulty getting around inside), go to MO24PRE.
> Otherwise, go to MO23.

---

**MO23**  　　　　　**mo5insdwout**  　　　　　R5 MO23 PLACES INSIDE DID NOT GO

**DISPLAY INSTRUCTIONS:**

　　　DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

　　　If STRUCTURE flag = 2 (multi-unit), display "or building".

　　　If MO20 = 4 (never went around inside by self) or MO12 = 5 (never left room where slept), display "no one was there to help {you/him/her}".

　　　Otherwise display "it was too difficult to go there by {yourself/himself/herself}".

**QUESTION TEXT:**

> In the last month, were there any places in {your/SP's} home {or building} that {you/he/she} did not go because {no one was there to help {you/him/her}/it was too difficult to go there by {yourself/himself/herself}}?

**CODES**

　　　1　　　　　YES
　　　2　　　　　NO
　　　　　　　　　REFUSED
　　　　　　　　　DON'T KNOW

---

**MO24PRE**  　　　　　**MO24PRE**  　　　　　NOT ON FILE

**QUESTION TEXT:**

> These next few questions are about getting in and out of bed.
>
> PRESS 1 AND ENTER TO CONTINUE

---

**BOX MO24**  　　　　　**BOX MO24**  　　　　　NOT ON FILE

> If CANE flag = 1 (yes) or WALKER flag = 1 (yes), go to MO24.
> Otherwise, go to MO25.

---

**MO24**  　　　　　**mo5beddev**  　　　　　R5 MO24 OUT OF BED USED DEVICE

**DISPLAY INSTRUCTIONS:**

　　　If CANE flag = 1 (yes) and WALKER flag is null, display "cane".
　　　If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".
　　　If CANE flag is null and WALKER flag = 1 (yes), display "walker".

**QUESTION TEXT:**

> SHOW CARD MO2
>
> In the last month, when {you/SP} got out of bed, how often did {you/he/she} use {your/his/her} {cane /

walker / cane or walker} to help? Would you say every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

# MO25                    **mo5bedhlp**                R5 MO25 GOT HELP OUT OF BED

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} {lives/lived}},".

If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} get out of bed?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}},} or someone paid to help {you/him/her

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# BOX MO25A          **BOX MO25A**                NOT ON FILE

If DECEASED flag = 1 (YES) and MO25 = 2 (NO), RF, or DK, go to Section DM - Duration of Mobility Accommodations.

Else if MO25 = 2 (NO), RF, or DK, go to MO27.
Otherwise, go to MO25A.

---

# MO25A          **op5bedhlp**                R5 MO25A HELPS SP OUT OF BED

                    **op5relatnshp**                R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag=1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text

**QUESTION TEXT:**

Who helped {you/SP} do that (get out of bed)?
PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

MO25b. [What is (his/her) first name?]  CONFIRM SPELLING

MO25c. [What is (his/her) last name?]  CONFIRM SPELLING

MO25d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

For each roster selection/addition at MO25, set HELPSOUTOFBED flag = 1 (yes).

| BOX MO26 | BOX MO26 | NOT ON FILE |
|---|---|---|

If DECEASED flag = 1 (YES), go to Section DM - Duration of Mobility Accommodations.

Otherwise, go to MO26.

| MO26 | mo5bedslf | R5 MO26 OFT GOT OUT BED BY SLF |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD MO3

In the last month, when {you/SP} got out of bed, how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

**CODES**

| 1 | MOST TIMES | |
|---|---|---|
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | MO28 |
| 5 | REFUSED | |
| | DON'T KNOW | |

| MO27 | mo5beddif | R5 MO27 DIFF GET OUT BED BY SELF |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO24 = 1,2,3, or 4 (used cane or walker to get out of bed), display "when {you/SP} used {your/his/her} {cane/walker/cane or walker}".
If CANE flag = 1 (yes) and WALKER flag is null, display "cane".
If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".
If CANE flag is null and WALKER flag = 1 (yes), display "walker".

**QUESTION TEXT:**

In the last month, {when {you/SP} used {your/his/her} {cane/walker/cane or walker}} how much difficulty did {you/he/she} have getting out of bed by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

| 1 | NONE |
|---|---|
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

| BOX MO28 | BOX MO28 | NOT ON FILE |
|---|---|---|

If MO25 = 2 (no help getting out of bed) and MO27 = 1 (no difficulty getting out of bed), go to

Section DM, Duration of Mobility Accommodations.

Otherwise, go to MO28

---

**MO28**  **mo5bedwout**  R5 MO28 OFTEN HAD TO STAY IN BED

**DISPLAY INSTRUCTIONS:**
DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO26 = 4 (never got out of bed by self), display "no one was there to help {you/him/her}".

Otherwise display "it was too difficult to get out of bed by {yourself/himself/herself}".

**QUESTION TEXT:**
In the last month, did {you/SP} ever have to stay in bed because {no one was there to help {you/him/her}/ it was too difficult to get out of bed by {yourself/himself/herself}}?

**CODES**
| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

| Derived Variables from Items in MO Section | |
|---|---|
| **mo5doutsfdf** | R5 D EFFORT TO GO OUTSIDE SELF |
| **mo5doutdevi** | R5 D GO OUTSIDE USING DEVICES |
| **mo5douthelp** | R5 D GO OUTSIDE USING HELP |
| **mo5dinsdsfdf** | R5 D MOVE INSIDE SELF |
| **mo5dinsddevi** | R5 D MOVE INSIDE WITH DEVICES |
| **mo5dinsdhelp** | R5 D MOVE INSIDE WITH HELP |
| **mo5dbedsfdf** | R5 D GET OUT OF BED |
| **mo5dbeddevi** | R5 D DEVICE USE 2 GET OUT OF BED |
| **mo5dbedhelp** | R5 D HELP TO GET OUT OF BED |

| Flag Variables Set in MO Section | |
|---|---|
| **fl5didntleav** | R5 F MO SP DID NOT LEAVE HOME |
| **fl5ntlvrmslp** | R5 F MO SP DID NOT LEAVE BEDROOM |

## BOX DM1                    BOX DM1                    NOT ON FILE

> If NEWSAMPLE flag = 1 (YES) and [MO6, MO18, and MO25 <> 1 (YES)], go to DM1.
> Else if NEWSAMPLE flag = 1 (YES), go to DM2.
>
> If DECEASED flag = 1 (YES) and (LAST INT Status = 64 or 61), go to Section SC – Self-Care Activities.
> Else if (LAST INT Status=64), go to Section DT – Driving & Transportation.
>
> Else if DECEASED flag=1 (YES) and [Combined MONTH OF DEATH and YEAR OF DEATH= Combined LAST INT interview month and LAST INT interview year or the month after the LAST INT  interview month and LAST INT interview year(LAST INT interview month+1) or Month of Death=DK or RF], go to Section SC – Self-Care Activities.
>
> Else if [LAST INT MO6, MO18, and MO25 <>1 (YES)] and [CURRENT INT MO6, MO18, or MO25 = 1 (YES)], go to DM3C.
> Else if [LAST INT MO6, MO18, or MO25 = 1 (YES)] and [CURRENT INT MO6, MO18, and MO25 <>1 (YES)], go to DM3D.
> Else if [LAST INT MO6, MO18, OR MO25 = 1 (YES)] and [CURRENT INT MO6, MO18, OR MO25 = 1 (YES)], go to DM3E.
>
> Otherwise, go to DM1.

## DM1                    dm5helpmobil                    R5 DM1 GET HELP WITH MOBILITY

**DISPLAY INSTRUCTIONS:**

> If NEWSAMPLE flag = 1 (YES), display "In the last year".
>
> If DECEASED flag = 1 (YES), display "Between" and "{LAST INT MONTH AND YEAR}" and "and {MONTH AND YEAR OF DEATH}" and "inside, or going outside".
>
> Otherwise if NEWSAMPLE flag <> 1 (YES), display "Since" and "{LAST INT MONTH AND YEAR}" and "{your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}".
>
> If DECEASED flag <>1 (YES) and STRUCTURE flag = 2 (MULTI-UNIT), display "or building", and "leaving {your/his/her} building".
> Otherwise, if DECEASED flag <>1 (YES) and STRUCTURE flag <> 2 (MULTI-UNIT), display "leaving {your/his/her} home".
>
> Display "year" in bold underlined text.

**QUESTION TEXT:**

> {In the last year/{Between/Since} {LAST INT MONTH AND YEAR} {and {MONTH AND YEAR OF DEATH}}, did {you/SP} ever get help with getting out of bed, getting around {inside, or going outside} {{your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DM4 |
| | REFUSED | BOX DM4 |
| | DON'T KNOW | BOX DM4 |

## BOX DM2      BOXDM2      NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to DM3B.
Otherwise, go to DM3C.

## DM2      dm5helpyrmor      R5 DM2 GETTING HELP YR OR MORE

**DISPLAY INSTRUCTIONS:**

If MO25=1 (YES), display "getting out of bed".
If MO18=1 (YES), display "getting around {your/his/her} {home/{apartment/room/unit/suite/other} {or building}".
If MO6=1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "or" between each one.

If STRUCTURE flag = 2 (multi-unit), display "or building", and "leaving {your/his/her} building".
Otherwise, display "leaving {your/his/her} home".

**QUESTION TEXT:**

{Have you/Has SP} been getting help with {getting out of bed} {getting around {your/his/her} home {or building}} {leaving {your/his/her} home/leaving {your/his/her} building} for a year or more?

IF NEEDED: {Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

**CODES**

| | | |
|---|---|---|
| 1 | YES, A YEAR OR MORE | |
| 2 | NO, LESS THAN A YEAR | DM3B |
| | REFUSED | BOX DM4 |
| | DON'T KNOW | BOX DM4 |

## DM3A      dm5yrsgethlp      R5 DM3A HOW MANY YRS GETTNG HELP

**DISPLAY INSTRUCTIONS:**

If only one activity displayed at DM2, display "that".
If more than one activity displayed at DM2, display "any of these activities".

**QUESTION TEXT:**

About how many years {have you/has SP} been getting help with {that/any of these activities}?

ENTER NUMBER OF YEARS

ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 120 |
| Soft Range | 1 to 50 |
| REFUSED | |
| DON'T KNOW | |

Hard range: 1-120 or 997.
Soft range: 1-50.
Go to BOX DM4

---

## DM3B      dm5mthgethlp      R5 DM3B MNTH FIRST LAST GET HLP

**DISPLAY INSTRUCTIONS:**

If DM1 = 1 (help in last year), display "last" and "any of these activities".
If DM2 = 2 (help for less than a year) and only one activity displayed at DM2, display "first" and "that".
If DM2 = 2 (help for less than a year) and more than one activity displayed at DM2, display "first" and "any of these activities".

Display "MONTH" in underlined text.

**QUESTION TEXT:**

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER MONTH

**ENTER NUMBER**

| | |
|---|---|
| RANGE | 1 to 12 |
| REFUSED | BOX DM4 |
| DON'T KNOW | BOX DM4 |

---

## DM3B1      dm5yrgethlp      R5 DM3B YEAR FIRST LAST GET HLP

**DISPLAY INSTRUCTIONS:**

If DM1 = 1 (HELP IN LAST YEAR), display "last" and "any of these activities".

If DM2 = 2 (HELP FOR LESS THAN A YEAR) and only one activity displayed at DM2, display "first" and "that".

If DM2 = 2 (HELP FOR LESS THAN A YEAR) and more than one activity displayed at DM2, display "first" and "any of these activities".
Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

RANGE: CURRENT YEAR-1 to CURRENT YEAR
Go to BOX DM4.

---

## DM3C      dm5helpstmo      R5 DM3C MONTH MOBIL HELP STARTED

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM1 = 1 (YES), do not display the first sentence and display "any of these activities".

Otherwise, display question intro according to the following instructions:
If CURRENT INT MO25 = 1 (YES), display "getting out of bed".
If CURRENT INT MO18 = 1 (YES) and DECEASED flag = 1 (YES), display "getting around inside".
Otherwise if CURRENT INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".
If CURRENT INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside".
Otherwise if CURRENT INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "and" between each one, and "any of these activities".
Otherwise, if only one activity displayed, display "that".

If STRUCTURE flag = 2 (MULTI-UNIT), display "or building", and "leaving {your/his/her} building.

Display "first" in bold underlined text

**QUESTION TEXT:**

{In the last month {of {his/her} life} {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}}/ {{leaving {your/his/her} home/leaving {your/his/her} building }} {{getting around inside} {going outside}}, and at the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} not getting this help.}

In what month since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

**ENTER NUMBER**

| | |
|---|---|
| RANGE | 1 to 12 |
| REFUSED | BOX DM3D |
| DON'T KNOW | BOX DM3D |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 1-12 and 90

If DM3c=90, go to BOX DM4

---

# DM3C1    **dm5helpstyr**    R5 DM3C1 YEAR MOBIL HELP STARTED

**DISPLAY INSTRUCTIONS:**
Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

[In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities)?]

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS**

Soft Range: CURRENT YEAR-1 to CURRENT YEAR
Hard Range: R1 INT YEAR to CURRENT YEAR
Combined month and year cannot be before date of last interview. If date is before date of last interview,

display error message #15.

| **BOX DM3D** | **BOX DM3D** | NOT ON FILE |
|---|---|---|

If [LAST INT MO6, MO18, and MO25 = 2 (NO), RF, or DK] and [CURRENT INT MO6, MO18, or MO25 = 1 (YES)], go to BOX DM4.

Otherwise, go to DM3D.

---

**DM3D**                    **dm5helpendmo**                    R5 DM3D MONTH MOBIL HELP ENDED

**DISPLAY INSTRUCTIONS:**
If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM1 = 1 (YES), do not display the first sentence and display "any of these activities".

Otherwise display question intro according to the following instructions:

If LAST INT MO25 = 1 (YES), display "getting out of bed".
If LAST INT MO18 = 1 (YES) and DECASED flag = 1 (YES), display "getting around inside". Otherwise if LAST INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".
IF LAST INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside". Otherwise if LAST INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "and" between each one and "any of these activities". Otherwise, if only one activity displayed, display "that".

If STRUCTURE flag = 2 (MULTI-UNIT), display "or building", and "leaving {your/his/her} building".

Display "last" in the phrase "last get help" in bold underlined text.

**QUESTION TEXT:**
{At the time of the last interview in {LAST INT MONTH AND YEAR}, {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}}} {{leaving {your/his/her} home/leaving {your/his/her} building}}/{{getting around inside} {going outside}}, and in the last month {of{his/her} life} {you were/SP was} not getting this help.}

In what month since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

**ENTER NUMBER**

| | RANGE | 1 to12 |
|---|---|---|
| | REFUSED | BOX DM4 |
| | DON'T KNOW | BOX DM4 |

**PROGRAMMER INSTRUCTIONS:**
Hard range: 1-12 and 90

If DM3D=90, go to BOX DM4

---

**DM3D1**                    **dm5helpendyr**                    R5 DM3D1 YEAR MOBIL HELP ENDED
**QUESTION TEXT:**
[In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of

these activities}?]

ENTER 4-DIGIT YEAR

**ENTER NUMBER**
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Soft Range: CURRENT YEAR-1 to CURRENT YEAR
Hard Range: R1 INT YEAR to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #15.

Go to BOX DM4.

---

# DM3E            dm5nohelp            R5 DM3E NO MOBIL HELP MTH PLUS

**DISPLAY INSTRUCTIONS:**
If DECEASED flag = 1 (YES), display "of {his/her} life" and "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

If LAST INT MO25 = 1 (YES), display "getting out of bed".
IF LAST INT MO18 = 1 (YES), and DECEASED flag = 1 (YES), display "getting around inside".  Otherwise if LAST INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".
If LAST INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside".  Otherwise if LAST INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "and" between each one.

If STRUCTURE flag = 2 (MULT-UNIT), display "or building" and "leaving {your/his/her} building".

**QUESTION TEXT:**
In the last month {of his/her} life} {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}} {leaving {your/his/her} home/leaving {your/his/her} building}}/{{getting around inside} {going outside}},  and at the time of the last interview in {LAST INT MONTH AND YEAR} {you were/{he/she} was} also getting help like this.

{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}/Since {LAST INT MONTH AND YEAR}}, did {you/he/she} go without help like this for a month or more?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DM4 |
| 90 | LAST INTERVIEW INFORMATION INCORRECT | BOX DM4 |
| | REFUSED | BOX DM4 |
| | DON'T KNOW | BOX DM4 |

---

# DM3F            dm5nohelpmos            R5 DM3F MONTHS OF NO MOBIL HELP
**QUESTION TEXT:**
For about how many months altogether did {you/SP} go without help like this?

**ENTER NUMBER**
Range                                         1 to 24
REFUSED
DON'T KNOW

---

**BOX DM4**                    **BOX DM4**                    NOT ON FILE

> If NEWSAMPLE flag = 1 (YES) and [CANE flag =1 (YES) or WALKER flag =1 (YES) or WHEELCHAIR flag =1 (YES) or SCOOTER flag =1 (YES)], go to DM5.
>
> Else if NEWSAMPLE flag = 1 (YES), go to DM4.
>
> Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to DM6C.
>
> Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag or SCOOTER flag = 1 (YES)], and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)], go to DM6D.
>
> Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to DM6E.
>
> Otherwise, go to DM4.

---

## DM4                    **dm5lstyrcane**                    R5 DM4 IN LST YR USE CANE WALKER

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last year".

If DECEASED flag = 1 (YES), display "Between" and "{LAST INT MONTH AND YEAR}" and "and {MONTH AND YEAR OF DEATH}".

Otherwise if NEWSAMPLE flag <> 1 (YES), display "Since" and "{LAST INT MONTH AND YEAR}.

**QUESTION TEXT:**

> {In the last year/{Between/Since} {LAST INT MONTH AND YEAR} {and {MONTH and YEAR of DEATH}}, did {you/SP} ever use a cane, walker, wheelchair, or scooter?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DM7 |
| | REFUSED | BOX DM7 |
| | DON'T KNOW | BOX DM7 |

---

## BOX DM5                    **BOXDM5**                    NOT ON FILE

> If NEWSAMPLE flag = 1 (YES), go to DM6B.
> Otherwise, go to DM6C.

---

## DM5                    **dm5caneforyr**                    R5 DM5 USD CANE, ETC. YR OR MORE

**DISPLAY INSTRUCTIONS:**

> If CANE flag=1 (YES), display "cane".
> If WALKER flag=1 (YES), display "walker".
> If WHEELCHAIR flag=1 (YES), display "wheelchair".
> If SCOOTER flag=1 (YES), display "scooter".

If more than one mobility device displayed, display "or" between each one.

**QUESTION TEXT:**

> {Have you/Has SP} used a {cane} {walker} {wheelchair} {scooter} for a year or more?
>
> IF NEEDED: {Were you/Was SP} using a {cane} {walker} {wheelchair} {scooter} before {CURRENT MONTH AND YEAR - 1 YEAR}?

**CODES**

| | | |
|---|---|---|
| 1 | YES, A YEAR OR MORE | |
| 2 | NO, LESS THAN A YEAR | DM6B |
| | REFUSED | BOX DM7 |
| | DON'T KNOW | BOX DM7 |

---

## DM6A                    dm5yrsuscane                    R5 DM6A YEARS USING A CANE, ETC

**DISPLAY INSTRUCTIONS:**

> If only one mobility device displayed at DM5, display "that".
> If more than one mobility device displayed at DM5, display "any of these".

**QUESTION TEXT:**

> About how many years {have you/has SP} been using {that/any of these}?
>
> ENTER NUMBER OF YEARS
>
> ENTER 997 IF USING MOBILITY DEVICE SINCE BIRTH/ENTIRE LIFE

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 120 |
| Soft Range | 1 to 50 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

> Hard range: 1-120 or 997.
> Soft range: 1-50.
> Go to BOX DM7

---

## DM6B                    dm5mtfrtcane                    R5 DM6B MTH FST/LST USE CANE ETC

**DISPLAY INSTRUCTIONS:**

> If DM4 = 1 (used device in last year), display "last" and "any of these".
> If DM5 = 2 (used device for less than a year) and only device displayed at DM5, display "first" and "that".
> If DM5 = 2 (used device for less than a year) and more than one device displayed at DM5, display "first" and "any of these".

**QUESTION TEXT:**

> In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} use {that/any of these}?
>
> ENTER MONTH

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | BOX DM7 |
| DON'T KNOW | BOX DM7 |

---

# DM6B1          dm5yrfrtcane          R5 DM6B YEAR FST/LST USE CANE ETC

**DISPLAY INSTRUCTIONS:**

If DM4 = 1 (used device in last year), display "last" and "any of these".
If DM5 = 2 (used device for less than a year) and only device displayed at DM5, display "first" and "that".
If DM5 = 2 (used device for less than a year) and more than one device displayed at DM5, display "first" and "any of these".

Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} use {that/any of these}?

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Range: CURRENT YEAR-1 to CURRENT YEAR
Go to BOX DM7.

---

# DM6C          dm5devstmo          R5 DM6C MONTH DEVICE USE STARTED

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM4 = 1 (YES), do not display first sentence and display "any of these devices".
Otherwise, display question text according to the following directions:
If CURRENT INT CANE flag = 1 (YES), display "a cane".
If CURRENT INT WALKER flag = 1 (YES), display "a walker".
If CURRENT INT WHEELCHAIR flag = 1 (YES), display "a wheelchair".
IF CURRENT INT SCOOTER flag = 1 (YES), display "a scooter".

If more than one device displayed, display "and" between each one and "these devices." Otherwise, if only one device displayed, display "this device".

If more than one device displayed, display "any of these devices". Otherwise, if only one device displayed, display name of device.

Display "first" in bold underlined text.

**QUESTION TEXT:**

{In the last month {of {his/her} life}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter} and at the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} not using {this device/these devices}.}

In what month since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | BOX DM6D |
| DON'T KNOW | BOX DM6D |

**PROGRAMMER INSTRUCTIONS:**
Hard range: 1-12 and 90

If DM6C=90, go to BOX DM7

---

# DM6C1          dm5devstyr          R5 DM6C1 YEAR DEVICE USE STARTED

**QUESTION TEXT:**

[In what month and year since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?]

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Soft Range: CURRENT YEAR-1 to CURRENT YEAR
Hard Range: R1 INT MONTH to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #15.

Go to BOX DM4.

---

# BOX DM6D          BOX DM6D          NOT ON FILE

If [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to BOX DM7.

Otherwise, go to DM6D.

---

# DM6D          dm5devendmo          R5 DM6D MONTH DEVICE USE ENDED

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM4 = 1 (YES), do not display first sentence and display "any of these devices".

Otherwise display question intro according to the following instructions:
If LAST INT CANE flag = 1 (YES), display "a cane".
If LAST INT WALKER flag = 1 (YES), display "a walker".
If LAST INT WHEELCHAIR flag = 1 (YES), display "a wheelchair". If LAST
INT SCOOTER flag = 1 (YES), display "a scooter".

If more than one device displayed, display "and" between each one and "any of these devices".
Otherwise, if only one device displayed, display "this device".

Display "last" in the phrase "last use" in bold underlined text.

Display "MONTH" in underlined text.

**QUESTION TEXT:**

> {At the time of the last interview in {LAST INT MONTH AND YEAR}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter} and in the last month {of {his/her} life}, {you were/SP was} not using {this device/any of these devices}.}
>
> In what month since {LAST INT MONTH AND YEAR} did {you/SP} last use {this device/any of these devices}?

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | BOX DM7 |
| DON'T KNOW | BOX DM7 |

**PROGRAMMER INSTRUCTIONS:**
Hard range: 1-12 and 90

If DM6D=90, go to BOX DM7

---

# DM6D1      dm5devendyr      R5 DM6D1 YEAR DEVICE USE ENDED

**QUESTION TEXT:**

> [In what month and year since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?]
>
> ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Soft Range: CURRENT YEAR-1 to CURRENT YEAR
Hard Range: R1 INT MONTH to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #15.

Go to BOX DM7.

---

# DM6E      dm5nodev      R5 DM6E NO DEVICE MONTH PLUS

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

For both sentences:
If more than one device displayed, display "and" between each one.

First sentence fill:
If CURRENT INT CANE flag = 1 (YES), display "a cane".

If CURRENT INT WALKER flag = 1 (YES), display "a walker".
If CURRENT INT WHEELCHAIR flag = 1 (YES), display a "wheelchair".
If CURRENT INT SCOOTER flag = 1 (YES), display "a scooter".

Second sentence fill:
If LAST INT CANE flag = 1 (YES), display "a cane".
If LAST INT WALKER flag = 1 (YES), display "a walker".
If LAST INT WHEELCHAIR flag = 1 (YES), display "a wheelchair".
If LAST INT SCOOTER flag = 1 (YES), display "a scooter."

**QUESTION TEXT:**

In the last month {of {his/her} life}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter}.  At the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/{he/she} was} using {a cane} {a walker} {a wheelchair} {a scooter}.

Since {LAST INT MONTH AND YEAR}, did {you/SP} go without using any devices for a month or more?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DM7 |
| 90 | LAST INTERVIEW INFORMATION INCORRECT | BOX DM7 |
| | REFUSED | BOX DM7 |
| | DON'T KNOW | BOX DM7 |

---

## DM6F                dm5nodevmos           R5 DM6F MONTHS OF NO DEVICE

**QUESTION TEXT:**

For about how many months altogether did {you/SP} go without using any devices?

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 24 |
| REFUSED | |
| DON'T KNOW | |

---

## BOX DM7              BOX DM7                 NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and {AGE ON PERSON ROSTER} = 65, go to Section DT - Driving and Transportation.
Else if NEWSAMPLE flag = 1 (YES) and DM3A = 997 (HELP ENTIRE LIFE), go to BOX DM9.
Else if NEWSAMPLE flag = 1 (YES) and DM3A = 1-120 and [{AGE ON PERSON ROSTER} – {YEARS FROM DM3A} ≤ 65], go to BOX DM9.
Else if NEWSAMPLE flag = 1 (YES), go to DM7PRE.
Else if DECEASED flag = 1 (YES), go to Section SC - Self-Care Activities.
Otherwise, go to Section DT - Driving and Transportation.

---

## DM7                dm5mobhelp65            R5 DM7 GETTIG HLP W MOBIL AGE 65

**DISPLAY INSTRUCTIONS:**

Display "help" in bold underlined text.

**QUESTION TEXT:**

{Were you/Was SP} getting **help** with getting out of bed, getting around {your/his/her} home or leaving {your/his/her} home around the time when {you/he/she} turned 65?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX DM9 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

**BOX DM8**         **BOXDM8**              NOT ON FILE

If DM2 = 1 (help for a year or more) or 2 (help for less than a year) or DM1 = 1 (help in last year),
go to BOX DM9.
Otherwise, go to DM8.

---

**DM8**              **dm5snc65mohl**        R5 DM8 SINCE 65 EV GET HLP W MOB

**QUESTION TEXT:**

Since {you/SP} turned 65, was there any time when {you/he/she} got help with any of these activities?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX DM9**         **BOXDM9**              NOT ON FILE

If DM6a= 997 (USED DEVICES ENTIRE LIFE), go to Section DT – Driving & Transportation.
Else if DM6A = 1-120 and {AGE on PERSON ROSTER) – {NUMBER OF YEARS from DM6A} ≤ 65, go to Section
DT -- Driving &Transportation.
Otherwise, go to DM9.

---

**DM9**              **dm5at65uscan**        R5 DM9 USE CANE, ETC WHEN TRN 65

**QUESTION TEXT:**

{Were you/Was SP} using a cane, walker, wheelchair, or scooter around the time when {you/he/she} turned 65?

**CODES**

| | | |
|---|---|---|
| 1 | YES | SECTION DT |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

**BOX DM10**        **BOXDM10**             NOT ON FILE

If DM5 = 1 (used device for a year or more) or 2 (used device for less than a year) or DM4 = 1 (used device
in last year), go to Section DT -, Driving and Transportation.
Otherwise, go to DM10.

---

**DM10**             **dm5snc65uscn**        R5 DM10 SINCE TURNED 65 USD CANE

**QUESTION TEXT:**

Since {you/SP} turned 65, was there any time when {you/he/she} used a cane, walker, wheelchair, or scooter to get around?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section DT – Driving and Transportation

---

| Derived Variables from Items in DM Section | |
|---|---|
| **dm5dhlpyr** | R5 D ANY MOBILITY HELP LAST YEAR |
| **dm5dhlpst** | R5 D MTHS MOBILITY HELP STARTED |
| **dm5dhlpend** | R5 D MONTHS MOBILITY HELP ENDED |
| **dm5dhlpyrs** | R5 D YEARS OF MOBILITY HELP |
| **dm5ddeviyr** | R5 D MOB DEVICE USE LAST YR |
| **dm5ddevist** | R5 D MTHS DEVICE USE SINCE START |
| **dm5ddeviend** | R5 D MONTHS DEVICE USE SINCE END |
| **dm5ddeviyrs** | R5 D YEARS OF DEVICE USE |
| **dmds5dintvl** | R5 D MTHS MONTHS BETWEEN LAST INT AND EITHER CURRENT INT OR DATE OF DEATH |
| **dm5dmohlp** | R5 D MONTHS OF MOBILITY HELP |
| **dm5dmodev** | R5 D MONTHS OF MOBILITY DEVICE HELP |
| **dm5dmohlpgr** | R5 D MOBILITY HELP GROUP |
| **dm5dmodevgr** | R5 D MOBILITY DEVICE GROUP |
| **dm5flag** | R5 D SPECIAL CASES DM SECTION ROUTE |

---

**BOX DT1PRE**          **BOX DT1PRE**          NOT ON FILE

If R1 NEVERDROVE flag = 1 (YES) and if DIDN'T LEAVE flag = 1 (YES), go to Section HA - Household Activities.

Otherwise, go to DT1PRE.

---

**DT1PRE**          **DT1PRE**          NOT ON FILE

**QUESTION TEXT:**

The next few questions are about how {you get/SP gets} places.

PRESS 1 AND ENTER TO CONTINUE.

---

**BOX DT1A**          **BOX DT1A**          NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and if DIDN'T LEAVE flag = 1 (YES), go to DT2.
Else if NEWSAMPLE flag = 1 (YES), go to DT1.
Else if R1 NEVER DROVE flag = 1 (YES), go to DT4.
Otherwise, go to DT1A.

---

**DT1A**          **dt5driveyr**          R5 DT1A DRIVE IN LAST YEAR

**QUESTION TEXT:**

Since the time of the last interview in {LAST INT MONTH AND YEAR} did {you/SP}} ever drive {yourself/himself/herself} places?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO/NO LONGER DRIVE | DT4 |
| | REFUSED | DT4 |
| | DON'T KNOW | DT4 |

**PROGRAMMER INSTRUCTIONS:**

If DT1A = 1 (YES), set DROVEINLASTYEAR flag = 1 (YES).

---

**DT1**          **dt5oftedrive**          R5 DT1 HOW OFTEN DRIVE PLACES

**DISPLAY INSTRUCTIONS:**

DISPLAY TEXT "In the last month" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOWCARD DT1

In the last month, how often did {you/SP} drive {yourself/himself/herself} places? Would you say every day, most days, some days, rarely, or never?.

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAY S(5-6 DAYS A WEEK) |
| 3 | SOME DAY S(2-4 DAYS A WEEK) |

| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
If DT1 = 1, 2, 3, or 4, set DRIVES flag = 1 (YES).

---

## BOX DT2      **BOXDT2**      NOT ON FILE

If NEWSAMPLE flag =1 (YES) and DT1= 5 (NEVER), RF, or DK, go to DT2.
Else if NEWSAMPLE flag = 1 (YES), go to BOX DT3PRE.
Else if DT1= 5 (NEVER), RF, or DK, go to DT4.
Otherwise, go to BOX DT3PRE.

---

## DT2      **dt5lastdrove**      R5 DT2 WHEN LAST TIME YOU DROVE

**QUESTION TEXT:**

When was the last time {you/SP} drove?

INDICATE RESPONSE UNIT

**CODES**

| 1 | MONTH AND YEAR | DT2A1 |
| 2 | NUMBER OF MONTHS AGO | DT2B |
| 3 | NUMBER OF YEARS AGO | DT2C |
| 4 | AGE WHEN LAST DROVE | DT2D |
| 7 | NEVER DROVE | BOX DT3PRE |
|   | REFUSED | BOX DT3PRE |
|   | DON'T KNOW | BOX DT3PRE |

---

## DT2A1      **dt5mthltdrov**      R5 DT2A1 MONTH LAST DROVE

**DISPLAY INSTRUCTIONS:**
Display "MONTH" in underlined text.

**QUESTION TEXT:**

ENTER MONTH AND YEAR {SP} LAST DROVE

ENTER MONTH

**ENTER NUMBER**
Range                         1 to 12

**PROGRAMMER INSTRUCTIONS:**
Display month label after month entry.

---

## DT2A2      **dt5yrlsdrov**      R5 DT2A2 YEAR LAST DROVE

**DISPLAY INSTRUCTIONS:**

Display DT2a1 and DT2a2 on the same screen.

Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

> ENTER MONTH AND YEAR {SP} LAST DROVE
>
> ENTER 4-DIGIT YEAR

**ENTER NUMBER**

| | |
|---|---|
| Range | 1910 to 2015 |
| Soft Range | 1930 to 2015 |

**PROGRAMMER INSTRUCTIONS:**

If date formed by DT2a1 and DT2a2 is later than {TODAY'S DATE}, display Error Message #5.

Hard Range is (CURRENT YEAR - 110) to CURRENT YEAR
Soft Range is (CURRENT YEAR - 80) to CURRENT YEAR

Go to Box DT3PRE.

---

## DT2B  **dt5mthagodrv**  R5 DT2B MONTHS AGO LAST DROVE

**DISPLAY INSTRUCTIONS:**

Display "MONTHS" in underlined text.

**QUESTION TEXT:**

> ENTER NUMBER OF MONTHS AGO THAT {SP} last drove

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 24 |

**PROGRAMMER INSTRUCTIONS:**
Go to Box DT3PRE.

---

## DT2C  **dt5yragoldrv**  R5 DT2C HOW MNY YRS AGO LST DROV

**DISPLAY INSTRUCTIONS:**

Display "YEARS" in underlined text.

**QUESTION TEXT:**

> ENTER NUMBER OF YEARS AGO THAT {SP} LAST DROVE

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 95 |
| Soft Range | 1 to 30 |

**PROGRAMMER INSTRUCTIONS:**

If DT2c > SP AGE, display error message "CONFIRM RESPONSE. NUMBER OF YEARS AGO LAST DROVE IS GREATER THAN SP'S CURRENT AGE".

Go to Box DT3PRE.

---

## DT2D  **dt5ageltdrov**  R5 DT2D AGE WHEN LAST DROVE

**DISPLAY INSTRUCTIONS:**

Display "AGE" in underlined text.

**QUESTION TEXT:**

ENTER SP'S AGE WHEN LAST DROVE

**ENTER NUMBER**

| | |
|---|---|
| Range | 14 to 100 |
| Soft Range | 16 to 90 |

**PROGRAMMER INSTRUCTIONS:**

ERROR CHECK: AGE ENTERED AT DT2D SHOULD BE LESS THAN OR EQUAL TO SP AGE on PERSON ROSTER.

---

**BOX DT3PRE**          BOXDT3PRE          NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and ((the difference between TODAY'S DATE and date combination in DT2a1 and DT2a2 is less than or equal to 12 months) OR (number of months in DT2b is less than or equal to 12) or (the difference between SP's current age and the age at DT2d is less than or equal to 1) or DRIVES flag = 1 (YES)), set DROVEINLASTYEAR flag = 1 (YES).

Else if NEWSAMPLE flag = 1 (YES) and DT2 = 7 (NEVER DROVE) set R5 NEVERDROVE flag = 1 (YES).

Else if DIDN'TLEAVE flag = 1 (YES), go to Section HA – HOUSEHOLD ACTIVITIES.
Else if DRIVES flag = 1 (YES), go to DT3PRE.
Otherwise, go to DT4.

---

**DT3PRE**          DT4PRE          NOT ON FILE

**QUESTION TEXT:**

Now I have some questions about driving situations people sometimes avoid

PRESS 1 AND ENTER TO CONTINUE.

---

**DT3**          dt5avoidriv1          R5 DT3A AVOID DRIVING AT NIGHT

          dt5avoidriv2          R5 DT3B AVOID DRIVING ALONE

          dt5avoidriv3          R5 DT3C AVOID DRIVING HIGHWAYS

          dt5avoidriv4          R5 DT3D AVOID DRIVING BAD WEATHR

**DISPLAY INSTRUCTIONS:**

If at DT3a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display response option 7. NO RAIN OR BAD WEATHER for DT3D only.

Use "Same Question Stem" display

**QUESTION TEXT:**

{[}In the last month, did {you/SP} ever avoid driving{]}

{variable text [a-d]}

RESPONSE 1[a] at night?
RESPONSE 2[b] alone?
RESPONSE 3[c] on busy roads or highways?
RESPONSE 4[d] in the rain or other bad weather?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| 7 | NO, NO RAIN OR BAD WEATHER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.

Display 'variable text' in the a-d sequence until all rows have been displayed.

---

**DT4**

| | | |
|---|---|---|
| | **dt5getoplcs1** | R5 DT4A SP WALKED GOT PLACES |
| | **dt5getoplcs2** | R5 DT4B GOT RIDE FAM FRIEND PD |
| | **dt5getoplcs3** | R5 DT4C VANSHUTTLE PROV BY PLACE |
| | **dt5getoplcs4** | R5 DT4D VAN SHUTTLE FOR SENIORS |
| | **dt5getoplcs5** | R5 DT4E SP TOOK PUBLIC TRANSPRT |
| | **dt5getoplcs6** | R5 DT4F SP TOOK TAXI GOT PLACES |
| | **dt5getoplcs7** | R5 DT4G GOT PLACES OTHR SPECIFY |

**DISPLAY INSTRUCTIONS:**

If at DT4a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display "else" if DRIVES flag =1 (YES).
For variable text [a], if WHEELCHAIR flag = 1 (YES) or SCOOTER flag = 1 (YES), display "or use {your/his/her}".
If WHEELCHAIR flag = 1 (YES), display "wheelchair".
If SCOOTER flag = 1 (YES), display "scooter".
If WHEELCHAIR flag =1 (YES) and SCOOTER flag = 1 (YES), display "wheelchair or scooter".

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1(YES), display item c and for variable text [d] display, "not provided by the place {you live/{he/she} lives}"

**QUESTION TEXT:**

{[}In the last month, how {else} did {you/SP} get to places outside {your/his/her} {home/building}? Did {you/he/she}{]}

{variable text [a-g]}

RESPONSE 1 [a] walk {or use {your/his/her}} {wheelchair/ scooter/ wheelchair or scooter}?
RESPONSE 2 [b] get a ride from a family member, friend, or someone paid to help?
{RESPONSE 3 [c] use a van or shuttle service provided by the place {you live/{he/she} lives}?}
RESPONSE 4 [d] use a van or shuttle service for seniors or people with disabilities {not provided by the place {you live/{he/she} lives}}?
RESPONSE 5 [e] take public transportation (the bus, subway, or train)?
RESPONSE 6 [f] take a taxi?
RESPONSE 7 [g] use any other way to get places?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.

Display 'variable text' in the a-d sequence until all rows have been displayed.
If DT4g = 1 (YES OTHER WAYS), go to DT4H.

Otherwise, go to BOX DT5A.

---

## DT4H  DT4H  NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER WAY OF GETTING AROUND

**ENTER TEXT**

Length                          25

---

## BOX DT5A  BOX DT5A  NOT ON FILE

If DT4b = 1 (YES, RIDE FROM FAMILY, FRIEND, OR SOMEONE PAID TO HELP), go to DT5A.
Otherwise, go to Section HA - Household Activities.-

---

## DT5A  op5tkplhlp1  R5 DT5A TAKES SP PLACES MOST
##      op5relatnshp  R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.  Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

In the last month, which family member, friend, or someone paid to help took {you/SP} places most often?


IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

DT5b.   [What is (his/her) first name?]    CONFIRM SPELLING

DT5c.   [What is (his/her) last name?]    CONFIRM SPELLING

DT5d.   [What is (his/her) relationship to {you/SP}?]    PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |

| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For roster selection/addition at DT5A, set TOOK PLACES MOST OFTEN flag = 1 (yes).

Allow only one person to be selected/added to the roster for DT5A.

---

**DT6**             **dt5otfrfamtk**             R5 DT6 ANTH FND FAM MEM TOOK YOU

**QUESTION TEXT:**
Was there another friend or family member who took {you/SP} places in the last month?

**CODES**
| 1 | YES | |
| 2 | NO | Section HA |
| | REFUSED | Section HA |
| | DON'T KNOW | Section HA |

---

**DT7A**             **op5tkplhlp2**             R5 DT7A TAKES SP PLACES OTH

                    **op5relatnshp**             R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.  Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who was that (friend or family member who took {you/SP} places in the last month)?

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

DT7b.   [What is (his/her) first name?]   CONFIRM SPELLING

DT7c.   [What is (his/her) last name?]   CONFIRM SPELLING

DT7d.   [What is (his/her) relationship to {you/SP}?]   PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |

| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

Allow one roster selection/addition.  Set TOOK PLACES flag = 1 (YES) for selection/addition.
Do not allow person selected/added at DT5A to be selected at DT7A.

If selection of person with TOOK PLACES MOST OFTEN flag=1(YES), display message "PERSON ALREADY SELECTED FOR TAKING SP PLACES MOST OFTEN.  SELECT/ADD A DIFFERENT PERSON ON ROSTER"

Go to Section HA - Household Activities

---

## Flag Variables Set in DT Section

| | |
|---|---|
| **fl5dneverdrv** | R5 F DT SP NEVER DROVE |
| **fl5drives** | R5 F DT SP DRIVES CAR |
| **fl5drvlstyr** | R5 F DT SP DROVE CAR IN PAST YR |

---

## HA1PRE                     HA1PRE                          NOT ON FILE

**QUESTION TEXT:**

> Next I have a few questions about chores around {your/SP's} {home/apartment/ room/unit/suite/other} and how they got done in the last month.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## HA1                        ha5laun                         R5 HA1 HOW LAUNDRY GOT DONE

**DISPLAY INSTRUCTIONS:**

> Display HA1, HA1A, HA2, HA2A on same screen.
> Display "in the last month" in bold underlined text.
>
> If PROXY flag is null, display "1a".
> If PROXY flag = 1 (yes), display "1b".

**QUESTION TEXT:**

> SHOW CARD HA{1a/1b}
>
> Let's start with {your/SP's} laundry. By laundry we mean cleaning {your/{his/her}} clothing, sheets, and towels.
>
> Which answer best describes how {your/SP's) laundry got done in the last month? Did {you/{he/she}} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

**CODES**

| | | |
|---|---|---|
| 1 | ALWAYS DID IT BY SELF | HA2 |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | HA2 |
| 3 | SOMEONE ELSE ALWAYS DID IT | HA3A |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | HA4 |
| | REFUSED | HA5 |
| | DON'T KNOW | HA5 |

---

## HA1A                       ha5launslf                      R5 HA1A DO LAUNDRY YOURSELF

**DISPLAY INSTRUCTIONS:**

> Display "by {yourself/himself/herself}" in bold underlined text

**QUESTION TEXT:**

> In the last month, did {you/SP} ever do {your/{his/her}} laundry by {yourself/himself/herself}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## HA2

| | |
|---|---|
| **ha5whrmachi1** | R5 HA2 WASH MACHINE IN HOME |
| **ha5whrmachi2** | R5 HA2 WASH MACHIN IN BUILDING |
| **ha5whrmachi3** | R5 HA2 WASH MACHIN LAUNDROMAT |
| **ha5whrmachi4** | R5 HA2 WASH MACHIN SINK IN HOME |
| **ha5whrmachi5** | R5 HA2 WASH MACH SINK IN BUILDNG |
| **ha5whrmachi6** | R5 HA2 WASH MACHIN OTHR SPECIFY |

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display "or building".
If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display responses 2 and 5.

**QUESTION TEXT:**

In the last month, when {you/SP} did {your/{his/her}} laundry, where did {you/{he/she}} do that? Did {you/{he/she}} use a machine in {your/{his/her}} home {or building}, at a Laundromat, or what?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | MACHINE IN HOME | BOX HA3A |
| 2 | {MACHINE ELSEWHERE IN BUILDING} | BOX HA3A |
| 3 | LAUNDROMAT | BOX HA3A |
| 4 | SINK IN HOME | BOX HA3A |
| 5 | {SINK ELSEWHERE IN BUILDING} | BOX HA3A |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | BOX HA3A |
| | DON'T KNOW | BOX HA3A |

## HA2A

| | |
|---|---|
| HA2A | NOT ON FILE |

**QUESTION TEXT:**

SPECIFY WHERE {SP} DID LAUNDRY.

**ENTER TEXT**

| | |
|---|---|
| Length | 50 |

## BOX HA3A

| | |
|---|---|
| BOX HA3A | NOT ON FILE |

If HA1 = 1 (always by self), go to HA5.
Otherwise, go to HA3a.

## HA3A

| | |
|---|---|
| **op5launhlp** | R5 HA3A HELPS SP WITH LAUNDRY |
| **op5relatnshp** | R5 RELASHIP TO SP UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} lives}."

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME,

LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA1 = 2 (always with someone else) display "when {you/SP} did {your/{his/her}} laundry, who did that with {you/him/her}".

If HA1 = 3 (someone else always did), display "who did {your/SP's} laundry for {you/{him/her}}".

If HA1 = 4 (varied) display "who did {your/SP's} laundry with {you/{him/her}} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

> In the last month, {when {you/SP} did {your/{his/her}} laundry, who did that with {you/{him/her}}/who did {your/SP's} laundry for {you/{him/her}}/who did {your/SP's} laundry with {you/{him/her}} or for {you/{him/her}}}?
>
> IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.
>
> PROBE: Anyone else?
>
> SELECT ALL THAT APPLY
>
> IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON
>
> HA3b.  [What is (his/her) first name?]    CONFIRM SPELLING
> HA3c.  [What is (his/her) last name?]    CONFIRM SPELLING
> HA3d.  [What is (his/her) relationship to {you/SP}?]    PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |

| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA3, set HELPEDWITHLAUNDRY flag = 1 (yes).

---

**BOX HA4**         **BOX HA4**         NOT ON FILE

> If HA1 = 2 (always with someone else) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to HA6.
>
> If HA1 = 3 (someone else always did) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA7.
>
> If HA1 = 4 (varied) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA5.
>
> Otherwise go to HA4.

---

**HA4**         **ha5dlaunreas**         R5 D LAUNDRY REASN WITH BY OTHER

**DISPLAY INSTRUCTIONS:**
If HA1 = 2 (always with someone else), display "with".
If HA1 = 3 (someone else always did), display "for".
If HA1 = 4 (varied), display "with or for".
If HA1 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.
Display responses in two side-by-side columns, with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers.

**QUESTION TEXT:**

> {What is the reason someone else did {your/SP's} laundry {with/for/with or for} {you/{him/her}}?} Was that because of {your/SP's} health or functioning or some other reason?
>
> SELECT ALL THAT APPLY

**CODES**

| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, |

ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE
TO DO IT
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
If HA4 = (HEALTH OR FUNCTIONING), set, HELATHREASONHELPWITHLAUNDRY flag = 1 (yes).

---

| **BOX HA5** | **BOX HA5** | NOT ON FILE |
|---|---|---|

If HA1a = 1 (yes by self), go to HA5.
If HA1 = 2 (always with someone else) or HA1a ≠ 1 (didn't do by self), go to HA6.

[If HA1 = 3 (someone else always did) or HA1 = 5 (not done in last month)] and
HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes), go to BOX HA7.

Otherwise, go to HA20PRE.

---

| **HA5** | **ha5laundif** | R5 HA5 DIFF DOING LAUNDRY BY SELF |
|---|---|---|

**DISPLAY INSTRUCTIONS:**
Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**
In the last month, how much difficulty did {you/SP} have doing laundry by {yourself/himself/herself}.
Would you say none, a little, some, or a lot?

**CODES**
| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

| **HA6** | **ha5launoft** | R5 HA6 HOW OFTEN DO LAUNDRY |
|---|---|---|

**DISPLAY INSTRUCTIONS:**
Display "a year ago" in bold underlined text.

**QUESTION TEXT:**
Compared to a year ago, {do you/does SP} do {your/{his/her}} laundry more often, less often, or about
the same?

**CODES**
| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX HA7** | **BOX HA7** | NOT ON FILE |
|---|---|---|

If [HA1 = 1 (always by self) or HA1 = 4 (varied)] and [HA5 = 2 (a little difficulty) or HA5 = 3 (some difficulty) or HA5 = 4 (a lot of difficulty)], go to HA7.

If [HA1 = 2 (always with someone else) or HA1 = 3 (someone else always did) or HA1 = 4 (varied) or HA1 = 5 (not done in last month)] and [HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes) or HELPEDWITHLAUNDRY flag =1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA7.

Otherwise, go to HA20PRE

---

## HA7    ha5launwout    R5 HA7 EVER GO WOUT CLEAN LAUNDR

**DISPLAY INSTRUCTIONS:**

If HA1= 1 (always did by self) or 5 (not done in last month) or HA1a = 1 (yes by self), display "it was too difficult to do by {yourself/himself/herself}".

Otherwise, display "no one was there to help or do that for {you/{him/her}}".

Display "in the last month" in underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without clean laundry because {it was too difficult to do by {yourself/himself/herself} / no one was there to help or do that for {you/him/her}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HA20PRE    HA20PRE    NOT ON FILE

**QUESTION TEXT:**

The next few questions are about shopping for groceries or personal items.

IF NEEDED:  By personal items, we mean things like toiletries that you can buy at the grocery or drug store.

PRESS 1 AND ENTER TO CONTINUE

---

## HA20    ha5shop    R5 HA20 HOW YOUR SHOPPING DONE

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null, display "1a".
If PROXY flag = 1 (yes), display "1b".

Display "in the last month" in bold underlined text.

**QUESTION TEXT:**

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} shopping got done in the last month? Did {you/{he/she}} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

| | | |
|---|---|---|
| 1 | ALWAYS DID IT BY SELF | HA22 |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | HA22 |
| 3 | SOMEONE ELSE ALWAYS DID IT | HA25A |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | HA26 |
| | REFUSED | HA27 |
| | DON'T KNOW | HA27 |

---

## HA20A          ha5shopslf          R5 HA20A EVER SHOP BY YOURSELF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever do {your/{his/her}} shopping by {yourself/himself/herself}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HA22

| | | |
|---|---|---|
| | ha5howpaygr1 | R5 HA22 PAY GROC PERS ITMS CASH |
| | ha5howpaygr2 | R5 HA22 PAY GROC PERS ITMS CHCK |
| | ha5howpaygr3 | R5 HA22 PAY GROC PERS ITMS DEBIT |
| | ha5howpaygr4 | R5 HA22 PAY GROC PERS CREDIT |
| | ha5howpaygr5 | R5 HA22 PAY GROC PERS FOOD STMP |
| | ha5howpaygr6 | R5 HA22 PAY GROC PERS SMON ELS |
| | ha5howpaygr7 | R5 HA22 PAY GROC PERS OTHR SPEC |

**QUESTION TEXT:**

SHOW CARD HA2

In the last month, when {you/SP} shopped for groceries or other personal items, did {you/{he/she}} pay for them with cash, check, debit card, credit card, or some other way?

SELECT ALL THAT APPLY

**CODES          CODE ALL THAT APPLY**

| | |
|---|---|
| 1 | CASH |
| 2 | CHECK |
| 3 | DEBIT OR GIFT CARD |
| 4 | CREDIT CARD |
| 5 | FOOD STAMPS |
| 6 | SOMEONE ELSE PAYS |
| 91 | OTHER |
| | REFUSED |
| | DON'T KNOW |

**HA23**

| | | |
|---|---|---|
| **ha5howgtstr1** | R5 HA23 DROVE TO THE STORE |
| **ha5howgtstr2** | R5 HA23 FAM FRND PD HLP DROVE |
| **ha5howgtstr3** | R5 HA23 VAN PLACE SP LIVES DROVE |
| **ha5howgtstr4** | R5 HA23 VAN 4 DIS SENIORS DROVE |
| **ha5howgtstr5** | R5 HA23 PUBLIC TRANSPORT TO STORE |
| **ha5howgtstr6** | R5 HA23 SP TOOK TAXI 2 THE STORE |
| **ha5howgtstr7** | R5 HA23 SP WALKED TO STORE |
| **ha5howgtstr8** | R5 HA23 OTHR SPECIFY TO STORE |

**DISPLAY INSTRUCTIONS:**

If DT1 = 1 (drives every day), 2 (drives most days), 3 (drives some days) or 4 (rarely) OR DROVEINLASTYEAR flag = 1 (yes), display "drive," and response 1.

If FACILITY flag = 1 (yes), display "use a service provided by the place where {you live/{he/she} lives},".

If FACILITY flag = 1 (yes) or RETIREMENTCOMMUNITY flag = 1 (YES), display response 3 and for response 4, "not provided by the place SP lives".

DISPLAY "In the last year" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD HA3

In the last year, how did {you/SP} get to the store to shop for groceries or personal items? Did {you/{he/she}} {drive,} get a ride from a family member or friend, {use a service provided by the place where {you live/{he/she} lives},} or what?

SELECT ALL THAT APPLY

| CODES | CODE ALL THAT APPLY | |
|---|---|---|
| 1 | {DROVE} | HA24A |
| 2 | GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP | HA24A |
| 3 | {USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LKIVES} | HA24A |
| 4 | {USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {(NOT PROVIDED BY THE PLACE SP LIVES)} | HA24A |
| 5 | TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM) | HA24A |
| 6 | TOOK A TAXI | HA24A |
| 7 | WALKED | HA24A |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | HA24A |
| | DON'T KNOW | HA24A |

---

**HA23A**       **HA23A**                    NOT ON FILE

**QUESTION TEXT:**

**ENTER TEXT**

Length                                            50

---

## HA24A                    **ha5shopcart**               R5 HA24B EVER USE MOTORIZED CART

**DISPLAY INSTRUCTIONS:**

Display "in the last month" in bold underlined text.

**QUESTION TEXT:**

In the last month, when {you/SP} went to the store to shop did {you/{he/she}} ever use a motorized cart?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HA24B                    **ha5shoplean**               R5 HA24B EVER LEAN ON SHOP CART

**DISPLAY INSTRUCTIONS:**

Display "in the last month" in bold underlined text.

**QUESTION TEXT:**

In the last month, when {you/SP} went to the store to shop did {you/{he/she}} ever lean on the shopping cart to help {you/{him/her}} get around the store?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX HA25A              **BOX HA25A**                NOT ON FILE

If HA20 = 1 (always by self) go to HA27.
Otherwise, go to HA25A.

---

## HA25A                    **op5shophlp**                R5 HA25A HELPS SP WITH SHOPPING

                                **op5relatnshp**             R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} lives}."

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA20 = 2 (always with someone else), display "when {you/SP} shopped for groceries or personal items, who did that with {you/{him/her}}".

If HA20 = 3 (someone else always did), display "who shopped for groceries or personal items for {you/SP}".

If HA20 = 4 (varied), display "who shopped for groceries or personal items with {you/SP} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

In the last month, {when {you/SP} shopped for groceries or personal items, who did that with {you/{him/her}} / who shopped for groceries or personal items for {you/SP} /who shopped for groceries or personal items with {you/SP} or for you/{him/her}}}?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else? SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA25b.   [What is (his/her) first name?]   CONFIRM SPELLING
HA25c.   [What is (his/her) last name?]   CONFIRM SPELLING
HA25d.   [What is (his/her) relationship to {you/SP}?]   PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |

| | |
|---|---|
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA25, set HELPEDWITHSHOPPING flag = 1 (yes).

---

**BOX HA26**                    **BOX HA26**                    NOT ON FILE

> If HA20 = 2 (always with someone else) and HELPEDWITHSHOPPING flag = 1 (YES) for
> SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA28.
>
> If HA20 = 3 (someone else always did) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE
> FROM PLACE SP LIVES, go to BOX HA29.
>
> If HA20 = 4 (varied) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP
> LIVES, go to BOX HA27.
>
> Otherwise go to HA26

---

**HA26**                    **ha5dshopreas**                    R5 D SHOP REASN WITH BY OTHERS

**DISPLAY INSTRUCTIONS:**

If HA20 = 2 (always with someone else), display "with". If
HA20 = 3 (someone else always did), display "for".
If HA20 = 4 (varied), display "with or for".
If HA20 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.
Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as
the column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the
corresponding column headers.

**QUESTION TEXT:**

> {What is the reason someone else shopped for groceries or personal items {with/for/with or for}
> {you/SP}?} Was that because of {your/SP's} health or functioning or some other reason?
>
> SELECT ALL THAT APPLY

| CODES | Code All That Apply |
|---|---|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERRY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT |
| | REFUSED                                        BOX HA27 |

**PROGRAMMER INSTRUCTIONS:**

If HA26 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITH SHOPPING flag = 1 (yes).

---

**BOX HA27**          **BOX HA27**          NOT ON FILE

If HA20a = 1 (yes by self), go to HA27.
If HA20 = 2 (always with someone else) or HA20a ≠ 1 (didn't do by self), go to HA28.

If [HA20 = 3 (someone else always did) or HA20 = 5 (not done in last month)] and HEALTHREASONHELPWITHSHOPPING flag =1 (yes), go to BOX HA29.

Otherwise, go to HA30PRE.

---

**HA27**               **ha5shopdif**               R5 HA27 DIFF SHOPPING BY SELF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, how much difficulty did {you/SP} have shopping for groceries or personal items by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

**HA28**               **ha5shopoft**               R5 HA28 HOW OFT SHOP GROCERIES

**DISPLAY INSTRUCTIONS:**

Display "a year ago" in bold underlined text.

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} shop for groceries or personal items more often, less often, or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

**BOX HA29**          **BOX HA29**          NOT ON FILE

If [HA20 = 1 (always by self) or HA20 = 4 (varied)] and [HA27 = 2 (a little) or HA27 = 3 (some) or HA27 = 4 (a lot)], go to HA29.

If [HA20 = 2 (always with someone else) or HA20 = 3 (some else always did) or HA20 = 4 (varied) or HA20 = 5 (not done in last month)] and [HEALTHREASONHELPWITHSHOPPING flag = 1 (yes) or

HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMONE FROM PLACE SP LIVES, go to HA29.

Otherwise go to HA30PRE.

---

**HA29**                    **ha5shopwout**                    R5 HA29 EVER GO WITHOUT GROCERIES

**DISPLAY INSTRUCTIONS:**

If HA20=1 (always by self) or 5 (not done in last month), or HA20a = 1 (yes by self), display "it was too difficult to shop by {yourself/himself/herself}".

If HA20=2 (always with someone else) or 3 (someone else always did), display "no one was there to help or shop for {you/{him/her}}"?

Display "in the last month" in underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without groceries or personal items because {it was too difficult to shop by {yourself/himself/herself} / no one was there to help or shop for {you/{him/her}}}?

**CODES**

| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**HA30PRE**                    **HA30PRE**                    NOT ON FILE

**QUESTION TEXT:**

Now let's turn to making hot meals.

PRESS 1 AND ENTER TO CONTINUE

---

**HA30**                    **ha5meal**                    R5 HA30 HOW HOT MEALS GET MADE

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null, display "1a".
If PROXY flag = 1 (yes), display "1b".

Display "in the last month" in bold underlined text.

**QUESTION TEXT:**

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} hot meals got made in the last month? Did {you/{he/she}} always make them by {yourself/himself/herself}, always make them together with someone else, did someone else always make them for {you/{her/him}}, or did it vary?

**CODES**

| 1 | ALWAYS DID IT BY SELF | HA30B |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | HA30B |
| 3 | SOMEONE ELSE ALWAYS DID IT | HA30B |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | HA33 |
| | REFUSED | HA34 |
| | DON'T KNOW | HA34 |

## HA30A      **ha5mealslf**      R5 HA30A MAKE HOT MEALS YOURSELF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever make {your/{his/her}} hot meals by {yourself/himself/herself}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## HA30B      **ha5restamels**      R5 HA30B OFTN HAV RESTARNT MEALS

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 (yes), display "Do not include meals provided as a service by the place {you live/{he/she} lives}."

**QUESTION TEXT:**

SHOW CARD HA4

In the last month, when {you/SP} had hot meals, how often were they restaurant meals, including eat-in, take- out, or delivered meals? {Do not include meals provided as a service by the place {you live/{he/she} lives}.} Was it every time {you/{he/she}} had a hot meal, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

## HA30C      **ha5mealwheel**      R5 HA30C OFTN GET MEALS ON WHEEL

**QUESTION TEXT:**

SHOW CARD HA4

In the last month, when {you/SP} had hot meals, how often were they from Meals on Wheels or other food assistance programs? Was it every time {you/{he/she}} had a hot meal, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

## BOX HA31

**BOX HA31**          NOT ON FILE

> If HA30 = 3 (SOMEONE ELSE ALWAYS DID IT), go to HA32A.
> Else if HA14 = 1 (has microwave), go to HA31.
> Otherwise, go to BOX HA32A.

## HA31

**ha5oftmrcrow**          R5 HA31 OFTEN USE THE MICROWAVE

**QUESTION TEXT:**

> SHOW CARD HA4
>
> In the last month, when {you/SP} made hot meals did {you/{he/she}} use the microwave oven every time, most times, sometimes, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

## BOX HA32A

**BOX HA3A**          NOT ON FILE

> If HA30 = 1 (always did by self) go to HA34.
> Otherwise, go to HA32A.

## HA32A

**op5mealhlp**          R5 HA32A HELPS SP WITH MEALS

**op5relatnshp**          R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSIHP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} lives}."

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display RESTAURANT/TAKE OUT SERVICES and MEALS ON WHEELS on the person roster.

If HA30 = 2 (always with someone else), display "when {you/SP} made hot meals, who did that with {you/{him/her}}".

If HA30 = 3 (someone else always did), display "who made hot meals for {you/SP}".

If HA30 = 4 (varied), display "who made hot meals with {you/SP} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

> In the last month, {when {you/SP} made hot meals, who did that with {you/{him/her}} / who made hot meals for {you/SP} /who made hot meals with {you/SP} or for {you/{him/her}}}?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.
PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA32b.   [What is (his/her) first name?]    CONFIRM SPELLING
HA32c.   [What is (his/her) last name?]    CONFIRM SPELLING
HA32d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA25, set HELPEDWITHMEALS flag = 1 (yes).

**BOX HA33**  BOX HA33  NOT ON FILE

If HA30 = 2 (always with someone else) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA35.

If HA30 = 3 (someone else always did) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA36.

If HA30 = 4 (varied) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA34.

Otherwise go to HA33

**HA33**  ha5dmealreas  R5 D MEALS REASN WITH BY OTHERS

**DISPLAY INSTRUCTIONS:**
If HA30 = 2 (always with someone else), display "with".
If HA30 = 3 (someone else always did), display "for".
If HA30 = 4 (varied), display "with or for".
If HA30 = 5 (none made in last month), do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below the corresponding column headers.

**QUESTION TEXT:**
{What is the reason someone else made hot meals {with/for/with or for} {you/SP}?} Was that because of {your/SP's} health or functioning or some other reason?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERRY, UNABLE TO DRIVE | |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT | |
| | REFUSED | BOX HA34 |
| | DON'T KNOW | BOX HA34 |

**PROGRAMMER INSTRUCTIONS:**
If HA33 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHMEALS flag = 1 (yes).

**BOX HA34**  BOX HA34  NOT ON FILE

If HA30a = 1 (yes by self), go to HA34.
If HA30 = 2 (always with someone else) or HA30a ≠ 1 (didn't do by self), go to HA35.

If [HA30 = 3 (someone else always did) or HA30 = 5 (not done in last month)] and
HEALTHREASONHELPWITHMEALS flag = 1 (yes), go to BOX HA36.

Otherwise, go to HA40PRE.

---

**HA34**  ha5dmealdif                    R5 HA34 DIFICULTY MAK MEALS SELF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, how much difficulty did {you/SP} have shopping for groceries or personal items by
{yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

**HA35**  ha5mealoft                    R5 HA35 HOW OFTEN MAKE HOT MEALS

**DISPLAY INSTRUCTIONS:**

Display "a year ago" in bold underlined text.

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} make hot meals more often, less often, or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

**BOX HA36**  BOX HA36                    NOT ON FILE

If [HA30 = 1 (always by self) or HA30 = 4 (varied)] and [HA34 = 2 (a little) or HA34 = 3 (some) or HA34 = 4
(a lot)], go to HA36.

If [HA30 = 2 (always with someone else) or HA30 = 3 (some else always did) or HA30 = 4 (varied) or HA30
= 5 (not done in last month)] and [HEALTHREASONHELPWITHMEALS flag = 1 (yes) or
HELPEDWITHMEALS flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES] go to HA36.

Otherwise go to HA40PRE.

---

**HA36**  ha5mealwout                    R5 HA36 EVER GO WITHOUT HOT MEAL

**DISPLAY INSTRUCTIONS:**

If HA30 =1 (always by self) or 5 (not done in last month) or HA30a = 1 (yes by self), display "it was too difficult to make one by {yourself/himself/herself}".

If HA30 =2 (always with someone else) or 3 (someone else always did), display "no one was there to help or make one for {you/{him/her}}"?

Display "in the last month" in underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without a hot meal because {it was too difficult to make one by {yourself/himself/herself} / no one was there to help or make one for {you/him/her}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HA40PRE             HA40PRE                    NOT ON FILE

**QUESTION TEXT:**

Now I have a few questions about everyday money matters like handling bills and banking.

IF NEEDED: By handling bills, we mean writing checks, sending money orders or paying with cash. By banking we mean checking balances, and making transfers, deposits or withdrawals from the bank or ATM.

PRESS 1 AND ENTER TO CONTINUE

---

## HA40             ha5bank                    R5 HA40 HOW BILLS BANKIN HANDLED

**DISPLAY INSTRUCTIONS:**

Display "in the last month" in bold underlined text.

If PROXY flag is null, display "1a".
If PROXY flag = 1 (yes), display "1b".

**QUESTION TEXT:**

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} bills and banking were handled in the last month? Did {you/{he/she}} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

**CODES**

| | | |
|---|---|---|
| 1 | ALWAYS DID IT BY SELF | HA44 |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | HA42A |
| 3 | SOMEONE ELSE ALWAYS DID IT | HA42A |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | HA43 |
| | REFUSED | HA44 |
| | DON'T KNOW | HA44 |

---

## HA40A             ha5bankslf                    R5 HA40A HNDL BILLS BNKING YRSLF

**DISPLAY INSTRUCTIONS:**

 Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

 In the last month, did {you/SP} ever handle {your/{his/her}} bills and banking by {yourself/himself/herself}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# HA42A

| | | |
|---|---|---|
| | **op5bankhlp** | R5 HA42A HELPS SP WITH BANKING |
| | **op5relatnshp** | R5 RELASHIP TO SP UPDATE AND NEW |

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} lives}."

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag =YES(yes), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA40 = 2 (always with someone else), display "when {you/SP} handled bills and banking, who did that with {you/{him/her}}".

If HA40 = 3 (someone else always did), display "who handled bills and banking for {you/SP}".

If HA40 = 4 (varied), display "who handled bills and banking with {you/SP} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

In the last month, {when {you/SP} handled bills and banking, who did that with {you/{him/her}}/ who handled bills and banking for {you/SP} /who handled bills and banking with {you/SP} or for {you/{him/her}}}?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA42b. [What is (his/her) first name?] CONFIRM SPELLING
HA42c. [What is (his/her) last name?] CONFIRM SPELLING
HA42d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |

| | |
|---|---|
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA25, set HELPEDWITHBANKING flag = 1 (yes).

---

**BOX HA43**          **BOX HA43**                    NOT ON FILE

If HA40 = 2 (always with someone else) HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA45.

If HA40 = 3 (someone else always did) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA46.

If HA40 = 4 (varied) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA44.

Otherwise go to HA43.

---

**HA43**          **ha5dbankreas**          R5 D BANK BILL REASON WITHBY OTH

**DISPLAY INSTRUCTIONS:**

If HA40 = 2 (always with someone else), display "with".
If HA40 = 3 (someone else always did), display "for".
If HA40 = 4 (varied), display "with or for".
If HA40 = 5 (not done in last month) do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below the corresponding column headers.

**QUESTION TEXT:**

{What is the reason someone else handled bills and banking {with/for/with or for} {you/{him/her}}?} Was that because of {your/{his/her}} health or functioning or some other reason?

SELECT ALL THAT APPLY

| CODES | Code All That Apply |
|---|---|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERRY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT |
| | REFUSED                 BOX HA44 |
| | DON'T KNOW          BOX HA44 |

**PROGRAMMER INSTRUCTIONS:**

If HA43 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHBANKING flag = 1 (yes).

---

**BOX HA44**        **BOX HA44**                NOT ON FILE

If HA40a = 1 (yes by self), go to HA44.
If HA40 = 2 (always with someone else) or HA40a ≠ 1 (didn't do by self), go to HA45.

If [HA40 = 3 (someone else always did) or HA40 = 5 (not done in last month)] and HEALTHREASONHELPWITHBANKING flag =1 (yes), go to BOX HA46.

Otherwise, go to HA50PRE.

---

**HA44**           **ha5bankdif**           R5 HA44 DIF HNDL BLLS BNKING SLF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, how much difficulty did {you/SP} have handling {your/his/her} bills and banking by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |

DON'T KNOW

---

**HA45**        **ha5bankoft**        R5 HA45 HOW OFTEN YOU PAY BILLS

**DISPLAY INSTRUCTIONS:**

Display "a year ago" in bold underlined text.

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} handle {your/his/her} own bills and banking more often, less often, or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

**BOX HA46**        **BOX HA46**        NOT ON FILE

If [HA40 = 1 (always by self) or HA40 = 4 (varied)] and [HA44 = 2 (a little) or HA44 = 3 (some) or HA44 = 4 (a lot)], go to HA46.

If [HA40 = 2 (always with someone else) or HA40 = 3 (some else always did) or HA40 = 4 (varied) or HA40 = 5 (not done in last month)] and [HEALTHREASONHELPWITHBANKING flag = 1 (yes) or HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA46.

Otherwise go to HA50PRE.

---

**HA46**        **ha5bankwout**        R5 HA46 EVER GO WOUT PAYIN BILLS

**DISPLAY INSTRUCTIONS:**

If HA40=1 (always by self) or 5 (not done in last month) or HA40a = 1 (yes by self), display "it was too difficult to do that by {yourself/himself/herself}".

If HA40=2 (always with someone else) or 3 (someone else always did), display "no one was there to help or do that for {you/{him/her}}".

Display "in the last month" in underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without handling {your/his/her} bills and banking matters because {it was too difficult to do that by {yourself/himself/herself} / no one was there to help or do that for {you/{him/her}}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**HA50PRE**        **HA50PRE**        NOT ON FILE

**QUESTION TEXT:**

Now let's turn to less common money matters, such as opening, closing or cashing in CDs, checking, money market or retirement accounts or applying for loans.

PRESS 1 AND ENTER TO CONTINUE

---

**HA50**                    **ha5money**                    R5 HA50 MONEY MATTERS TO HANDLE

**DISPLAY INSTRUCTIONS:**

Display "in the last year" in underlined text.

**QUESTION TEXT:**

In the last year, did {you/SP} have money matters like these that needed to be handled?

IF NEEDED: Money matters include opening, closing or cashing in CDs, checking, money market or retirement accounts, or applying for loans.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION SC |
| | REFUSED | SECTION SC |
| | DON'T KNOW | SECTION SC |

---

**HA51**                    **ha5moneyhlp**                 R5 HA51 ANYONE HLP W MONY MATTRS

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 (yes), display "a service provided by the place where {you live/SP lives},"

Display "in the last year" in bold underlined text.

**QUESTION TEXT:**

In the last year, did anyone help {you/SP} or handle these kinds of money matters for {you/{him/her}}? This includes family, friends, {a service provided by the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

IF NEEDED: Money matters include opening, closing or cashing in CDs, checking, money market or retirement accounts or applying for loans.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION SC |
| | REFUSED | SECTION SC |
| | DON'T KNOW | SECTION SC |

---

**HA52A**                   **op5moneyhlp**                 R5 HA52A HELPS SP WITH MONEY

                            **op5relatnshp**                R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} lives}."

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE

SP LIVES/DIED on the person roster.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who was that?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA52b.   [What is (his/her) first name?]   CONFIRM SPELLING
HA52c.   [What is (his/her) last name?]   CONFIRM SPELLING
HA52d.   [What is (his/her) relationship to {you/SP}?]   PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |

| 38 | CO-WORKER |
|----|-----------|
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA25, set HELPEDWITHMONEYMATTERS flag = 1 (yes).

Go to Section SC – Self-care Activities.

---

| **Derived Variables from Items in HA Section** | |
|---|---|
| **ha5dlaunsfdf** | R5 D LAUNDRY SELF AND DIFF LEVEL |
| **ha5dshopsfdf** | R5 D SLF SHOPPING AND DIFF LEVEL |
| **ha5dmealsfdf** | R5 D SELF MEALS AND DIFF LEVEL |
| **ha5dbanksfdf** | R5 D SELF BANKS AND DIFF LEVEL |
| **ha5dmealwhl** | R5 D SP RECEIVES MEALS ON WHEELS |
| **ha5dmealtkot** | R5 D SP RECEIVES TAKE OUT MEALS |
| **ha5dlaunreas** | R5 D LAUNDRY REASN WITH BY OTHERS (see HA4) |
| **ha5dshopreas** | R5 D SHOP REASN WITH BY OTHERS (see HA26) |
| **ha5dmealreas** | R5 D MEALS REASN WITH OTHERS (see HA33) |
| **ha5dbankreas** | R5 D BANK BILL REASON WITHBY OTH (see HA43) |

## SC1PRE        SC1PRE        NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "SP ate".

Otherwise, display "you eat/SP eats".

> Now I have a few questions about how {{you eat/SP eats}/SP ate}.
>
> PRESS 1 AND ENTER TO CONTINUE

## SC1        sc5eatdev        R5 SC1 EVER USE ADAPTED UTENSILS

**DISPLAY INSTRUCTIONS:**

Display "adapted" in bold underlined text.

If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

> In the last month {of {his/her} life}, did {you/SP} ever use adapted utensils to help {you/{him/her}} eat or cut {your/{his/her}} food?
>
> IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| 7 | ALWAYS FED THROUGH OR TUBE |
| | REFUSED |
| | DON'T KNOW |

## BOX SC2        BOX SC2        NOT ON FILE

> If SC1 = 7 (FEEDING TUBE), go to SC7PRE.
>
> Else if DECEASED flag = 1 (YES), go to SC3.
>
> Else if SC1 = 1 (YES), go to SC2.
>
> Otherwise, go to SC3.

## SC2        sc5eatdevoft        R5 SC2 OFTEN USE ADAPTED UTENSLS

**QUESTION TEXT:**

> SHOW CARD SC1
>
> Did {you/SP} use adapted utensils every time {you/{he/she}} had a meal, most times, sometimes, or rarely?

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| | REFUSED |
| | DON'T KNOW |

---

**SC3**  sc5eathlp  R5 SC3 DID ANYONE HELP YOU EAT

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived},".

If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".

Otherwise, display "lives".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} eat, for instance, by cutting up food or feeding {you/{him/her}}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX SC3A**  BOX SC3A  NOT ON FILE

If SC3=1 (YES), go to SC3a.

Else if DECEASED flag=1 (YES), go to SC7PRE.

Otherwise, go to SC5.

---

**SC3A**  op5eathlp  R5 SC3A HELPS SP WITH EATING

op5relatnshp  R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who helped {you/SP} eat?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.
SC3b.　[What is (his/her) first name?]　CONFIRM SPELLING
SC3c.　[What is (his/her) last name?]　CONFIRM SPELLING
SC3d.　[What is (his/her) relationship to {you/SP}?]　PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
　　For each roster selection/addition at SC3, set HELPSWITHEATING flag = 1 (yes).

| | | |
|---|---|---|
| **BOX SC4** | **BOX SC4** | NOT ON FILE |

If DECEASED flag=1 (YES), go to SC7PRE.

Otherwise, go to SC4.

---

**SC4**                    **sc5eatslfoft**              R5 SC4 HOW OFTEN EAT BY YOURSELF

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD SC2

In the last month when {you/SP} ate, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

**CODES**

| | | |
|---|---|---|
| 1 | MOST TIMES | |
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | BOX SC6 |
| | REFUSED | BOX SC6 |
| | DON'T KNOW | BOX SC6 |

---

**SC5**                    **sc5eatslfdif**              R5 SC5 DIFFICULTY EATING BY SELF

**DISPLAY INSTRUCTIONS:**

If SC1 = 1 (used adapted utensils), display "when {you/SP} used adapted utensils,".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, {when {you/SP} used adapted utensils,} how much difficulty did {you/{he/she}} have eating by {yourself/{himself/herself}} and without help?  Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

**BOX SC6**                **BOXSC6**                    NOT ON FILE

If SC3 = 2 (no help with eating) and SC5 = 1 (no difficulty eating), go to SC7PRE.

Otherwise, go to SC6.

---

**SC6**                    **sc5eatwout**               R5 SC6 GO WOUT EAT BECSE NO HELP

**DISPLAY INSTRUCTIONS:**

If SC4 = 4 (never ate by self w/out help), display "no one was there to help"

Otherwise, display "it was too difficult to feed {yourself/{himself/herself}}".

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without eating because {no one was there to help/it was too difficult to feed {yourself/{himself/herself}}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**SC7PRE**          SC7PRE          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "SP got".
Otherwise, display "you get/SP gets".

Now I have a few questions about how {{you get/SP gets}/SP got} cleaned up.

PRESS 1 AND ENTER TO CONTINUE

---

**SC7**          **sc5showrbat1**          R5 SC7 SP SHOWERED

**sc5showrbat2**          R5 SC7 SP TOOK BATHS IN A TUB

**sc5showrbat3**          R5 SC7 SP WASHED SOME OTHR WAY

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life" and "{he/she} took".

Otherwise, display "you take/{he/she} takes".

**QUESTION TEXT:**

In the last month {of {his/her} life}, how did {you/SP} usually clean {yourself/himself/herself} up? By taking a shower, bathing in a tub, or washing up some other way?

IF NEEDED: Do not include whirlpool baths {you take/{he/she} takes}/{{he/she} took} for therapy.

SELECT ALL THAT APPLY

**CODES**          **Code All That Apply**

| | |
|---|---|
| 1 | SHOWERED |
| 2 | TOOK BATHS IN A TUB |
| 3 | WASHED UP SOME OTHER WAY |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If SC7 = 1 (showered) and SC7 ≠ 2 (took baths) and SC7 ≠ 3 (washed up), set SHOWERING flag = 1 (yes).
If SC7 = 2 (took baths) and SC7 ≠ 1 (showered) and SC7 ≠ 3 (washed up), set TAKINGBATHS flag = 1 (yes).
If SC7 = 3 (washed up) and SC7 ≠ 1 (showered) and SC7 ≠ 2 (took baths), set WASHINGUP flag = 1 (yes).

---

**BOX SC7A**          **BOX SC4A**          NOT ON FILE

---

If DECEASED flag = 1 (YES) and SC7 = 1 (SHOWERED), 2 (BATHS), or 3 (WASH OTHER WAY), go to SC7A.

Else if DECEASED flag <> 1 (YES) and more than one response to SC7, go to SC8.

Else if DECEASED flag <> 1 (YES) and only one response at SC7, go to BOX SC9.

Otherwise, if SC7 = RF or DK, go to SC16PRE.

---

# SC7A                    **sc5bdevdec**              R5 SC7A USE BATH DEVICE IN LML

**DISPLAY INSTRUCTIONS:**
>   If SC7=1 display "showering".
>   If SC7=2 display "bathing".
>
>   If SC7=3 display "washing up".
>
>   If more than one answer displayed, separate by "or".

**QUESTION TEXT:**
>   In the last month of {his/her} life, did {SP} ever use grab bars or a shower or tub seat when {showering/bathing/washing up}?
>
>   IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. A shower or tub seat is a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

**CODES**
| | |
|---|---|
| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

# SC8                     **sc5prfrshbth**            R5 SC8 PREFER SHOWR BATH OR OTHR

**DISPLAY INSTRUCTIONS:**
>   If SC7 = 1 (showered), display "showering" and response option 1.
>   If SC7 = 2 (took baths), display "taking baths" and response option 2.
>   If SC7 = 3 (washed up), display "washing up some other way" and response option 3.
>   Display "or" between methods of cleaning up.

**QUESTION TEXT:**
>   In the last month, which did {you/SP} do most often: {showering / taking baths / washing up some other way}?

**CODES**
| | |
|---|---|
| 1 | SHOWERING |
| 2 | TAKING BATHS |
| 3 | WASHING UP SOME OTHER WAY |

**PROGRAMMER INSTRUCTIONS:**
>   If SC8 = 1 (showering), set SHOWERING flag = 1 (yes).
>   If SC8 = 2 (taking baths), set TAKINGBATHS flag = 1 (yes).
>   If SC8 = 3 (washing up), set WASHINGUP flag = 1 (yes).

---

# BOX SC9                 **BOXSC9**                  NOT ON FILE

---

## SC9      sc5scusgrbrs      R5 SC9 HOW OFTEN USE GRAB BARS

**DISPLAY INSTRUCTIONS:**

If SHOWERING flag = 1 (yes), display "showered".
If TAKINGBATHS flag = 1 (yes), display "took a bath".

**QUESTION TEXT:**

SHOW CARD SC3

In the last month, did {you/SP} use grab bars every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

## BOX SC10      BOXSC10      NOT ON FILE

If BATHSEAT flag = 1 (yes) and [SHOWERING flag = 1 (yes) or TAKINGBATHS flag = 1 (yes)], go to SC10.

Otherwise, go to SC11.

---

## SC10      sc5shtubseat      R5 SC10 OFTN USE SHOWR TUB SEAT

**DISPLAY INSTRUCTIONS:**

If SHOWERING flag = 1 (yes), display "showered".
If TAKINGBATHS flag = 1 (yes), display "took a bath".

**QUESTION TEXT:**

SHOW CARD SC3

In the last month, did {you/SP} use the shower or tub seat every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A shower or tub seat is a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

**CODES**

| | |
|---|---|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

---

## SC11          sc5bathhlp          R5 SC11 ANYN HLP SHOWR BATH OTHR

**DISPLAY INSTRUCTIONS:**

If SC7 = 1 (showered) or SHOWERING flag = 1 (YES), display "shower".
If SC7 = 2 (took baths) or TAKINGBATHS flag = 1 (YES), display "take a bath".
If SC7 = 3 (washed up) or WASHINGUP flag = 1 (YES), display "wash up".
If more than one answer displayed, separate by "or".

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived}}".
If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} {shower/ take a bath/wash up}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX SC11A          BOX SC11A          NOT ON FILE

If SC11=1 (YES), go to SC11a.

Else if DECEASED flag=1 (YES), go to SC16PRE.

Otherwise, go to SC13.

---

## SC11A          op5bathhlp          R5 SC11A HELPS SP WITH BATHING

                              op5relatnshp          R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

If SHOWERING flag = 1 (yes), display "shower".
If TAKINGBATHS flag = 1 (yes), display "take a bath".
If WASHINGUP flag = 1 (yes), display "wash up".

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who helped {you/SP} {shower/take a bath/wash up}?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC11b.  [What is (his/her) first name?]   CONFIRM SPELLING
SC11c.  [What is (his/her) last name?]   CONFIRM SPELLING
SC11d.  [What is (his/her) relationship to {you/SP}?]   PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |

92          OTHER NONRELATIVE

**PROGRAMMER INSTRUCTIONS:**
> For each roster selection/addition at SC11, set HELPSWITHBATHING flag = 1 (YES).

---

**BOX SC12**          **BOX SC12**          NOT ON FILE

> If DECEASED flag = 1 (YES), go to SC16PRE.
>
> Otherwise, go to SC12.

---

**SC12**          **sc5bathoft**          R5 SC12 HOW OFTEN BATHE YOURSELF

**DISPLAY INSTRUCTIONS:**
> If SHOWERING flag = 1 (yes), display "showered".
> If TAKINGBATHS flag = 1 (yes), display "took a bath".
> If WASHINGUP flag = 1 (yes), display "washed up".
>
> DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**
> SHOW CARD SC2
>
> In the last month, when {you/SP} {showered/ took a bath/ washed up}, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help?  Would you say most times, sometimes, rarely, or never?

**CODES**
| | | |
|---|---|---|
| 1 | MOST TIMES | |
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | SC14 |
| | REFUSED | SC14 |
| | DON'T KNOW | SC14 |

---

**SC13**          **sc5bathdif**          R5 SC13 DIFF USING BARS OR SEATS

**DISPLAY INSTRUCTIONS:**
> If SC9 = 1, 2, 3, or 4 (used bath grab bars every time, most times, sometimes, or rarely) or SC10 = 1, 2, 3, or 4 (used bath seat every time, most times, sometimes, or rarely), display "{when {you/SP} used {your/{his/her}}".
>
> If SC9 = 1, 2, 3, or 4 and SC10 = 1, 2, 3, or 4, display "grab bars or shower or tub seat".
>
> Else if SC9 = 1, 2, 3, or 4, display "grab bars".
>
> Else if SC10 = 1, 2, 3, or 4, display "shower or tub seat".
>
> If SHOWERING flag = 1 (yes), display "showering".
> If TAKINGBATHS flag = 1 (yes), display "taking a bath".
> If WASHINGUP flag = 1 (yes), display "washing up".
>
> If SC9 = 1, 2, 3, or 4, display "A grab bar is designed to help you steady yourself.  It may be attached to the wall or built into the shower or tub. Do not include towel racks."

If SC10 = 1, 2, 3, or 4, display "A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in."

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, {when {you/SP} used {your/{his/her}}} {grab bars/shower or tub seat/grab bars or shower or tub seat} how much difficulty did {you/{he/she}} have {showering/ taking a bath/ washing up} by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

IF NEEDED: {A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.} {A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.}

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

## SC14    sc5bathyrgo    R5 SC14 BATHE MRE OFT THN YR AGO

**DISPLAY INSTRUCTIONS:**

If SHOWERING flag = 1 (yes), display "shower".
If TAKINGBATHS flag = 1 (yes), display "take baths".
If WASHINGUP flag = 1 (yes), display "wash up".

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} now {shower/ take baths/ wash up} more often, less often, or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

## BOX SC15    BOXSC15    NOT ON FILE

If SC11 = 2 (no help cleaning up) and SC13 = 1 (no difficulty cleaning up), go to SC16PRE.

Otherwise go to SC15.

---

## SC15    sc5bathwout    R5 SC15 EVER GO WITHOUT WASHING

**DISPLAY INSTRUCTIONS:**

If SC12 = 4 (never cleaned up by self), display "no one was there to help".

Otherwise, display "it was too difficult to do that by {yourself/{himself/herself}}".

If SHOWERING flag = 1 (yes), display "showering".
If TAKINGBATHS flag = 1 (yes), display "taking a bath".
If WASHINGUP flag = 1 (yes), display "washing up".

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without {showering/ taking a bath/ washing up} because {no one was there to help /it was too difficult to do that by {yourself/{himself/herself}}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**SC16PRE**          SC16PRE                    NOT ON FILE

**QUESTION TEXT:**

Now I have a few questions about using the toilet.

IF NEEDED: These questions may seem a bit personal, but they are very important for research on aging and health trends.

PRESS 1 AND ENTER TO CONTINUE

---

**SC16**          **sc5usvartoi1**          R5 SC16 SP USED PORTABLE COMMODE

**sc5usvartoi2**          R5 SC16 SP USED PADS UNDERGMT

**sc5usvartoi3**          R5 SC16 USED GRABBARS FR TOILET

**sc5usvartoi4**          R5 SC16 USED RAISED TOILET SEAT

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for SC16 [a-d]

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

If at SC16a, do not display question text in brackets.
Otherwise, display question text in brackets.

For SC16a, if IS3 = 1 (SP is male), display ", portable urinal".
For SC16d, if IS3 = 1 (SP is male), display ", portable urinals".

If TOILETGRABBAR flag = 1 (yes)  or DECEASED flag=1 (YES), display variable text {c}.
If RAISEDTOILET flag = 1 (yes) or DECEASED flag=1 (YES), display variable text {d}.

If DECEASED flag = 1 (YES), display "of {his/her} life" and "did SP ever use".
Otherwise, display "{have you/has SP} ever used".

**QUESTION TEXT:**

{[}In the last month {of {his/her} life}, {{have you/has SP} ever used}/{did SP ever use}{]}

{variable text [a-d]}

RESPONSE [1] a. a portable commode { portable urinal,} or bedpan?
RESPONSE [2] b. disposable pads or undergarments to help prevent accidentally wetting or soiling {your/{his/her}} clothes?

{RESPONSE [3] c. grab bars around the toilet?
IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or part of a frame that goes over the toilet. Do not include towel racks.}

{RESPONSE [4] d. a raised toilet or raised toilet seat?
IF NEEDED: This includes a toilet seat that is elevated higher than usual, either because the toilet or the seat is raised, or a seat with arms that fits over the toilet. Do not include portable commodes {portable urinals,} or bedpans.}

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

---

## SC17                               sc5toilhlp                R5 SC17 ANYON HLP YOU USE TOILET

**DISPLAY INSTRUCTIONS:**

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived}}".
If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} use the toilet?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX SC17A                          BOX SC171                NOT ON FILE

If SC17 = 1 (YES), go to SC17A.

Else if DECEASED flag = 1 (YES), go to SC21PRE.

Otherwise, go to SC19.

---

## SC17A                              op5toilhlp               R5 SC17A HELPS SP WITH TOILETING

                                     op5relatnshp             R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ENTRY with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text

**QUESTION TEXT:**

Who helped {you/SP} use the toilet?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC17b.   [What is (his/her) first name?]   CONFIRM SPELLING
SC17c.   [What is (his/her) last name?]   CONFIRM SPELLING
SC17d.   [What is (his/her) relationship to {you/SP}?]   [PRESS F1 FOR HELP SCREEN]

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |

| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

For each roster selection/addition at SC17, set HELPSWITHTOILETING flag = 1 (YES).

---

| **BOX SC18** | **BOX SC18** | NOT ON FILE |

If DECEASED flag = 1 (YES), go to SC21PRE

Otherwise, go to SC18.

---

| **SC18** | **sc5toiloft** | R5 SC18 OFTEN USE TOILET BY SELF |

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD SC2

In the last month, when {you/SP} used the toilet, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

**CODES**

| 1 | MOST TIMES | |
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | SC20 |
| | REFUSED | SC20 |
| | DON'T KNOW | SC20 |

---

| **SC19** | **sc5toildif** | R5 SC19 DIFFICUTY WITH GRAB BARS |

**DISPLAY INSTRUCTIONS:**

If SC16c = 1 (used toilet grab bars) or SC16d = 1 (used raised toilet), display "when {you/SP} used the {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat},".

If SC16c = 1 (used toilet grab bars) and SC16d = 1 (used raised toilet), display "grab bars or raised toilet or raised toilet seat"

Else if SC16c = 1 (used toilet grab bars), display "grab bars".
Else if SC16d = 1 (used raised toilet), display "raised toilet or raised toilet seat".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, {when {you/SP} used the} {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat}, } how much difficulty did {you/{he/she}} have using the toilet by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

**CODES**

| 1 | NONE |

| | |
|---|---|
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

## BOX SC20              **BOXSC20**              NOT ON FILE

If SC17 = 2 (no help) and SC19 = 1 (no difficulty), go to SC21PRE.

Otherwise go to SC20.

---

## SC20              **sc5toilwout**              R5 SC20 ACCIDENT WET SOIL CLTHES

**DISPLAY INSTRUCTIONS:**

If SC18= 4 (never used toilet by self), display "no one was there to help {you/{him/her}} get to or use the toilet".

Otherwise, display "it was too difficult to get to or use the toilet by {yourself/{himself/herself}}".

**QUESTION TEXT:**

In the last month, did {you/SP} ever accidentally wet or soil {your/{his/her}} clothes because {no one was there to help {you/{him/her}} get to or use the toilet/it was too difficult to get to or use the toilet by {yourself/{himself/herself}}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## SC21PRE              **SC21PRE**              NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "a person".

Otherwise, display "{you/SP}".

**QUESTION TEXT:**

The next few questions are about getting dressed. By getting dressed we mean changing out of the clothes {{you/SP}/a person} slept in.

PRESS 1 AND ENTER TO CONTINUE

---

## SC21              **sc5dresoft**              R5 SC21 OFTEN YOU GET DRESSED

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

SHOW CARD SC4

In the last month {of {his/her} life}, did {you/SP} get dressed every day, most days, some days, rarely, or never?

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-5 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

## BOX SC22                    BOX SC22                    NOT ON FILE

If SC21=1, 2, 3 or 4, go to SC22.

Else if DECEASED flag = 1 (YES), go to Section DS – Duration of Self Care Activities

Otherwise, go to Box SC27.

## SC22                    **sc5dresdev**                    R5 SC22 USE SPECL ITEMS TO DRESS

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did {you/SP} use any special items to get dressed, such as a button hook, reacher or grabber, or clothes that are designed to get on and off easily?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## SC23                    **sc5dreshlp**                    R5 SC23 ANYONE HELP GET DRESSED

**DISPLAY INSTRUCTIONS:**

If IS3 = 2 (SP is female), display "or bra".

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived},".
If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives".

**QUESTION TEXT:**

In the last month {of {his/her} life}, did anyone ever help {you/SP} get dressed, for instance, by getting clothing over {your/{his/her}} head, helping with clothing behind {your/{his/her}} back like a belt {or bra}, or helping {you/{him/her}} put on socks or shoes?

IF NEEDED: This includes family, friends, {a staff person from the place where {{you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## BOX SC23A

**BOX SC23A**          NOT ON FILE

> If SC23 = 1 (YES), go to SC23A.
>
> Else if DECEASED flag = 1 (YES), go to Section DS – Duration of Self Care Activities.
>
> Otherwise, go to SC25.

## SC23A

**op5dreshlp**          R5 SC23A HELPS SP WITH DRESSING

**op5relatnshp**          R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in bold underlined text.

**QUESTION TEXT:**

> Who helped {you/SP} get dressed?
>
> PROBE: Anyone else?
>
> SELECT ALL THAT APPLY
>
> IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.
>
> SC23b.  [What is (his/her) first name?]  CONFIRM SPELLING
> SC23c.  [What is (his/her) last name?]  CONFIRM SPELLING
> SC23d.  [What is (his/her) relationship to {you/SP}?]  PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |

|    |    |
|----|----|
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

For each roster selection/addition at SC23, set HELPSWITHDRESSING flag = 1 (YES).

---

| **BOX SC24** | **BOX SC24** | NOT ON FILE |
|----|----|----|

If DECEASED flag = 1 (YES), go to Section SC - Self-Care Activities.

Otherwise, go to SC24.

---

| **SC24** | **sc5dresslf** | R5 SC24 OFTEN YOU DRESS YOURSELF |
|----|----|----|

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD SC2

In the last month, when {you/SP} got dressed, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

**CODES**

| 1 | MOST TIMES |  |
|----|----|----|
| 2 | SOMETIMES |  |
| 3 | RARELY |  |
| 4 | NEVER | SC26 |
|  | REFUSED | SC26 |
|  | DON'T KNOW | SC26 |

---

| **SC25** | **sc5dresdif** | R5 SC25 DIF WHN US SP ITMS YRSLF |
|----|----|----|

**DISPLAY INSTRUCTIONS:**

If SC22 = 1 (yes, used special items), display "when {you/SP} used special items to help {you/{him/her}} get dressed,".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, {when {you/SP} used special items to help {you/{him/her}} get dressed, } how much difficulty did {you/{he/she}} have getting dressed by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

**CODES**

| | |
|---|---|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

---

**SC26**          **sc5dresyrgo**          R5 SC26 HOW OFTN YOU GET DRESSED

**DISPLAY INSTRUCTIONS:**

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Compared to a year ago, {do you/does SP} now get dressed more often, less often, or about the same?

**CODES**

| | |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

---

**BOX SC27**          **BOXSC27**          NOT ON FILE

If SC23 = 2 (did not get help) and SC25 = 1 (no difficulty), go to Section DS – Duration of Self Care Accommodations.

Otherwise go to SC27.

---

**SC27**          **sc5dreswout**          R5 SC27 GO WITHOUT GTTNG DRESSED

**DISPLAY INSTRUCTIONS:**

If SC24 = 4 (never dressed by self), display "there was no one there to help".

Otherwise, display "it was too difficult to dress by {yourself/{himself/herself}}".

**QUESTION TEXT:**

In the last month, did {you/SP} ever go without getting dressed because {there was no one there to help

/it was too difficult to dress by {yourself/{himself/herself}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
Go to Section DS – Duration of Self Care Accommodations

---

## Derived Variables from Items in SC Section

| | |
|---|---|
| **sc5deatdevi** | R5 D USES DEVICES WHILE EATING |
| **sc5deathelp** | R5 D HAS HELP EATING |
| **sc5deatsfdf** | R5 D DIFF EATING BY SELF WO HELP |
| **sc5dbathdevi** | R5 D USES DEVICES WHILE BATHING |
| **sc5dbathhelp** | R5 D HAS HELP WHILE BATHING |
| **sc5dbathsfdf** | R5 D DIFF BATHING SELF NO HELP |
| **sc5dtoildevi** | R5 D USES DEVICES WHILE TOILETING |
| **sc5dtoilhelp** | R5 D HAS HELP WHILE TOILETING |
| **sc5dtoilsfdf** | R5 D DIFF LEVEL TOILETING SELF |
| **sc5dresdevi** | R5 D USES DEVICES WHILE DRESSING |
| **sc5dreshelp** | R5 D HAS HELP WHILE DRESSING |
| **sc5dressfdf** | R5 D DIFF LEVEL DRESSING SELF |

## Flag variables set in SC Section

| | |
|---|---|
| **fl5showering** | R5 F SC SP USES SHOWER |
| **fl5takingbth** | R5 F SC SP TAKES BATHS |
| **fl5washingup** | R5 F SC SP WASHES OTHER WAY |

## BOX DS1      BOX DS1       NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and [SC3, SC11, SC17, and SC23 <> 1 (YES)], go to DS1.
Else if NEWSAMPLE flag = 1 (YES), go to DS2.

If DECEASED flag = 1 (YES) and (LAST INT Status = 64 or 61), go to Section PA – Participation.
Else if (LAST INT Status=64), go to Section MC – Medical Care Activities.

Else if DECEASED flag=1 (YES) and [Combined MONTH OF DEATH and YEAR OF DEATH = Combined LAST INT interview month and LAST INT interview year or the month after the LAST INT interview month and LAST INT interview year (LAST INT interview month+1) or Month of Death=DK or RF], go to Section PA – Participation.

Else if [LAST INT SC3, SC11, SC17, and SC23=2 (NO), RF, or DK] and [CURRENT INT SC3, SC11, SC17, or SC23 = 1 (YES), go to DS3C.

Else if [LAST INT SC3, SC11, SC17, or Sc23 = 1 (YES)] and [CURRENT INT SC3, SC11, SC17, and SC23 = 2 (NO), RF, or DK], go to DS3D.

Else if [LAST INT SC3, SC11, SC17, or SC23 = 1 (YES)] and [CURRENT INT SC3, SC11, SC17 or SC23 = 1 (YES), go to DS3E.

Otherwise, go to DS1.

## DS1      ds5gethlpeat       R5 DS1 GET HELP WITH EATING, ETC

**DISPLAY INSTRUCTIONS:**

If NEWSAMPLE flag = 1 (YES), display "In the last year".

If DECEASED flag = 1 (YES), display "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR SP DIED}"

Otherwise, display "Since {LAST INT MONTH AND YEAR}".

**QUESTION TEXT:**

{In the last year/{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR SP DIED}/Since {LAST INT MONTH AND YEAR}}}, did {you/SP} ever get help with eating, getting cleaned up, using the toilet, or getting dressed?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DS4 |
| | REFUSED | BOX DS4 |
| | DON'T KNOW | BOX DS4 |

## BOX DS2      BOXDS2       NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to DS3B.
Otherwise, go to DS3C.

## DS2      ds5hlpmrtnyr       R5 DS2 GET HELP FOR YEAR OR MORE

**DISPLAY INTRUCTIONS:**

      If SC3=1 (YES), display "eating".
      If SC11=1 (YES), display "getting cleaned up"
      If SC17=1 (YES), display "using the toilet"
      If SC23=1 (YES), display "getting dressed"

      If more than one activity displayed, display "or" between each one.

**QUESTION TEXT:**

> {Have you/Has SP} been getting help with {eating} {getting cleaned up} {using the toilet} {getting dressed} for a year or more?
>
> IF NEEDED: {Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

**CODES**

| | | |
|---|---|---|
| 1 | YES, A YEAR OR MORE | |
| 2 | NO, LESS THAN A YEAR | DS3B |
| | REFUSED | BOX DS4 |
| | DON'T KNOW | BOX DS4 |

---

## DS3A        ds5yrsgethlp        R5 DS3A HOW MANY YRS GETTING HLP

**DISPLAY INTRUCTIONS:**

      If only one activity displayed at DS2, display "that".
      If more than one activity displayed at DS2, display "any of these activities".

**QUESTION TEXT:**

> About how many years {have you/has SP} been getting help with {that/any of these activities}?
>
> ENTER NUMBER OF YEARS
>
> ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE.

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 120 |
| Soft Range | 1 to 50 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

      Hard range: 1-120 or 997.
      Soft range: 1-50.
      Go to BOX DS4.

---

## DS3B        ds5mthgethlp        R5 DS3B MNTH FIRST/LAST GET HELP

**DISPLAY INTRUCTIONS:**

      If DS1 = 1 (help in last year), display "last" and "any of these activities".
      If DS2 = 2 (help for less than a year) and only one activity displayed at DS2, display "first" and "that".
      If DS2 = 2 (help for less than a year) and more than one activity displayed at DS2, display "first" and "any of

these activities".
Display "4-DIGIT YEAR" in underlined text.


**QUESTION TEXT:**

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?


ENTER MONTH

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | BOX DS4 |
| DON'T KNOW | BOX DS4 |

---

**DS3B1**  **ds5yrgethlp**  R5 DS3B1 YEAR FIRST/LAST GET HELP

**DISPLAY INSTRUCTIONS:**
If DS1 = 1 (HELP IN LAST YEAR), display "last" and "any of these activities".
If DS2 = 2 (HELP FOR LESS THAN A YEAR) and only one activity displayed at DS2, display "first" and "that".
If DS2 = 2 (HELP FOR LESS THAN A YEAR) and more than one activity displayed at DS2, display "first" and "any of these activities".
Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?


ENTER YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Range: CURRENT YEAR-1 to CURRENT YEAR
Go to BOX DS4.

---

**DS3C**  **ds5helpstmo**  R5 DS3C MONTH SELF CARE HLP START

**DISPLAY INSTRUCTIONS:**
If DECEASED flag = 1 (YES), display "of {his/her} life".

If DS1 = 1 (YES), do not display first sentence and display "any of these activities".

Otherwise, display question intro according to the following instructions:
If CURRENT INT SC3 = 1 (YES), display "eating".
If CURRENT INT SC11 =1 (YES), display "getting cleaned up".
If CURRENT INT SC17 = 1 (YES), display "using the toilet".
If CURRENT INT SC23 = 1 (YES), display "getting dressed".

If more than one activity displayed, display "and" between each one and "any of these activities".

Otherwise, if only one activity displayed, display "that".

Display "first" in bold and underlined text.

**QUESTION TEXT:**

{In the last month {of {his/her} life}, {you/SP} got help with {eating} {getting cleaned up} {using the toilet} {getting dressed}, and in {LAST INT MONTH AND YEAR}, {you were/SP was} not getting this help.}

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

**ENTER NUMBER**

| | |
|---|---|
| RANGE | 1 to 12 |
| REFUSED | BOX DS3D |
| DON'T KNOW | BOX DS3D |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 1-12 and 90

If DS3c=90, go to BOX DS4

---

# DS3C1                 **ds5helpstyr**              R5 DS3C1 YEAR SELF CARE HELP STARTED

**DISPLAY INSTRUCTIONS:**

Display "4-DIGIT YEAR" in underlined text.

**QUESTION TEXT:**

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER 4-DIGIT YEAR

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Soft Range: CURRENT YEAR -1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #15.

---

# BOX DS3D          **BOX DS3D**               NOT ON FILE

If [LAST INT SC3, SC11, SC17, and SC23 = 2 (NO), RF, or DK] and [CURRENT INT SC3, SC11, SC17, or SC23 = 1 (YES)] go to BOX DS4.

Otherwise, go to DS3D.

---

# DS3D                 **ds5helpendmo**             R5 DS3D MONTH SELF CARE HELP ENDED

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DS1 = 1 (YES), do not display first sentence and display "any of these activities".

Otherwise display question intro according to the following instructions:
If LAST INT SC3 = 1 (YES), display "eating".
IF LAST INT SC11 = 1 (YES), display "getting cleaned up".
IF LAST INT SC17 = 1 (YES), display "using the toilet".
If LAST INT SC23 = 1 (YES), display "getting dressed".

If more than one activity displayed, display "and" between each one and "any of these activities".
Otherwise if only one activity displayed, display "that".

Display "last" in the phrase "last get help" in bold underlined text.

Display "MONTH" in underlined text.

**QUESTION TEXT:**

{In {LAST INT MONTH AND YEAR}, {you/SP} got help with {eating} {getting cleaned up} {using the toilet} {getting dressed} and in the last month {of {his/her} life}, {you were/{he/she} was} not getting this help.}

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 12 |
| REFUSED | BOX DS4 |
| DON'T KNOW | BOX DS4 |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 1-12 and 90

If DS3D=90, go to BOX DS4

---

# DS3D1          **ds5helpendyr**          R5 DS3D1 YEAR SELF CARE HELP ENDED

**QUESTION TEXT:**

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of these activities}?

ENTER 4-DIGIT YEAR

**ENTER YEAR**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Soft Range: CURRENT YEAR -1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview, display error message #15.

Go to BOX DS4.

---

# DS3E          **ds5nohelp**          R5 DS3E NO SELF CARE HELP MTH PLUS

**DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display "of {his/her} life" and "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}".
Otherwise, display "Since {LAST INT MONTH AND YEAR}".

Display question intro according to the following instructions:
If CURRENT INT SC3 = 1 (YES), display "eating".
If CURRENT INT Sc11 = 1 (YES), display "getting cleaned up".
If CURRENT INT SC17 = 1 (YES), display "using the toilet".
If CURRENT INT Sc23 = 1 (YES), display "getting dressed".

If more than one activity displayed, display "and" between each one.

**QUESTION TEXT:**

In the last month {of {his/her} life}, {you/SP} got help with {eating} {getting cleaned up} {using the toilet} {getting dressed}, and in {LAST INT MONTH AND YEAR} {you were/{he/she} was} also getting help like this.

{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}/Since {LAST INT MONTH AND YEAR}}, did {you/{he/she}} go without help like this for a month or more?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX DS4 |
| 90 | LAST INTERVIEW INFORMATION INCORRECT | BOX DS4 |
| | REFUSED | BOX DS4 |
| | DON'T KNOW | BOX DS4 |

---

**DS3F**     **ds5nohelpmos**     R5 DS3F MONTHS OF NO SELF CARE HELP

**QUESTION TEXT:**

For about how many months altogether did {you/SP} go without help like this?

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 24 |
| REFUSED | |
| DON'T KNOW | |

---

**BOX DS4**     **BOX DS4**     NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and {AGE ON PERSON ROSTER} = 65, go to Section MC - Medical Care Activities.
Else if NEWSAMPLE flag = 1 (YES) and DS3A = 997 (HELP ENTIRE LIFE), go to Section MC - Medical Care Activities.
Else if NEWSAMPLE flag = 1 (YES) and DS3A = 1-120 and {AGE ON PERSON ROSTER} – [YEARS FROM DS3A} <= 65, go to Section MC - Medical Care Activities.
Else if NEWSAMPLE flag = 1 (YES), go to DS4PRE.
Else if DECEASED flag = 1 (YES) and NOTALERT flag = 1 (YES), go to Section CL - Closing.
Else if DECEASED flag = 1 (YES), go to Section PA - Participation.
Otherwise, go to Section MC - Medical Care Activities.

---

**DS4PRE**     **DS4PRE**     NOT ON FILE

Now think about the time around when {you/SP} turned 65.

PRESS 1 AND ENTER TO CONTINUE

| **DS4** | **ds5gthptrn65** | R5 DS4 GET HLP ARND TIME TRND 65 |

**QUESTION TEXT:**

{Were you/Was SP} getting help with eating, getting cleaned up, using the toilet, or getting dressed around the time when {you/he/she} turned 65?

**CODES**

| 1 | YES | SECTION MC |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

| **BOX DS5** | **BOXDS5** | NOT ON FILE |

If DS2 = 1 (help for year or more) or 2 (help for less than a year) or DS1 = 1 (help in last year), go to Section MC – Medical Care Activities.
Else, go to DS5.

| **DS5** | **ds5gthpsin65** | R5 DS5 GETTING HLP SNCE TRNED 65 |

**QUESTION TEXT:**

Since {you/SP} turned 65, was there any time when {you/he/she} got help with these activities (eating, getting cleaned up, using the toilet, or getting dressed)?

**CODES**

| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section MC – Medical Care Activities

| **Derived Variables from Items in DS Section** |
| --- |
| **ds5dhlpyr** | R5 D ANY SELF CARE HELP LAST YEAR |
| **ds5dhlpst** | R5 D MTHS SINCE SLF CARE HELP ST |
| **ds5dhlpend** | R5 D MTHS SINCE SLF CARE HLP END |
| **ds5dhlpyrs** | R5 D YEARS HELP IN CARING 4 SELF |
| **ds5dschlp** | R5 D MONTHS OF SELF CARE HELP |
| **ds5dschlpgr** | R5 D SELF CARE HELP GROUP |
| **ds5flag** | R5 D SPECIAL CASES DS SECTION ROUTE |

---

## MC1PRE                MC1PRE                NOT ON FILE

**QUESTION TEXT:**

> The next few questions are about medicines that {you take/SP takes} that are prescribed by a doctor.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## MC1                mc5meds                R5 MC1 IN MNTH TKE MEDS PRESCRBD

**DISPLAY INSTRUCTIONS:**

   DISPLAY "in the last month" IN BOD UNDERLINED TEXT

**QUESTION TEXT:**

> In the last month, did {you/SP} take any medicines prescribed by a doctor?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | GO MC10PRE |
| | REFUSED | GO MC10PRE |
| | DON'T KNOW | GO MC10PRE |

---

## MC2                mc5medstrk                R5 MC2 KEEP TRCK PRESCRIED MEDS

**DISPLAY INSTRUCTIONS:**

   If PROXY flag is null, display "1a".
   If PROXY flag = 1 (yes), display "1b".

   DISPLAY "last month" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> SHOW CARD {1a/1b}
>
> Next we'd like to know more about how {you keep/SP keeps} track of {your/{his/her}} prescribed medicines. By keeping track, we mean making sure {you take/{he/she} takes} the correct amount at the right time.
>
> Which answer best describes how {you/SP} did that in the last month? Did {you/{he/she}} always do this by {yourself/{himself/herself}}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

**CODES**

| | | |
|---|---|---|
| 1 | ALWAYS DID IT BY SELF | MC3 |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | MC3 |
| 3 | SOMEONE ELSE ALWAYS DID IT | MC5A |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | MC6 |
| | REFUSED | MC7 |
| | DON'T KNOW | MC7 |

---

**MC2A**                    **mc5medsslf**                    R5 MC2A LAST MNTH KEEP TRACK SLF

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/{himself/herself}}" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

In the last month, did {you/SP} ever keep track of {your/{his/her}} prescribed medicines by {yourself/{himself/herself}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**MC3**          **mc5whrgtmed1**          R5 MC3 SP GOT MEDS LOCAL STORE

          **mc5whrgtmed3**          R5 MC3 SP GOT MEDS BY MAIL

          **mc5whrgtmed3**          R5 MC3 SP GOT MEDS HEC PRVD_HSP

          **mc5whrgtmed4**          R5 MC3 SP GOT MEDS OTHR SPECIFY

**DISPLAY INSTRUCTIONS:**

Display "local" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Where did {you/SP} get the medicines that {you/{he/she}} took in the last month? Did {you/{he/she}} get any of these from a local store or pharmacy, by mail, or somewhere else?

SELECT ALL THAT APPLY

**CODES**          **Code All That Apply**

| | | |
|---|---|---|
| 1 | LOCAL STORE OR PHARMACY | BOX MC3B |
| 2 | BY MAIL | BOX MC3B |
| 3 | HEALTH CARE PROVIDER/HOSPITAL | BOX MC3B |
| 91 | SOMEWHERE ELSE (SPECIFY) | |
| | REFUSED | MC4 |
| | DON'T KNOW | MC4 |

**PROGRAMMERS INSTRUCTIONS:**
If 92 (SOMEWHERE ELSE) is selected with any other response, go to MC3A.

---

**MC3A**          **MC3A**          NOT ON FILE

**QUESTION TEXT:**

SPECIFY PLACE {SP} GOT PRESCRIBED MEDICINES IN THE LAST MONTH

**ENTER TEXT**

          Length                    50

---

## BOX MC3B

**BOX MC3B**                    NOT ON FILE

If MC3 = 1 (LOCAL STORE OR PHARMACY), go to MC3B.
Otherwise, go to MC4.

---

## MC3B

| | |
|---|---|
| **mc5howpkupm1** | R5 MC3B SP PICKD UP MEDS BY SELF |
| **mc5howpkupm2** | R5 MC3B SP HAD MEDS DELIVERED |
| **mc5howpkupm3** | R5 MC3B SMEON ELSE PICKD UP MEDS |

**QUESTION TEXT:**

Thinking of these prescribed medicines that {you/SP} took in the last month and got from a local store or pharmacy, did {you/{he/she}} pick them up {yourself/{himself/herself}}, have them delivered, or did someone else pick them up for {you/{him/her}}?

SELECT ALL THAT APPLY

**CODES**        **Code All That Apply**
1        PICKED THEM UP BY SELF
2        HAD THEM DELIVERED
3        HAD SOMEONE ELSE PICK THEM UP
          REFUSED
          DON'T KNOW

---

## MC4

**mc5medsrem**        R5 MC4 USE REMNDERS TO KEEP TRCK

**DISPLAY INSTRUCTIONS:**

Display "In the last month" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOW CARD MC2

In the last month, when {you/SP} kept track of {your/{his/her}} medicines, how often did {you/{he/she}} use reminders such as a pill organizer, box, dispenser, or calendar? Would you say every time, most times, sometimes, rarely, or never?

**CODES**
1        EVERY TIME
2        MOST TIMES
3        SOMETIMES
4        RARELY
5        NEVER
          REFUSED
          DON'T KNOW

---

## BOX MC5A

**BOX MC5A**        NOT ON FILE

If MC2 = 1 (always did by self), DK or RF, go MC7.
Otherwise, go to MC5A.

---

## MC5A

**op5medshlp**        R5 MC5A HELPS SP WITH MEDICINES

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

If FACILITY flag =1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If MC2 = 2 (always with someone else) display "with". If
MC2 = 3 (someone else always did) display "for".
If MC2 = 4 (varied), display "with or for".

Display "first" and "last" in underlined text in the question text for name.

**QUESTION TEXT:**

In the last month, who kept track of {your/SP's} medicines {with/for/with or for} {you/{him/her}}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MC5b. [What is (his/her) first name?] CONFIRM SPELLING

MC5c. [What is (his/her) last name?] CONFIRM SPELLING

MC5d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |

| 22 | NEPHEW |
|----|--------|
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at MC5, set HELPEDTRACKMEDS flag = 1 (yes).

---

**BOX MC6**      **BOX MC6**      NOT ON FILE

If MC2 = 2 (always with someone else), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to MC8.

If MC2 = 3 (someone else always did), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC9.

If MC2 = 4 (varied) and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC7.

Otherwise go to MC6

---

**MC6**      **mc5dmedsreas**      R5 D MEDS REASN BY WITH OTHERS

**DISPLAY INSTRUCTIONS:**
If MC2 = 2 (always with someone else), display "with".
If MC2 = 3 (someone else always did), display "for".
If MC2 = 4 (varied) display, "with or for".
If MC2 = 5 (not done in last month), do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text in the response text. Display response codes in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASONS" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers

**QUESTION TEXT:**
{What is the reason someone else kept track of {your/SP's} medicines {with/for/with or for} {you/{him/her}}?}
Was that because of {your/{his/her}} health or functioning or some other reason?

SELECT ALL THAT APPLY

**CODES**      **Code All That Apply**

|   |   |
|---|---|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN' LIKE TO DO IT |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMERS INSTRUCTIONS:**

If MC6 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPTRACKMEDS flag = 1 (yes).

---

## BOX MC7          **BOX MC7**          NOT ON FILE

> If MC2a = 1 (yes by self), go to MC7.
> If MC2 = 2 (always with someone else) or (MC2a = 2 (didn't do by self), DK or RF), go to MC8.
> If [MC2 = 3 (someone else always did) or 5 (not done in last month)] and HEALTHREASONHELPTRACKMEDS flag = 1 (yes), go to BOX MC9.
> Otherwise go to MC10PRE.

---

## MC7          **mc5medsdif**          R5 MC7 HOW DIFFIC KEEP TRACK MED

**DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/{himself/herself}}" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> In the last month, how much difficulty did {you/SP} have keeping track of {your/{his/her}} medicines by {yourself/{himself/herself}}?  Would you say none, a little, some, or a lot?

**CODES**

|   |   |
|---|---|
| 1 | NONE |
| 2 | A LITLE |
| 3 | SOME |
| 4 | A LOT |
|   | REFUSED |
|   | DON'T KNOW |

---

## MC8          **mc5medsyrgo**          R5 MC8 COMPAR YR AGO HW KEP TRCK

**DISPLAY INSTRUCTIONS:**

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> Compared to a year ago, {do you/does SP} keep track of {your/{his/her}} medicines {yourself/himself/herself} more often, less often, or about the same?

**CODES**

|   |   |
|---|---|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
|   | REFUSED |
|   | DON'T KNOW |

## BOX MC9

**BOX MC9**      NOT ON FILE

> If [MC2 =1 (always by self) or 4 (varied)] and [MC7 = 2 (a little difficulty) or MC7 = 3 (some difficulty) or MC7 = 4 (a lot of difficulty)], go to MC9.
>
> If [MC2 = 2 (always with someone else) or MC2 = 3 (someone else always did) or MC2 = 4 (varied) or MC2 = 5 (not done in last month)] and [HEALTHREASONHELPTRACKMEDS flag = 1 (yes) or HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to MC9.
>
> Otherwise, go to MC10PRE.

## MC9

**mc5medsmis**    R5 MC9 MAKE MISTAKE TAKING MEDS

**DISPLAY INSTRUCTIONS:**

> If MC2 = 1 (always by self) or 5 (not done in last month) or MC2a = 1 (yes by self), display "it was too difficult to keep track of them by {yourself/{himself/herself}}"
>
> Otherwise display "no one was there to help or keep track of them for {you/{him/her}}".

**QUESTION TEXT:**

> In the last month, did {you/SP} ever make a mistake in taking {your/{his/her}} prescribed medicines because {it was too difficult to keep track of them by {yourself/{himself/herself}} /no one was there to help or keep track of them for {you/{him/her}}}?
>
> IF NEEDED: That is, did {you/SP} take {your/{his/her}} medicines at the wrong time or in the wrong amount or miss taking them altogether?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

## MC10PRE

**MC10PRE**    NOT ON FILE

**QUESTION TEXT:**

> The next questions are about how {you handle/SP handles} {your/{his/her}} medical care.
>
> PRESS 1 AND ENTER TO CONTINUE

## MC10

**mc5havregdoc**    R5 MC10 YOU HAVE REGULAR DOCTOR

**QUESTION TEXT:**

> Is there a doctor that {you think/SP thinks} of as {your/{his/her}} regular doctor, that is, a doctor {you usually go/{he/she} usually goes} to when {you are sick and need/{he/she} is sick and needs} advice about {your/{his/her}} health?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | MC12 |
| | REFUSED | MC12 |
| | DON'T KNOW | MC12 |

## MC11    MC11                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "FIRST" in bold underlined text.

**QUESTION TEXT:**

Please tell me the first and last name of {your/SP's} regular doctor.

ENTER FIRST NAME.  CONFIRM SPELLING.

IF FIRST NAME UNKNOWN, ENTER DR.

**ENTER TEXT**

| | |
|---|---|
| Length | 25 |
| REFUSED | |

## MC11A    MC11A                   NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "LAST" in bold underlined text.

**QUESTION TEXT:**

[Please tell me the first and last name of {your/SP's} regular doctor.]

ENTER LAST NAME.  CONFIRM SPELLING.

**ENTER TEXT**

| | |
|---|---|
| Length | 25 |
| REFUSED | |
| DON'T KNOW | |

## MC12    mc5regdoclyr            R5 MC12 SEEN REG DOC WTHN LST YR

**DISPLAY INSTRUCTIONS:**

If MC10 = 1 (yes, regular doctor), display "{your/{his/her}} regular doctor"

Otherwise, display "a doctor"

DISPLAY "last year" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

{Have you/Has SP} seen {{your/{his/her}} regular doctor/ a doctor} within the last year?  That is, since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | MC20PRE |
| | REFUSED | MC20PRE |
| | DON'T KNOW | MC20PRE |

## MC15    mc5hwgtregd1            R5 MC15 SP DROVE SELF TO REG DOC

mc5hwgtregd2            R5 MC15 FAM PD HLP DRVE REG DOC

| | |
|---|---|
| **mc5hwgtregd3** | R5 MC15 VAN PLC SP LIVE REG DOC |
| **mc5hwgtregd4** | R5 MC15 VAN FR DIS SENIOR REG DC |
| **mc5hwgtregd5** | R5 MC15 PUBLIC TRANSPORT REG DOC |
| **mc5hwgtregd6** | R5 MC15 SP TOOK TAXI TO REG DOC |
| **mc5hwgtregd7** | R5 MC 15 SP WALKED TO REG DOC |
| **mc5hwgtregd8** | R5 MC15 REG DOC WAS HOME VISIT |
| **mc5hwgtregd9** | R5 MC15 OTHR SPECIFY REG DOC |

**DISPLAY INSTRUCTIONS:**

If DT1 = 1 (drives every day), 2 (drives most days), 3 (drives some days) or 4 (rarely) OR DROVEINLASTYEAR flag = 1 (yes), display "drive," and response 1.

If FACILITY flag = 1 (yes), display "use a service provided by the place where {you live/{he/she} lives},".

If FACILITY flag = 1 (yes) or RETIREMENT COMMUNITY flag = 1 (yes), display response 3 and for response 4, "not provided by the place SP lives".

If MC10 = 1 (yes, regular doctor), display "{your/{his/her}} regular doctor".

Otherwise, display "the doctor".

DISPLAY "In the last year" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

SHOWCARD MC3

In the last year, how did {you/SP} get to {{{your/{his/her}} regular doctor/the doctor}? Did {you/{he/she}} {drive,} get a ride from a family member or friend, {use a service provided by the place where {you live/{he/she} lives},} or what?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | {DROVE} | MC16 |
| 2 | GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP | MC16 |
| 3 | {USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LIVES} | MC16 |
| 4 | USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {(NOT PROVIDED BY THE PLACE SP LIVES)} | MC16 |
| 5 | TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM) | MC16 |
| 6 | TOOK A TAXI | MC16 |
| 7 | WALKED | MC16 |
| 8 | HOME VISIT | MC16 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | MC16 |
| | DON'T KNOW | MC16 |

---

| **MC15A** | **MC15A** | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

SPECIFY HOW GOT TO DOCTOR

ENTER TEXT

        Length                                              50

___

## MC16                    **mc5ansitindr**              R5 MC16 ANONE SIT IN W YOU AT DR

**DISPLAY INSTRUCTIONS:**

   If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},". If

   MC10 = 1 (yes, regular doctor), display "regular".

   DISPLAY "last year" IN BOLD UNDERLINED TEXT

**QUESTION TEXT:**

   In the last year, did anyone sit in with {you/SP} and {your/{his/her}} {regular} doctor during
   {your/{his/her}} visits?

   IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she}
   lives},} or someone paid to help {you/{him/her}}.

**CODES**
| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | MC20PRE |
| | REFUSED | MC20PRE |
| | DON'T KNOW | MC20PRE |

___

## MC17A                   **op5dochlp**                 R5 MC17A SITS IN W SP AT DRS

                          **op5relatnshp**              R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

   Display HELPER RELATIONSHIP CODES.

   Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST
   NAME and RELATIONSHIP TO SP fields.

   If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

   If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE
   PLACE SP LIVES/DIED on the PERSON ROSTER.

   Display "first" and "last" in underlined text in the question text for name.

**QUESTION TEXT:**

   Who was that (who sat in with {you/SP} and {your/{his/her}} doctor)?

   IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},}
   or someone paid to help {you/{him/her}}.

   PROBE: Anyone else?

   SELECT ALL THAT APPLY

   IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

   MC17b.  [What is (his/her) first name?] CONFIRM SPELLING

MC17c. [What is (his/her) last name?] CONFIRM SPELLING

MC17d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at MC17 set SATINWITHDOCTOR flag = 1 (yes).

---

| **MC17B** | **MC17B** | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

PRESS 1 AND ENTER TO CONTINUE

---

## BOX MC18

**BOX MC18**  NOT ON FILE

If only one person selected/added at MC17, set SATINWITHDOCTORMOST FLAG=1 (YES) for person selected and go to MC19.
Otherwise, go to MC18

## MC18

**op5dochlpmst**  R5 MC18 SITS MOST IF MORE THAN 1

**DISPLAY INSTRUCTIONS:**

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Display only those roster items selected at MC17. Do not allow new entries. Allow only one roster item to be selected.

If MC10 = 1 (yes, regular doctor), display "regular".

DISPLAY "most often" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

Who sat in with {you/SP} and {your/{his/her}} {regular} doctor most often?

SELECT ONE

**PROGRAMMERS INSTRUCTIONS:**

For roster entry selected at MC18, set SATINWITHDOCTORMOST flag = 1 (yes)

## MC19

**mc5tpersevr1**  R5 MC19 HLP UPTO EXAM TBL DRESS

**mc5tpersevr2**  R5 MC19 REMND SP OF QSTNS FR DOC

**mc5tpersevr3**  R5 MC19 ASK TELL DOC THINGS 4 SP

**mc5tpersevr4**  R5 MC19 HLP SP UNDERSTAND DOC

**DISPLAY INSTRUCTIONS:**

If at MC19b, do not display question text in brackets.
Otherwise, display question text in brackets.

USE "SAME QUESTION STEM" DISPLAY. DISPLAY "last year" IN BOLD UNDERLINED TEXT

If PROXY flag = 1 (YES) and SATINWITHDOCTORMOST flag = 1 (YES) for ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES), display "you".

Else, if SATINWITHDOCTOR MOST flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SPLIVES , display "the person from the place where {you live/SP lives}".
Otherwise, display "FIRST NAME LAST NAME" OF PERSON with SATINWITHDOCTORMOST flag = 1 (YES)

**QUESTION TEXT:**

[{]During those visits in the last year, did {you/FIRST NAME LAST NAME OF PERSON WITH SATINWITHDOCTORMOST flag = 1 (YES)/the person from the place where {you live/SP lives}} ever {]}

[variable text {b-e}]

RESPONSE 2 [b] help {you/SP} with getting on the exam table, dressing, and undressing?
RESPONSE 3 [c] remind {you / SP} about things {you/{he/she}} wanted to ask or tell the doctor?
RESPONSE 4 [d] ask or tell the doctor things for {you/SP}?
RESPONSE 5 [e] help {you/SP} understand what the doctor was saying?

**CODES**

1  YES

| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## MC20PRE      MC2OPRE      NOT ON FILE

**QUESTION TEXT:**

> Now I have a few questions about handling medical bills and insurance.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## MC20      mc5chginspln      R5 MC20 CHGD ADD INS OR DRUG PLN

**DISPLAY INSTRUCTIONS:**

Display "last year" AS BOLD UNDERLINED TEXT

**QUESTION TEXT:**

> In the last year, that is since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} changed {your/his/her} Medicare supplemental plan, {your/his/her} prescription drug plan, or decided to leave a managed care plan?

**CODES**

| 1 | YES | |
| 2 | NO | Section PA |
| | REFUSED | Section PA |
| | DON'T KNOW | Section PA |

---

## MC21      mc5anhlpwdec      R5 MC21 ANYONE HELP W DECISION

**QUESTION TEXT:**

> Did anyone help {you/SP} with that decision or make that decision for {you/him/her}?

**CODES**

| 1 | YES | |
| 2 | NO | Section PA |
| | REFUSED | Section PA |
| | DON'T KNOW | Section PA |

---

## MC22A      op5insurhlp      R5 MC22A HELPS WITH INSUR DECIS

                         op5relatnshp      R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text in the question text for name.

**QUESTION TEXT:**

Who was that (who sat in with {you/SP} and {your/{his/her}} doctor)?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MC22b.  [What is (his/her) first name?]  CONFIRM SPELLING

MC22c.  [What is (his/her) last name?]  CONFIRM SPELLING

MC22d.  [What is (his/her) relationship to {you/SP}?]  PRESS F1 FOR HELP SCREEN

CODES

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |

91          OTHER RELATIVE
92          OTHER NONRELATIVE

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at MC22 set HELPEDMAKEINSURANCEDECITIONS flag = 1 (yes).

Go to Section PA- Participation.

---

## Derived Variables from Items in the MC Section

| | |
|---|---|
| **mc5dmedssfdf** | R5 D DIFF LEVEL MEDICATIONS SELF |
| **mc5dmedsreas** | R5 D MEDS REASN BY WITH OTHERS |

---

## BOX PA1PRE      **BOX PA1PRE**      NOT ON FILE

If DECEASED flag = 1 (YES), go to BOX PA25.
Otherwise, go to PA1PRE.

---

## PA1PRE      **PA1PRE**      NOT ON FILE

**QUESTION TEXT:**

Now let's talk about other activities {you have/SP has} been doing in the last month.

PRESS 1 AND ENTER TO CONTINUE

---

## PA1      **pa5visfrfam**      R5 PA1 EVER VISIT FRIENDS FAMILY

**DISPLAY INSTRUCTIONS:**

Display PA1, PA2, PA3, and PA4 on the same screen.
Display "not" in underlined text.

**QUESTION TEXT:**

In the last month, did {you/SP} ever visit in person with friends or family not living with {you/him/her}, either at {your/his/her} home or theirs ?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA5 |
| | DON'T KNOW | PA5 |

---

## PA2      **pa5hlkepfvst**      R5 PA2 HLTH KP FR VIST FAM FRNDS

**DISPLAY INSTRUCTIONS:**
Display "not" in underlined text.

**QUESTION TEXT:**

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (visiting with friends and family not living with {you/him/her})?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX PA3      **BOX PA3**      NOT ON FILE

If DRIVES flag is null, go to PA3.
Otherwise, go to PA4.

---

## PA3      pa5trkpfrvis      R5 PA3 TRAN PRB KP FR VST FRNDS

**DISPLAY INSTRUCTIONS:**

Display "not" in underlined text.

**QUESTION TEXT:**

In the last month, did a transportation problem ever keep {you/SP} from doing this (visiting in person with friends and family not living with {you/him/her})?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PA4      pa5impvstfam      R5 PA4 IMPRTNT VISIT FRNDS FAMLY

**DISPLAY INSTRUCTIONS:**

Display "not" in underlined text.

**QUESTION TEXT:**

How important is it to {you/SP} to visit in person with friends or family not living with {you/him/her}? Would you say very important, somewhat important, or not so important?

**CODES**

| | |
|---|---|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

---

## PA5      pa5attrelser      R5 PA5 EVER ATTEND RELIG SERVCES

**DISPLAY INSTRUCTIONS:**

Display PA4, PA6, PA7, and PA8 on the same screen.

**QUESTION TEXT:**

In the last month, did {you/SP} ever attend religious services?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA9 |
| | DON'T KNOW | PA9 |

---

## PA6      pa5htkfrrlsr      R5 PA6 HEALTH KEEP FRM RELI SERV

**QUESTION TEXT:**

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (attending religious services)?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX PA7**  **BOX PA7**  NOT ON FILE

If DRIVES flag is null, go to PA7.
Otherwise, go to PA8.

---

**PA7**  **pa5trprrelsr**  R5 PA7 TRAN PRO KEEP FM RELG SER

**QUESTION TEXT:**

In the last month, did a transportation problem ever keep {you/SP} from doing this (attending religious services)?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**PA8**  **pa5imprelser**  R5 PA8 HW IMPORT ARE RELIG SERVS

**QUESTION TEXT:**

How important is it to {you/SP} to attend religious services? Would you say very important, somewhat important, or not so important?

**CODES**

| | |
|---|---|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

---

**PA9**  **pa5clbmtgrac**  R5 PA9 CLUB MEETINGS GRP ACTIVES

**DISPLAY INSTRUCTIONS:**

Display PA9, PA10, PA11, and PA12 on the same screen.
If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display "besides religious services,".

**QUESTION TEXT:**

In the last month, {besides religious services,} did {you/SP} ever participate in clubs, classes, or other organized activities?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA13 |
| | DON'T KNOW | PA13 |

## PA10       pa5hlkpfrclb       R5 PA10 HELTH KEP FRM CLB MTINGS

**QUESTION TEXT:**

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (participating in clubs, classes, or other organized activities)?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## BOX PA11       BOX PA11       NOT ON FILE

If DRIVES flag is null, go to PA11.
Otherwise, go to PA12.

---

## PA11       pa5trprkpfgr       R5 PA11 TRANS PROB KEEP FM GROPS

**QUESTION TEXT:**

In the last month, did a transportation problem ever keep {you/SP} from doing this (participating in clubs, classes, or other organized activities)?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PA12       pa5imparclub       R5 PA12 IMPORT PARTIC CLUBS GRUP

**DISPLAY INSTRUCTIONS:**

If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display "other than religious services"

**QUESTION TEXT:**

How important is it to {you/SP} to participate in clubs, classes, or other organized activities {other than religious services}? Would you say very important, somewhat important, or not so important?

**CODES**

| | |
|---|---|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

---

## PA13       pa5outfrenjy       R5 PA13 EVER GO OUT FOR ENJOYMNT

**DISPLAY INSTRUCTIONS:**

Display PA13, PA14, PA15, and PA16 on the same screen.

If PA9 = 1 (PARTICIPATES IN GROUP ACTIVITIES), display "besides participating in club or group activities".

**QUESTION TEXT:**

In the last month, {besides participating in club or group activities,} did {you/SP} ever go out for enjoyment? This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA17 |
| | DON'T KNOW | PA17 |

---

**PA14**  **pa5hlkpgoenj**  R5 PA14 HLTH KP GO OUT ENJOY

**QUESTION TEXT:**

In the last month, did {your/SP'} health or functioning ever keep {you/him/her} from doing this?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX PA15**  **BOX PA15**  NOT ON FILE

If DRIVES flag is null, go to PA15.
Otherwise, go to PA16.

---

**PA15**  **pa5trprgoout**  R5 PA15 TRANSPORB KEEP FM GO OUT

**QUESTION TEXT:**

In the last month, did a transportation problem ever keep {you/SP} from doing this (going out for enjoyment)?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**PA16**  **pa5impouteny**  R5 PA16 IMPORT GO OUT FOR ENJOYT

**QUESTION TEXT:**

How important is it to {you/SP} that {you go/{he/she} goes} out for enjoyment?  Would you say very

important, somewhat important, or not so important?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

**CODES**

| | |
|---|---|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

---

## PA17                    pa5workfrpay                    R5 PA17 EVER WORK FOR PAY

**DISPLAY INSTRUCTIONS:**
Display PA17 and PA18 on the same screen.

**QUESTION TEXT:**
In the last month, did {you/SP} ever work for pay or in a business {you own/{he/she} owns}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA19 |
| | DON'T KNOW | PA19 |

---

## PA18                    pa5hlkpfrwrk                    R5 PA18 HEALTH KEEP YOU FRM WORK

**DISPLAY INSTRUCTIONS:**
If PA17 = 1 (YES), display "did {your/SP's} health or functioning ever keep {you/him/her} from doing this (working for pay)".
If PA17 = 2 (NO), display "was {your/SP's} health or functioning a reason that {you/he/she} did not do this (work for pay)".

**QUESTION TEXT:**
In the last month, {did {your/SP's} health or functioning ever keep {you/him/her} from doing this (working for pay)/was {your/SP's} health or functioning a reason that {you/he/she} did not do this (work for pay)}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PA19                    pa5voltrwork                    R5 PA19 EVER DO VOLUNTEER WORK

**DISPLAY INSTRUCTIONS:**
Display PA19 and PA20 on the same screen.

**QUESTION TEXT:**
In the last month, did {you/SP} ever do volunteer work?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA21 |
| | DON'T KNOW | PA21 |

---

## PA20      **pa5hlkpfrvol**      R5 PA20 HELTH KEEP FM VOLUNTRING

**DISPLAY INSTRUCTIONS:**

If PA19 = 1 (YES), display "did {your/SP's} health or functioning ever keep {you/him/her} from doing this (volunteer work)".

If PA19 = 2 (NO), display "was {your/SP's} health or functioning a reason that {you/he/she} did not do this (volunteer work)".

**QUESTION TEXT:**

In the last month, {did {your/SP's} health or functioning ever keep {you/him/her} from doing this (volunteer work)/was {your/SP's} health or functioning a reason that {you/he/she} did not do this (volunteer work)}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## PA21      **pa5prcranoth**      R5 PA21 PROVIDE CARE ANTHER PERS

**DISPLAY INSTRUCTIONS:**

If PA17 = 1 (WORKED FOR PAY) or PA19 = 1 (VOLUNTEER WORK), display "besides as {a job/volunteer work/a job or volunteer work}".

Otherwise, use null display.

If PA17 = 1 (WORKED FOR PAY) and PA19 = 1 (VOLUNTEER WORK), display "a job or volunteer work". Else if PA17 = 1 (WORKED FOR PAY), display "a job".

Else if PA19 = 1 (VOLUNTEER WORK), display "volunteer work".

**QUESTION TEXT:**

In the last month, {{besides as {a job/volunteer work/a job or volunteer work},} did {you/SP} ever provide care for or look after an adult or child who cannot care for themselves?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | PA23 |
| | REFUSED | PA23 |
| | DON'T KNOW | PA23 |

---

## PA22      **op5spcaredfr**      R5 PA22D SP CARED FOR PERSON

                                     **op5relatnshp**      R5 RELASHIP TO SP UPDATE AND NEW

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and

RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who was that ({you/he/she} provided care for or looked after)?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

| | | |
|---|---|---|
| PA22b. | [What is (his/her) first name?] | CONFIRM SPELLING |
| PA22c. | [What is (his/her) last name?] | CONFIRM SPELLING |
| PA22d. | [What is (his/her) relationship to {you/SP}?] | PRESS F1 FOR HELP SCREEN |

**CODES**

| | |
|---|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |

| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |
| 92 | OTHER NONRELATIVE |

**PROGRAMMER INSTRUCTIONS:**

If code 31 is selected, display hard error message "Relationship code 31 "Paid Aide/Housekeeper/Employee" cannot be selected here. Please confirm the relationship and select another relationship code."

If "SERVICE/SOMEONE FROM THE PLACE SP LIVES" is selected from the person roster, display hard error message ""SERVICE/SOMEONE FROM THE PLACE SP LIVES" cannot be selected here. Please confirm for whom SP provided care and select or add another person."

For each roster selection/addition at PA22, set PERSONSPCARESFOR flag = 1 (YES).

---

## PA23                     pa5evrgowalk              R5 PA23 EVER GO WALKING

**QUESTION TEXT:**

In the last month, did {you/SP} ever go walking for exercise?

**CODES**

| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## PA24                     pa5vigoractv              R5 PA24 EVER VIGOROUS ACTIVITIES

**QUESTION TEXT:**

In the last month, did {you/SP} ever spend time on vigorous activities that increased {your/his/her} heart rate and made {you/him/her} breathe harder? This includes things like working out, swimming, running or biking, or playing a sport.

**CODES**

| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

---

## BOX PA25              BOX PA25                    NOT ONFILE

If NEWSAMPLE flag = 1 (YES), go to PA25.
Else if DECEASED flag = 1 (YES) and (LAST INT PA25A = 95 (NO ACTIVITY LISTED INCLUDING R1 61s AND 64s)), go to Section CL – Closing.
Else if LAST INT PA25A = 95 (NO ACTIVITY LISTED), go to PA25.
Otherwise, go to PA25A.

---

## PA25                     pa5dfavact               R5 D FAVORITE ACTIVITY AT R5

**DISPLAY INSTRUCTIONS:**

Display PA25, PA25A, PA26 and PA26A on the same screen.

**QUESTION TEXT:**

> Thinking about all the activities {you do/SP does} these days, what is {your/his/her} favorite activity? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.
>
> IF SP HAS NO FAVORITE ACTIVITY, ENTER 95.

**ENTER TEXT**

LENGTH                                50

---

| **BOX PA25A** | BOX PA25A | NOT ONFILE |
|---|---|---|

> If PA25 = 95, go to Section RH – Rehabilitation.
> Otherwise, go to PA26.

---

| **PA25a** | **pa5dofavact** | R5 PA25A GET TO DO FAV ACT LST YR |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

Display PA25, PA25A, PA26 and PA26A on the same screen.

If DECEASED flag = 1 (YES), display "Between the last interview in {LAST INT MONTH AND YEAR} and the time of {SP}'s death in {MONTH AND YEAR OF DEATH}, did {he/she} get to do this".

Otherwise, display, "Since the last interview in {LAST INT MONTH AND YEAR}, {have you/has SP} done {R1 INT PA25 TEXT}"

For "LAST INT PA25 TEXT" display text response from LAST INT PA25.

**QUESTION TEXT:**

> During an earlier interview, we learned that {your/{SP}'s} favorite activity was { R1 INT PA25 TEXT }.
>
> {Since the last interview in {LAST INT MONTH AND YEAR}, {have you/has SP} done { R1 INT PA25 TEXT }/Between the last interview in {LAST INT MONTH AND YEAR} and the time of {SP}'s death in {MONTH AND YEAR OF DEATH}, did {he/she} get to do this}?

**CODES**

| 1 | YES |
|---|---|
| 2 | NO |
|  | REFUSED |
|  | DON'T KNOW |

---

| **BOX PA26** | BOX PA26 | NOT ON FILE |
|---|---|---|

> If DECEASED flag = 1 (YES), go to Section CL - Closing.
> Otherwise, go to PA26.

---

| **PA26** | **pa5helmfvact** | R5 PA26 HEALTH LIMIT FAV ACTIVITY MONTH |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

Display PA25, PA25A, PA26 and PA26A on the same screen.

Display "month" in underlined text.

**QUESTION TEXT:**

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX PA27 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

# PA26A          **pa5fvactlimyr**          R5 PA26A HEALTH LIMIT FAV ACTIVITY YEAR

**DISPLAY INSTRUCTIONS:**

Display PA25, PA25A, PA26 and PA26A on the same screen.

Display "year" in underlined text.

**QUESTION TEXT:**

In the last year, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# BOX PA27          **BOX PA27**          NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to Section RH – Rehabilitation.
Else if LAST INT PA25A = 95 (NO ACTIVITY LISTED), go to Section RH – Rehabilitation.
Otherwise, go to PA27.

---

# PA27          **pa5fvactstill**          R5 PA27 STILL FAVORITE ACTIVITY

**DISPLAY INSTRUCTIONS:**

Display PA27, PA27A, PA28 and PA28A on the same screen.

For "R1 INT PA25 TEXT" display text response from R1 INT PA25.

**QUESTION TEXT:**

Is {R1 INT PA25 TEXT} still your favorite activity or do you have a new one?  It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

**CODES**

| | | |
|---|---|---|
| 1 | STILL FAVORITE ACTIVITY | Section RH |
| 2 | HAS A NEW FAVORITE ACTIVITY | |
| 95 | NO FAVORITE ACTIVITY | Section RH |
| | REFUSED | Section RH |
| | DON'T KNOW | Section RH |

---

# PA27A          **PA27A**          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display PA27, PA27A, PA28 and PA28A on the same screen.

**QUESTION TEXT:**

Thinking about all the activities {you do/SP does} these days, what is {your/his/her} favorite activity? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

ENTER FAVORITE ACTIVITY

**ENTER TEXT**

Length                                                      50

---

# PA28                      **pa5actnwlim**            R5 PA28 HEALTH LIMIT NEW FAV ACTIVITY MONTH

**DISPLAY INSTRUCTIONS:**

Display PA27, PA27A, PA28 and PA28A on the same screen.

Display "month" in underlined text.

**QUESTION TEXT:**

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

**CODES**

| | | |
|---|---|---|
| 1 | YES | Section RH |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

---

# PA28A                     **pa5actnwlim**            R5 PA28A HEALTH LIMIT NEW FAV ACTIVITY YEAR

**DISPLAY INSTRUCTIONS:**

Display PA27, PA27A, PA28 and PA28A on the same screen.

Display "year" in underlined text.

**QUESTION TEXT:**

In the last year, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section RH - Rehabilitation

---

**Derived Variables From Items in PA Section**

| | |
|---|---|
| **pa5dfavact** | R5 D FAVORITE ACTIVITY AT R5 |
| **pa1dv2favact** | R1 D VERSION 2 FAVORITE ACTIVITY |

---

**RH1**  rh5rehab  R5 RH1 RECEIVED REHAB IN LAST YEAR

**DISPLAY INSTRUCTIONS:**
Display "last year" in underlined text.

**QUESTION TEXT:**

Physical rehabilitation or "rehab" services can help you improve function and the ability to carry out daily activities.  Services include physical therapy, occupational therapy, and speech therapy.  Rehab can be received in different settings. For instance, while you are staying in the hospital, after a hospital stay in a nursing home or rehab facility, at a doctor's or therapist's office or clinic, or at home.

In the last year, {have you/has SP} received any rehab services?

**CODES**

| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX RH1**  BOX RH1  NOT ON FILE

If RH1=1 (YES) go to RH1A.

Otherwise, go to Section SD – Smoking.

---

**RH1A**  rh5rehabmo  R5 RH1A MONTHS OF REHAB

**DISPLAY INSTRUCTIONS:**
Display "last year" in underlined text.

**QUESTION TEXT:**

In the last year, for about how many months altogether did {you/SP} receive rehab services?

Was it for less than one month, one to three months, four to five months, or six or more months?

**CODES**

| 1 | LESS THAN 1 MONTH | |
| 2 | 1 TO 3 MONTHS | RH2 |
| 3 | 4 TO 5 MONTHS | RH2 |
| 4 | 6 OR MORE MONTHS | RH2 |
| | REFUSED | RH2 |
| | DON'T KNOW | RH2 |

---

**RH1B**  rh5rehabweek  R5 RH1B WEEKS OF REHAB

**DISPLAY INSTRUCTIONS:**
Display "last year" in underlined text.

In the last year, for about how many weeks altogether did {you/SP} receive rehab services?  Was it less than

one week, one to two weeks, or three to four weeks?

CODES

| | |
|---|---|
| 1 | LESS THAN 1 WEEK |
| 2 | 1 TO 2 WEEKS |
| 3 | 3 TO 4 WEEKS |
| | REFUSED |
| | DON'T KNOW |

---

## RH2      rh5rehabsur      R5 RH2 REHAB POST SURGERY

**DISPLAY INSTRUCTIONS:**
Display "last year" in underlined text.

**QUESTION TEXT:**

We are interested in the reasons {you/SP} received rehab in the last year.

Did {you/SP} receive rehab to help {you/him/her} recover following surgery?

CODES

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | RH4 |
| | REFUSED | RH4 |
| | DON'T KNOW | RH4 |

---

## RH3      rh5surgcond      R5 RH3 MAIN MED CONDITION FOR SURGERY

**DISPLAY INSTRUCTIONS:**
Display "main medical condition" in underlined text.

**QUESTION TEXT:**

SHOW CARD RH3/4

Please look at this card and tell me, what was the main medical condition for which {you/SP} had surgery?

CODES

| | | |
|---|---|---|
| 1 | A FRACTURE, SPRAIN, OR INJURY | RH5 |
| 2 | A HIP, KNEE OR OTHER JOINT REPLACEMENT | RH5 |
| 3 | ANOTHER MUSCULOSKELETAL CONDITION | RH5 |
| 4 | A STROKE OR TIA | RH5 |
| 5 | A HEART ATTACK | RH5 |
| 6 | ANOTHER HEART CONDITION OR VASCULAR DISEASE | RH5 |
| 7 | A BREATHING CONDITION | RH5 |
| 8 | A NEUROLOGICAL CONDITION LIKE MS OR PARKINSON'S | RH5 |
| 9 | CANCER | RH5 |
| 94 | ANOTHER CONDITION (SPECIFY) | |
| 95 | NO MEDICAL CONDITION (IF VOLUNTEERED) | RH5 |
| | REFUSED | RH5 |
| | DON'T KNOW | RH5 |

## RH3B

NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER MEDICAL CONDITION TARGETED BY SURGERY

**ENTER TEXT**

LEGNTH                                          50

**PROGRAMMER INSTRUCTIONS:**

Go to RH5.

---

## RH4                    **rh5rehabcond**         R5 RH4 MAIN MED CONDITION FOR REHAB

**DISPLAY INSTRUCTIONS:**

Display "main medical condition" in underlined text.

**QUESTION TEXT:**

SHOW CARD RH3/4

Please look at this card and tell me, what was the main medical condition for which {you/SP} received rehab in the last year?

**CODES**

| | | |
|---|---|---|
| 1 | A FRACTURE, SPRAIN, OR INJURY | RH5 |
| 2 | A HIP, KNEE OR OTHER JOINT REPLACEMENT ANOTHER | RH5 |
| 3 | MUSCULOSKELETAL CONDITION | RH5 |
| 4 | A STROKE OR TIA | RH5 |
| 5 | A HEART ATTACK | RH5 |
| 6 | ANOTHER HEART CONDITION OR VASCULAR DISEASE | RH5 |
| 7 | A BREATHING CONDITION | RH5 |
| 8 | A NEUROLOGICAL CONDITION LIKE MS OR PARKINSON'S | RH5 |
| 9 | CANCER | RH5 |
| 94 | ANOTHER CONDITION (SPECIFY) | RH5 |
| 95 | NO MEDICAL CONDITION (IF VOLUNTEERED) | |
| | REFUSED | RH5 |
| | DON'T KNOW | RH5 |
| | | RH5 |

---

## RH4B                    **RH4B**              NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER MEDICAL CONDITION

**ENTER TEXT**

LEGNTH                                          50

---

## RH5          **rh5funcback**        R5 RH5 IMPROVE FUNCTION IN BACK

**rh5funchips**        R5 RH5 IMPROVE FUNCTION IN HIPS

**rh5funcknees**       R5 RH5 IMPROVE FUNCTION IN KNEES

**rh5funcfeet**        R5 RH5 IMPROVE FUNCTION IN FEET

**rh5funchands**       R5 RH5 IMPROVE FUNCTION IN HANDS

| rh5funcwrist | R5 RH5 IMPROVE FUNCTION IN WRIST |
| rh5funcshold | R5 RH5 IMPROVE FUNCTION IN SHOULDERS |
| rh5funchead | R5 RH5 IMPROVE FUNCTION IN HEAD |
| rh5funcneck | R5 RH5 IMPROVE FUNCTION IN NECK |
| rh5funcarms | R5 RH5 IMPROVE FUNCTION IN ARMS |
| rh5funclegs | R5 RH5 IMPROVE FUNCTION IN LEGS |
| rh5funcstom | R5 RH5 IMPROVE FUNCTION IN STOMACH |
| rh5funcmouth | R5 RH5 IMPROVE FUNCTION IN MOUTH |
| rh5funcheart | R5 RH5 IMPROVE FUNCTION IN HEART |
| rh5funclungs | R5 RH5 IMPROVE FUNCTION IN LUNGS (From Other Specify) |
| rh5funcos | R5 RH5 IMPROVE FUNCTION OTHER SPECIFY |
| rh5funcnotsp | R5 RH5 IMPROVE FUNCTION NO SPECIFIC PLACE |

Display "where" in underlined.

**QUESTION TEXT:**

SHOW CARD RH5

Next, please look at this card and tell me where {you were/SP was} trying to improve function?

PROBE:  Anywhere else?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | BACK | RH6 |
| 2 | HIP(S) | RH6 |
| 3 | KNEES(S) | RH6 |
| 4 | FEET | RH6 |
| 5 | HAND(S) | RH6 |
| 6 | WRIST(S) | RH6 |
| 7 | SHOULDER(S) | RH6 |
| 8 | HEAD | RH6 |
| 9 | NECK | RH6 |
| 10 | ARM(S) | RH6 |
| 11 | LEG(S) | RH6 |
| 12 | STOMACH | RH6 |
| 13 | MOUTH OR THROAT | RH6 |
| 14 | HEART | RH6 |
| 94 | OTHER PLACES (SPECIFY) | RH6 |
| 95 | NO SPECIFIC PLACE (IF VOLUNTEERED) | |
| | REFUSED | RH6 |
| | DON'T KNOW | RH6 |

---

**RH5A**　　　　　　　　RH5A　　　　　　　　NOT ON FILE

SPECIFY OTHER BODY STRUCTURES TARGETED BY THERAPY

**ENTER TEXT**

Length                                                                50

---

## RH6

| | | |
|---|---|---|
| | **rh5impchew** | R5 RH6 IMPROVE CHEWING SWALLOWING |
| | **rh5impspeak** | R5 RH6 IMPROVE SPEAKING BEING UNDERSTOOD |
| | **rh5impspain** | R5 RH6 IMPROVE PAIN LEVEL |
| | **rh5impbreath** | R5 RH6 IMPROVE BREATHING |
| | **rh5impbweak** | R5 RH6 IMPROVE STRENGTH |
| | **rh5impmove** | R5 RH6 IMPROVE MOVEMENT RANGE OF MOTION |
| | **rh5impenergy** | R5 RH6 IMPROVE ENERGY LEVEL |
| | **rh5impbal** | R5 RH6 IMPROVE BALANCE COORDINATION |
| | **rh5impfall** | R5 RH6 IMPROVE PROBLEMS WITH FALLS |
| | **rh5impmemory** | R5 RH6 IMPROVE MEMORY |
| | **rh5impnone** | R5 RH6 IMPROVE NONE OF THESE PROBLEMS |

**DISPLAY INSTRUCTIONS:**

Display "which of these problems" in underlined text.

**QUESTION TEXT:**

SHOW CARD RH6

Next, please look at this card and tell me which of these problems {were you/was SP} trying to improve?

PROBE: Any others?

SELECT ALL THAT APPLY

**CODES**

| | |
|---|---|
| 1 | DIFFICULTY CHEWING OR SWALLOWING |
| 2 | DIFFICULTY SPEAKING OR BEING UNDERSTOOD |
| 3 | PAIN LEVEL |
| 4 | PROBLEM WITH BREATHING |
| 5 | PROBLEM WITH STRENGTH (MUSCLE WEAKNESS) |
| 6 | PROBLEM WITH MOVEMENT (RANGE OF MOTION) |
| 7 | LOW ENERGY LEVEL |
| 8 | PROBLEM WITH BALANCE OR COORIDNATION |

| | | |
|---|---|---|
| 9 | PROBLEM WITH FALLS | |
| 10 | PROBLEM WITH MEMORY | |
| 95 | NONE OF THESE PROBLEMS | |
| | REFUSED | |
| | DON'T KNOW | |

---

## RH6B

| | | |
|---|---|---|
| | **rh5impbed** | R5 RH6B IMPROVE GETTING OUT OF BED |
| | **rh5impwalk** | R5 RH6B IMPROVE WALKING INSIDE HOME |
| | **rh5impleave** | R5 RH6B IMPROVE LEAVING HOME OUTSIDE |
| | **rh5impdistnc** | R5 RH6B IMPROVE WALKING DISTANCES OUTSIDE |
| | **rh5impclimb** | R5 RH6B IMPROVE CLIMBING STAIRS |
| | **rh5impdrive** | R5 RH6B IMPROVE DRIVING |
| | **rh5imptransp** | R5 RH6B IMPROVE USING OTHER TRANSPORTATION |
| | **rh5impnotths** | R5 RH6B IMPROVE NONE OF THESE MOBIL ACT |

**DISPLAY INSTRUCTIONS:**
Display "which of these" in underlined text.

**QUESTION TEXT:**

SHOW CARD RH6B

Sometimes rehab focuses on improving ways of moving or getting around.  Please look at this card and tell me which of these {were you/was SP} trying to improve?

PROBE:  Any others?

SELECT ALL THAT APPLY

| CODES | **Code All That Apply** |
|---|---|
| 1 | GETTING OUT OF BED |
| 2 | WALKING AROUND INSIDE AT HOME |
| 3 | LEAVING HOME TO GO OUTSIDE |
| 4 | WALKING DISTANCES OUTSIDE (SEVERAL BLOCKS) |
| 5 | CLIMBING STAIRS |
| 6 | DRIVING |
| 7 | USING OTHER FORMS OF TRANSPORTATION |
| 95 | NONE OF THESE |
| | REFUSED |
| | DON'T KNOW |

---

## RH6C

| | | |
|---|---|---|
| | **rh5impsc** | R5 RH6C IMPROVE CARING FOR SELF |
| | **rh5imphh** | R5 RH6C IMPROVE HOUSEHOLD ACTIVITIES |
| | **rh5impcomp** | R5 RH6C IMPROVE USING COMPUTER TABLET |
| | **rh5impwork** | R5 RH6C IMPROVE WORKING |

|  |  | VOLUNTEERING |
| --- | --- | --- |
|  | **rh5impcare** | R5 RH6C IMPROVE PROVIDING CARE |
|  | **rh5impactiv** | R5 RH6C IMPROVE PARTICIPATING ACTIVITIES |
|  | **rh5impactnon** | R5 RH6C IMPROVE NONE OF THESE ACTIVITIES |

**DISPLAY INSTRUCTIONS:**
Display "which of these" in underlined text.

**QUESTION TEXT:**

SHOW CARD RH6C

Sometimes rehab focuses on improving the ability to carry out specific activities.  Please look at this card and tell me which of these activities {were you/was SP} trying to improve?

PROBE:  Any others?

SELECT ALL THAT APPLY

**CODES**

| 1 | CARING FOR SELF (WASHING UP, TOILETING, DRESSING, EATING) |
| --- | --- |
| 2 | HOUSEHOLD TASKS (SHOPPING FOR GROCERIES, PREPARING MEALS, DOING LAUNDRY) |
| 3 | USING A COMPUTER, LAPTOP OR TABLET |
| 4 | WORKING OR VOLUNTEERING |
| 5 | PROVIDING CARE TO SOMEONE ELSE |
| 6 | PARTICIPATING IN SOCIAL, RELIGIOUS, OR COMMUNITY ACTIVITIES |
| 95 | NONE OF THESE ACTIVITIES |
|  | REFUSED |
|  | DON'T KNOW |

---

| **RH6D** | **rh5devcane** | R5 RH6D THERAPIST RECOMMEND CANE WALKER |
| --- | --- | --- |
|  | **rh5devwhlch** | R5 RH6D THERAPIST RECOMMEND WHEELCHR SCOOTER |
|  | **rh5devramp** | R5 RH6D THERAPIST RECOMMEND ENTRANCE RAMP |
|  | **rh5devstair** | R5 RH6D THERAPIST RECOMMEND STAIR LIFT GLIDE |
|  | **rh5devtub** | R5 RH6D THERAPIST RECOMMEND GRABBAR TUB SEAT |
|  | **rh5devtoil** | R5 RH6D THERAPIST RECOMMEND GRABBAR TOIL SEAT |
|  | **rh5deveat** | R5 RH6D THERAPIST RECOMMEND ADAPTED UTENSIL |
|  | **rh5devdres** | R5 RH6D THERAPIST RECOMMEND DRESSING DEV |
|  | **rh5devgrab** | R5 RH6D THERAPIST RECOMMEND REACHER GRABBER |
|  | **rh5devcomp** | R5 RH6D THERAPIST RECOMMEND COMPUTER DEVICE |

**rh5devcar**

**rh5devother**

R5 RH6D THERAPIST RECOMMEND CAR
DEVICE
R5 RH6D THERAPIST RECOMMEND OTHER
CHANGES

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

If STRUCTURE flag = 2 (MULTI-UNIT) and HO2=1 (COMMON OR SHARED ENTRANCE), do not display RH6D3.

If STRUCTURE flag = 2 (MULTI-UNIT) or HO5=1 (ONE FLOOR), do not display RH6D4.

If HO11A= 2 (NO BATHTUB) and HO11B = 1 (YES, SHOWER STALL), display "shower" in RH6D5.
Else if HO11a = 1 (YES, BATHTUB) and HO11b = 2 (NO SHOWER STALL), display "tub area" in RH6D5.
Otherwise, display "shower or tub area" in RH6D5.

If DROVEINLASTYEAR flag <> 1 (YES), use null display in RH6D11.
Otherwise, display "or {drive/drives}" in RH6D11.

If at RH6D1, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}Rehab therapists sometimes recommend devices or equipment to make activities easier, safer or so patients can do them on their own.

In the last year did any of {your/SP's} therapists recommend…{]}

{variable text [a – I]}

RESPONSE [1] a.  a cane or walker?
RESPONSE [2] b.  a wheelchair or scooter?
RESPONSE [3] c.  a ramp at the entrance to {your/SP's} home?
RESPONSE [4] d.  a stair lift or stair glide?
RESPONSE [5] e.  a grab bar or seat in the {{shower} or {tub area}}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks. A seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

RESPONSE [6] f.  grab bars or a raised seat for the toilet?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

RESPONSE [7] g.  adapted utensils to help with eating or cutting up food?
RESPONSE [8] h.  special items to help with dressing such as buttonhooks or clothes that are designed to get on and off easily?
RESPONSE [9] i.  a reacher or grabber to pick up things more easily?
RESPONSE [10] j.  adaptive devices for a computer, laptop or tablet?
RESPONSE [11] k.  adaptive devices for the car that {you ride /SP rides} in{ or {drive/drives}}?
RESPONSE [12] l.  other changes to the home environment to help with daily tasks?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |

DON'T KNOW

---

**RH7**                              **rh5place1**          R5 RH7A RECEIVE REHAB OVERNIGHT HOSP
                                                            NH REHAB
                                     **rh5place2**          R5 RH7B RECEIVE REHAB OUTPATIENT

                                     **rh5place3**          R5 RH7C RECEIVE REHAB HOME

                                     **rh5place4**          R5 RH7D RECEIVE REHAB SOMEWHERE ELSE

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

Display "where" in underlined text.

If at RH7A, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}Next, we are interested in where {you/SP} received rehab services in the last year.

In the last year, did {you/SP} receive rehab … {]}

RESPONSE [1] a.  as an overnight patient in a hospital, nursing home, or rehab facility?
RESPONSE [2] b.  at an outpatient center, clinic, or doctor's or therapist's office?
RESPONSE [3] c.  at home?
RESPONSE [4] d.  somewhere else?

**CODES**
1              YES
2              NO
               REFUSED
               DON'T KNOW

---

**BOX RH7E**                 **BOX RH7E**               NOT ON FILE

If RH7D=1 (YES) go to RH7E.
Otherwise, go to Box RH8.

---

**RH7E**                     **rh5place5**              R5 RH7E RECEIVE REHAB OTHER SPECIFY
                                                        PLACE TYPE
**QUESTION TEXT:**
SPECIFY WHERE SP RECEIVED REHAB

**ENTER TEXT**
                   LENGTH                                                50

---

**BOX RH8**                  **BOX RH8**                NOT ON FILE

If more than one item at RH7A-D = 1 (YES), go to RH8.
Otherwise, go to RH9.

---

**RH8**                      **rh5placelast**           R5 RH8 PLACE LAST RECEIVED REHAB

Display "last" in underlined text.

If RH7A = 1 (YES), display "as an overnight patient in a hospital, nursing home, or rehab facility" and response option 1. OVERNIGHT PATIENT IN HOSPITAL, NURSING HOME, OR REHAB FACILITY.

If RH7B = 1 (YES), display "at an outpatient center, clinic, or doctor's or therapists office" and response option 2. OUTPATIENT CENTER, CLINIC, DOCTOR'S OR THERAPISTS OFFICE.

If RH7C = 1 (YES), display "at home" and response option 3. HOME.
If RH7D = 1 (YES), display "at {TEXT FROM RH7E}" and response option 4. SOMEWHERE ELSE.

Display "or" between places received services.

**QUESTION TEXT:**

Which place did {you/SP} last receive these services? Was it {as an overnight patient in a hospital, nursing home, or rehab facility/at an outpatient center, clinic, or doctor's or therapists office/at home/at {TEXT FROM RH7E}}?

**CODES**

| | |
|---|---|
| 1 | OVERNIGHT PATIENT IN HOSPITAL, NURSING HOME, OR REHAB FACILITY |
| 2 | OUTPATIENT CENTER, CLINIC, DOCTOR'S OR THERAPISTS OFFICE |
| 3 | HOME |
| 4 | SOMEWHERE ELSE |
| | REFUSED |
| | DON'T KNOW |

---

# RH9        rh5ability        R5 RH9 FUNCTIONING IMPROVE IN REHAB

**QUESTION TEXT:**

While {you were/SP was} receiving rehab services in the last year, did {your/his/her} functioning and ability to do activities improve, get worse, or stay about the same?

**CODES**

| | | |
|---|---|---|
| 1 | IMPROVED | |
| 2 | GOT WORSE | RH9B |
| 3 | STAYED ABOUT THE SAME | RH10 |
| 4 | VARIED/UP AND DOWN (IF VOLUNTEERED) | RH10 |
| | REFUSED | RH10 |
| | DON'T KNOW | RH10 |

---

# RH9A        rh5abilimp        R5 RH9A HOW MUCH FUNCTIONING IMPROVE IN REHAB

**QUESTION TEXT:**

Did it improve a lot, somewhat, or a little?

**CODES**

| | |
|---|---|
| 1 | A LOT |
| 2 | SOMEWHAT |
| 3 | A LITTLE |

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**
Go to RH10.

---

# RH9B                rh5abilworse                R5 RH9A HOW MUCH FUNCTIONING WORSE IN REHAB

**QUESTION TEXT:**
Did it get a lot worse, somewhat worse or a little worse?

**CODES**
| | |
|---|---|
| 1 | A LOT |
| 2 | SOMEWHAT |
| 3 | A LITTLE |
| | REFUSED |
| | DON'T KNOW |

---

# RH10                rh5rehabnow                R5 RH10 STILL RECEIVING REHAB

**DISPLAY INSTRUCTIONS:**
Display "still" in underlined text.

**QUESTION TEXT:**
{Are you/Is SP} still receiving rehab services?

**CODES**
| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# BOX RH11                BOX RH11                NOT ON FILE

If RH10=2 (NO) go to RH11.
Otherwise, go to Section SD – Smoking.

---

# RH11                rh5metgoals                R5 RH11 MET GOALS WHEN REHAB ENDED

**QUESTION TEXT:**
When {your/SP's} rehab services ended, had {you/SP} met all or most of {your/his/her} goals?

**CODES**
| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# RH12                rh5metinsur                R5 RH12 MET INSURANCE LIMIT WHEN REHAB ENDED

**QUESTION TEXT:**

When {your/SP's} rehab services ended, had {you/SP} met the limit of {your/{his/her}} insurance coverage?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# RH13        rh5abilnow        R5 RH13 FUNCTIONING IMPROVE WHEN REHAB ENDED

**QUESTION TEXT:**

Since {your/SP's} rehab services ended, have {your/his/her} functioning and ability to do activities improved, got worse, or stayed about the same?

**CODES**

| | | |
|---|---|---|
| 1 | IMPROVED | |
| 2 | GOT WORSE | RH15 |
| 3 | STAYED ABOUT THE SAME | Section SD |
| 4 | VARIED/UP AND DOWN (IF VOLUNTEERED) | Section SD |
| | REFUSED | Section SD |
| | DON'T KNOW | Section SD |

---

# RH14        rh5nowimp        R5 RH14 HOW MUCH FUNCTION IMPROVE AFTER REHAB

**QUESTION TEXT:**

Did it improve a lot, somewhat, or a little?

**CODES**

| | |
|---|---|
| 1 | A LOT |
| 2 | SOMEWHAT |
| 3 | A LITTLE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section SD – Smoking.

---

# RH15        rh5nowworse        R5 RH15 HOW MUCH FUNCTION WORSE AFTER REHAB

**QUESTION TEXT:**

Did it get a lot worse, somewhat worse, or a little worse?

**CODES**

| | |
|---|---|
| 1 | A LOT |

| 2 | SOMEWHAT |
| 3 | A LITTLE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
Go to Section SD – Smoking.

## SD1PRE                    SD1PRE                    NOT ON FILE

The next questions are about smoking cigarettes.

PRESS 1 AND ENTER TO CONTINUE

## SD1                    sd5smokedreg                    R5 SD1 SMOKED REGULARLY

**QUESTION TEXT:**

Did {you/SP} ever smoke cigarettes regularly, at least 1 cigarette a day?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION PE |
| | REFUSED | SECTION PE |
| | DON'T KNOW | SECTION PE |

## BOX SD2                    BOX SD2                    NOT ON FILE

If R1 SD1 (EVER SMOKED) = 1 (YES) or if NEWSAMPLE flag = 1 (YES, go to SD2.

Otherwise, go to SECTION PE - Performance.

## SD2                    sd5smokesnow                    R5 SD2 SMOKES NOW

**QUESTION TEXT:**

{Do you/Does SP} smoke cigarettes now?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## BOX SD3                    BOX SD3                    NOT ON FILE

If [SD2 = 1 (YES)] or if [NEWSAMPLE flag = 1 (YES) and SD2 = 2 (NO)], go to SD3.

Otherwise, go to Section PE.

## SD3                    sd5numcigday                    R5 SD3 NUM OF CIGARETTES PER DAY

**DISPLAY INSTRUCTIONS:**

IF SD2=1 (SMOKES NOW), DISPLAY "{do you/does SP}"
ELSE IF SD2=2 (DOES NOT SMOKE NOW), DISPLAY "{did you/did SP}"

**QUESTION TEXT:**

On average, how many cigarettes per day {{do you/does SP}/{did you/did SP}} usually smoke?

IF NEEDED: A pack contains 20 cigarettes.

ENTER # OF CIGARETTES
ENTER 999 IF SP SMOKES LESS THAN 1 CIGARETTE PER DAY

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 120 |
| Soft Range | 1 to 40 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

IF NUMBER ENTERED VIOLATES THE HARD RANGE (SD3<1 OR SD3>120) AND SD3 <>999 THEN DISPLAY ERROR MESSAGE #13 FROM THE GLOBAL SPEC.

---

| **BOX SD4** | **BOX SD4** | NOT ON FILE |
|---|---|---|

If NEWSAMPLE flag = 1 (YES), go to SD4.

Otherwise, go to Section PE.

---

| **SD4** | **sd5agesrtsmk** | R5 SD4 AGE STARTED SMOKING |
|---|---|---|

**QUESTION TEXT:**

How old {were you/was SP} when {you/he/she} first smoked cigarettes regularly?

ENTER AGE STARTED SMOKING

**ENTER NUMBER**

| | |
|---|---|
| Range | 6 to 70 |
| Soft Range | 12 to 35 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE STARTED SMOKING CANNOT BE GREATER THAN CURRENT AGE".

---

| **BOX SD5** | **BOXSD5** | NOT ON FILE |
|---|---|---|

IF SD2=1 (SMOKES NOW), GO TO SECTION PE - PERFORMANCE
ELSE GO TO SD5

---

| **SD5** | **sd5agelstsmk** | R5 SD5 AGE LAST SMOKED REGULARLY |
|---|---|---|

**QUESTION TEXT:**

How old {were you/was SP} when {you/he/she} last smoked cigarettes regularly?

ENTER AGE QUIT SMOKING

**ENTER NUMBER**

| | |
|---|---|
| Range | 6 to 102 |
| Soft Range | 25 to 80 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**
If age entered > SP AGE, display error message "INVALID RESPONSE. AGE LAST SMOKED CANNOT BE GREATER THAN CURRENT AGE".
If age entered < age entered at SD4, display error message "INVALID RESPONSE. AGE LAST SMOKED CANNOT BE LESS THAN AGE STARTED SMOKING".

GO TO SECTION PE – Performance.

## PE1PRE        PE1PRE         NOT ON FILE

Next I would like to ask {you/SP} to try to perform a few simple movements, that is to move {your/{his/her}} body in different ways. Before we start, I need to ask a few questions.

PRESS 1 AND ENTER TO CONTINUE

## PE1        pe5whhndsign        R5 PE1 HAND USE TO SIGN YOUR NAME

**QUESTION TEXT:**

Which hand {do you/does SP} use to sign {your/{his/her}} name?

**CODES**

| | |
|---|---|
| 1 | LEFT |
| 2 | RIGHT |
| 3 | BOTH |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE1 = 1, set LEFTHANDED flag = 1 (yes).
If PE1 = 2, set RIGHTHANDED flag = 1 (yes).
If PE1 = 3, set EITHERHANDED flag = 1 (yes).

## PE2        pe5surghdwrt        R5 PE2 HAVE SURGRY TO HAND WRIST

**DISPLAY INSTRUCTIONS:**

Display "in the last 3 months" in bold underlined text.

**QUESTION TEXT:**

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hand or wrist?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | PE4 |
| 3 | REFUSED | PE4 |
| | DON'T KNOW | PE4 |

## PE3        pe5surgyside        R5 PE3 WHICH SIDE WAS SURGERY

**QUESTION TEXT:**

Which side was that (surgery or serious injury on {your/SP's} hand or wrist)? Was it the left side or right side?

**CODES**

| | | |
|---|---|---|
| 1 | LEFT SIDE | |
| 2 | RIGHT SIDE | |
| 3 | BOTH SIDES | PE8 |
| | REFUSED | |

DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

If PE3 = 1 (left hand/wrist surgery), set LEFTGRIPTEST flag = 2 (no).
If PE3 = 2 (right hand/wrist surgery), set RIGHTGRIPTEST flag = 2 (no).
If PE3 = 3 (both hands/wrists surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

---

# PE4    **pe5flrupain**    R5 PE4 EXPER FLARE UP PAIN HAND

**DISPLAY INSTRUCTIONS:**

Display "currently" in bold underlined text.

**QUESTION TEXT:**

{Are you/Is SP} currently experiencing a flare-up of pain in either hand or wrist?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | PE6 |
| 3 | REFUSED | PE6 |
| | DON'T KNOW | PE6 |

---

# PE5    **pe5sideflrup**    R5 PE5 SIDE CURRNT FLARE UP PAIN

**DISPLAY INSTRUCTIONS:**

Display "current" in bold underlined text.

**QUESTION TEXT:**

Which side is that current flare-up of pain in {your/SP's} hand or wrist? Is it the left side or right side?

**CODES**

| | | |
|---|---|---|
| 1 | LEFT SIDE | |
| 2 | RIGHT SIDE | |
| 3 | BOTH SIDES | PE8 |
| | REFUSED | |
| | DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

If PE5 = 1 (left hand/pain flare up), set LEFTGRIPTEST flag = 2 (no).
If PE5 = 2 (right hand/pain flare up), set RIGHTGRIPTEST flag = 2 (no).
If PE5 = 3 (both hands/pain flare ups), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

---

# PE6    **pe5surgarmsh**    R5 PE6 SURGERY ARM OR SHOULDER

**DISPLAY INSTRUCTIONS:**

Display "In the last 3 months" in bold underlined text.

**QUESTION TEXT:**

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} arm or shoulder

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | PE8 |
| | REFUSED | PE8 |

---

**PE7**                    **pe5sidsurgar**            R5 PE7 SIDE SURGERY ARM OR SHLDR

**QUESTION TEXT:**

Which side was that (surgery or serious injury on {your/SP's} arm or shoulder)? Was it the left side or right side?

**CODES**

| | |
|---|---|
| 1 | LEFT SIDE |
| 2 | RIGHT SIDE |
| 3 | BOTH SIDES |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE7 = 1 (left arm/shoulder surgery), set LEFTGRIPTEST flag = 2 (no).
If PE7 = 2 (right arm/shoulder surgery), set RIGHTGRIPTEST flag = 2 (no).
If PE7 = 3 (both arms/shoulders surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

---

**PE8**                    **pe5surgyhips**            R5 PE8 SURG HIPS IN CLUD REPLCMNT

**DISPLAY INSTRUCTIONS:**

Display "In the last 3 months" in bold underlined text.

**QUESTION TEXT:**

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hips (including hip replacement surgery)?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX PE11 |
| | REFUSED | BOX PE11 |
| | DON'T KNOW | BOX PE11 |

---

**PE9**                    **pe5sidhipsrg**            R5 PE9 SIDE WAS HIP SURGERY ON

**QUESTION TEXT:**

Was that (surgery or serious injury on {your/SP's} hips) only on one side or on both sides?

**CODES**

| | |
|---|---|
| 1 | ONE SIDE |
| 2 | BOTH SIDES |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE9 = 2 (both hips surgery), set CHAIRSTANDS flag = 2 (no).

---

**BOX PE11**               **BOX PE11**                NOT ON FILE

If MO24 = 1 (always uses mobility device to get out of bed) or MO26 = 4 (never got out of bed by self), go

to PE11.

Otherwise go to BOX PE13.

---

**PE11**                    **pe5stndwhold**            R5 PE11 STAND WITHOUT HOLDING ON

**DISPLAY INSTRUCTIONS:**

Display "stand without holding onto anyone or anything" in bold underlined text.

**QUESTION TEXT:**

For a few of the body movements, I will ask {you/SP} to stand without holding onto anyone or anything. I can help {you/{him/her}} get up if {you/{he/she}} would like me to. {Are you/Is SP} able to try this?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE11 = 2 (not able to stand without holding on to anyone/anything), set BALANCESTANDS flag = 2 (no).

---

**BOX PE12**                **BOX PE12**                NOT ON FILE

If CHAIRSTANDS flag = 2 (NO), go to PE13.
Otherwise, go to PE12.

---

**PE12**                    **pe5upchbyslf**            R5 PE12 GET UP OUT CHAIR BY SELF

**DISPLAY INSTRUCTIONS:**

Display "without" and "by {yourself/{himself/herself}}" in bold underlined text.
If CANE flag = 1 (yes) or WALKER flag = 1 (yes), display "and without {your/{his/her}} {cane/walker/cane or walker}".

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".
If WALKER flag = 1 (yes) and CANE flag is null, display "walker".
If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

**QUESTION TEXT:**

I will also ask {you/SP} to get up out of a chair by {yourself/{himself/herself}} {and without {your/{his/her}} {cane/walker/cane or walker}}. {Are you/Is SP} able to try this?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE12 = 2 (unable to try getting up from chair without mobility devices/help), set CHAIRSTANDS flag = 2 (no).

---

**BOX PE13**                **BOX PE13**                NOT ON FILE

If MO15 = 1 (used wheelchair every time to get around home/building) or MO16 = 1 (used scooter every time to get around home/building) set WALKING COURSE flag = no (2) and go to PE14.

---

## PE13          pe5wlkdsself          R5 PE13 WALK SHORT DIST BY SELF

**DISPLAY INSTRUCTIONS:**

Display "walk a short distance in this room by {yourself/{himself/herself}}" in bold underlined text.

If MO13 = 1,2,3, or 4 (used cane every time, most times, sometimes, or rarely when walking around inside) or MO14 = 1,2,3, or 4 (used walker every time, most times, sometimes, or rarely when walking around inside), display "{You/{He/She}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance."

If MO13 = 1,2,3, or 4 and MO14 ≠ 1,2,3, or 4, display "cane".
If MO14 = 1,2,3, or 4 and MO13 ≠ 1,2,3, or 4, display "walker".
If MO13 = 1,2,3, or 4 and If MO14 = 1,2,3, or 4, display "cane or walker".

**QUESTION TEXT:**

I will (also) be asking {you/SP} to walk a short distance in this room by {yourself/{himself/herself}}. {{{You/{He/She}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance.} {Are you/Is SP} able to try this?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

If PE13 = 2 (unable to walk short distance), set WALKINGCOURSE flag = 2 (no).

---

## PE14          PE14          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "ACTIVITIES TO SET UP AND DEMONSTRATE" in bolded text.

Display grid with 7 rows and 3 columns.
In R1C1, use null display.
In R1C2, display "ACTIVITY" in bolded text.
In R1C3, display "ADMINISTER" in bolded text.

In R2C1, display "1.".
In R2C2, display "BALANCE STANDS".
In R2C3, if BALANCESTANDS flag = 2 (no), set BALANCESTANDSELIG flag = 2 (NO), and display "NO".
Otherwise, set BALANCESTANDSELIG flag = 1 (YES), and display "YES".

In R3C1, display "2.".
In R3C2, display "WALKING COURSE".
In R3C3, if WALKINGCOURSE flag = 2 (no), set WALKINGCOURSELIG flag = 2 (NO), and display "NO".
Otherwise, set WALKINGCOURSELIG flag = 1 (YES), and display "YES".

In R4C1, use null display.
In R4C2, use null display. In R4C3:
If WALKINGCOURSELIG flag = 1 (YES) and [MO13 = 2, 3, or 4 (used cane most times, sometimes, or rarely inside) or MO14 = 2, 3, or 4 (used walker most times, sometimes, or rarely inside)], set AIDUSAGE flag = 2 (SOMETIMES), and display "B. SOMETIMES USES CANE/WALKER AROUND HOME".

Else, if WALKINGCOURSELIG flag = 1 (YES) and [MO13 = 1 (used cane every time inside) or MO14 = 1 (used walker

        

every time inside)], set AIDUSAGE flag = 3 (ALWAYS), and display "C. ALWAYS USES CANE/WALKER AROUND HOME".

Otherwise, if WALKINGCOURSELIG flag = 1 (YES), set AIDUSAGE flag = 1 (NEVER), and display "A. DOESN'T USE CANE/WALKER AROUND HOME".

In R5C1, display "3.".
In R5C2, display "CHAIR STANDS".
In R5C3, if CHAIRSTANDS flag = 2 (no), set CHAIRSTANDSELIG flag = 2 (NO), and display "NO".
Otherwise, set CHAIRSTANDSELIG flag = 1 (YES), and display "YES".

In R6C1, display "4.".
In R6C2, display "GRIP STRENGTH".
In R6C3:
If LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag=2 (no), set GRIPSTRENGTHELIG flag = 3 (NO), and display "NO".
Else if LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag NE 2 (no), set GRIPSTRENGTHELIG flag = 1 (YES RIGHT), and display "YES RIGHT".

Else if LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag=2 (no), set GRIPSTRENGTHELIG flag = 2 (YES LEFT), and display "YES LEFT".

Else if [LEFTGRIPTEST flag NE 2 (NO) and RIGHTGRIPTEST flag NE 2 (no)] and [LEFTHANDED flag = 1 (YES)], set GRIPSTRENGTHELIG flag = 2 (YES LEFT), and display "YES LEFT".
Otherwise, set GRIPSTRENGTHELIG flag = 1 (YES RIGHT), and display "YES RIGHT".

Display "TRANSFER INFORMATION TO FRONT PAGE OF ACTIVITIES BOOKLET"
Display "AFTER ACTIVITIES ARE COMPLETED, PRESS 1 AND ENTER TO CONTINUE"

**QUESTION TEXT:**

ACTIVITIES TO SET UP AND DEMONSTRATE

| | ACTIVITY | ADMINISTER |
|---|---|---|
| 1. | BALANCE STANDS | {YES/NO} |
| 2. | WALKING COURSE | {YES/NO} |
| | | {A. DOESN'T USE CANE/WALKER AROIUND HOME/ |
| | | B. SOMETIMES USES CANE/WALKER AROUND HOME/ |
| | | C. ALWAYS USES CANE/WALKER AROUND HOME} |
| 3. | CHAIR STANDS | {YES/NO} |
| 4. | GRIP STRENGTH | {YES RIGHT/YES LEFT/NO} |

TRANSFER INFORMATION TO FRONT PAGE OF ACTIVITIES BOOKLET

AFTER ACTIVITES ARE COMPLETED, PRESS 1 AND ENTER TO CONTINUE

---

# PE15                    PE15                    NOT ON FILE

**QUESTION TEXT:**

REMEMBER TO AFFIX SP ID LABEL AND WRITE YOUR INTERVIEWER ID AND DATE ON ACTIVITIES BOOKLET COVER.

PRESS 1 AND ENTER TO CONTINUE

**PROGRAMMER INSTRUCTIONS:**

Go to Section HW – Height & Weight

---

| Flag Variables Set in PE Section | |
|---|---|
| **fl5lefthand** | R5 F PE CAN SP DO LEFT HAND TEST |
| **fl5righthand** | R5 F PE CAN SP DO RGT HAND TEST |
| **fl5eiherhand** | R5 F PE CAN SP DO EITHR HAND TST |
| **fl5lftgrptst** | R5 F PE CAN SP DO LFT GRIP TEST |
| **fl5rhtgrptst** | R5 F PE CAN SP DO RIGHT GRIP TEST |
| **fl5charstnds** | R5 F PE CAN SP DO CHAIR STANDS |
| **fl5balstands** | R5 F PE CAN SP DO BALANCE STANDS |
| **fl5wlkingrse** | R5 F PE CAN SP DO WALKING COURSE |

Date: ☐☐ / ☐☐ / 2 0 1 ☐
m m   d d   y y y y

Interviewer ID: N H A T ☐☐☐

# National Health and Aging Trends Study

# Activities Booklet

**nhats**

56797

## ACTIVITIES TO SET UP AND DEMONSTRATE

Transfer information from laptop screen.  Mark administration for each activity "YES" or "NO" and copy to the administration box on the page listed for each activity.

| ACTIVITY | ADMINISTER | | PAGE |
|---|---|---|---|
| 1.  BALANCE STANDS | ☐ YES | ☐ NO | 4 |
| 2.  WALKING COURSE | ☐ YES | ☐ NO | 16 |

⬇

☐ WA3a.  Doesn't use cane/walker around home
☐ WA3b.  Sometimes uses cane/walker around home    } 17
☐ WA3c.  Always uses cane/walker around home

| ACTIVITY | ADMINISTER | | PAGE |
|---|---|---|---|
| 3.  CHAIR STANDS | ☐ YES | ☐ NO | 22 |
| 4.  GRIP STRENGTH | ☐ YES **RIGHT**<br>☐ YES **LEFT** | ☐ NO | 28 |
| 5.  WAIST CIRCUMFERENCE | *YES* | | 34 |
| 6.  PEAK AIR FLOW | *YES* | | 38 |

56797

## GENERAL INSTRUCTIONS

➤ *Administer activities in the order presented in booklet*

➤ *Read/say **bold blue text** to SP EXACTLY as written*

➤ *Check that SP is wearing appropriate shoes (tennis shoes or shoes with less than 1-inch heels, but not slippers).  If not, request SP to change shoes or put shoes on*

➤ *Check lighting to see if adequate for SP to see.  If not, ask if there is a light you can turn on*

➤ *Identify place for SP to sit while watching you demonstrate activities*

56797

## GENERAL INSTRUCTIONS

|     |     |
| --- | --- |
| HRS | MINS |

☐ AM
☐ PM

**Now I would like to ask you to try to perform a few simple movements, that is to move your body in different ways.**

**For each movement, I will first describe it and show it to you.  Then I'd like you to try to do it.**

**If you feel it would be unsafe to try it, tell me, and we'll move on to the next one.**

**Do you have any questions before we begin?**

56797

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# BALANCE STANDS

*Balance Stands Administration:*

|  | BA1 |
|---|---|
| ☐ YES ⬇ | ☐ NO   GO TO **WALKING COURSE** p.16 ➡ |

> ➤ *Clear space for balance stands activity*
> ➤ *Get out stopwatch*

56797

## SIDE BY SIDE STAND

> *Reset stopwatch to 0:00'00"00*

**Now I'll show you the first movement.**

> *Demonstrate with inside edges of your feet touching at the heels and toes*

**I want you to try to stand with your feet together, side-by-side, for about 10 seconds. You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Try to hold this position until I tell you to stop.**

**Do you think it would be safe to try this?**

BA2

| ☐ YES  ⬇ | ☐ NO | GO TO **BA3** ☒ 3. Not attempted ➡ |
|---|---|---|
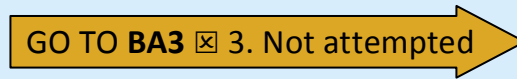
*Help SP into position:*
> *Support SP's elbow with one hand while standing slightly behind and to the side*
> *Hold stopwatch behind SP's back*
> *Check SP's feet position*

**Are you ready?**

| YES  ⬇ | NO | GO TO **BA3** ☒ 3. Not attempted ➡ |
|---|---|---|

**Ready, begin.**
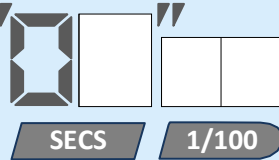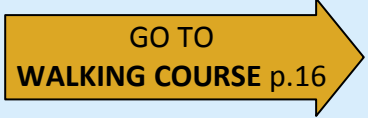
> *Start stopwatch*
> *Remove support hand*
> *Step back half a step. Keep your hands near SP's elbow and back*

*After 10 seconds if SP is still holding position, say:*

**Stop.**

56797

# SIDE BY SIDE STAND — RESULTS

BA3

| ☐ 1. COMPLETED, HELD FOR 10 SEC | ☐ 2. ATTEMPTED, NOT HELD FOR 10 SEC | ☐ 3. NOT ATTEMPTED |

BA4 / BA5

**SEMI-TANDEM**
Next Page

**Time held:**

`0` `[ ]` `[ ][ ]`

SECS   1/100

GO TO
**WALKING COURSE** p.16

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

GO TO
**WALKING COURSE** p.16

56797

# SEMI-TANDEM STAND

➤ *Reset stopwatch to 0:00'00"00*

**Now I'll show you the second movement.**

➤ *Demonstrate with inside edge of one foot touching the big toe of the other*

**I want you to try to stand with the side of the heel of one foot touching the big toe of the other foot for about 10 seconds. You may put either foot in front, whichever is more comfortable for you.**

**You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Again, try to hold this position until I tell you to stop.**

**Do you think it would be safe to try this?**

BA6

| ☐ YES ⬇ | ☐ NO  GO TO **BA7** ☒ 3. Not attempted ➤ |
|---|---|

*Help SP into position:*
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position*

**Are you ready?**

| *YES* ⬇ | *NO*  GO TO **BA7** ☒ 3. Not attempted ➤ |
|---|---|

**Ready, begin.**
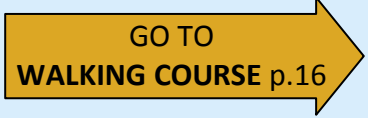
➤ *Start stopwatch*
➤ *Remove support hand*
➤ *Step back half a step. Keep your hands near SP's <u>elbow</u> and <u>back</u>*

*After 10 seconds if SP is still holding position, say:*

**Stop.**

56797

# SEMI-TANDEM STAND — RESULTS

BA7

| ☐ 1. COMPLETED, HELD FOR 10 SEC | ☐ 2. ATTEMPTED, NOT HELD FOR 10 SEC | ☐ 3. NOT ATTEMPTED |
|---|---|---|

BA8

BA9

**FULL TANDEM**
Next Page

**Time held:**

'0[ ][ ]"

SECS   1/100

GO TO
**WALKING COURSE** p.16

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

GO TO
**WALKING COURSE** p.16

56797

## FULL TANDEM STAND

➤ *Reset stopwatch to 0:00'00"00*

**Now I'll show you the third movement.**

➤ *Demonstrate with heel of one foot in front of and touching toes of the other*

**I want you to try to stand with the heel of one foot in front of and touching the toes of the other foot for about 10 seconds. You may put either foot in front, whichever is more comfortable for you.**

**You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Try to hold this position until I tell you to stop.**

**Do you think it would be safe to try this?**

BA10

| ☐ YES ⬇ | ☐ NO   GO TO **BA11** ☒ 3. Not attempted ➡ |
|---|---|

*Help SP into position:*
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position*

**Are you ready?**

| *YES* ⬇ | *NO*   GO TO **BA11** ☒ 3. Not attempted ➡ |
|---|---|

**Ready, begin.**

➤ *Start stopwatch*
➤ *Remove support hand*
➤ *Step back half a step. Keep your hands near SP's <u>elbow</u> and <u>back</u>*

*After 10 seconds if SP is still holding position, say:*

**Stop.**

56797
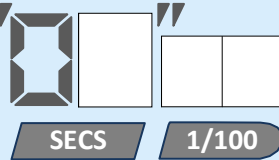
# FULL TANDEM STAND — RESULTS

| | | |
|---|---|---|
| ☐ 1. COMPLETED, HELD FOR 10 SEC | ☐ 2. ATTEMPTED, NOT HELD FOR 10 SEC | ☐ 3. NOT ATTEMPTED |

BA11

BA12 | BA13

**ONE LEG EYES OPEN**
Next Page

**Time held:**

`0` ☐ ☐☐

SECS     1/100

**GO TO
WALKING COURSE p.16**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

**GO TO
WALKING COURSE p.16**

56797

## ONE LEG STAND EYES OPEN

➤ *Reset stopwatch to 0:00'00"00*

**Now I'll show you the fourth movement.**

➤ *Demonstrate with one leg raised a few inches off the ground*

**I want you to try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can. I will stop you at 30 seconds.**

**You may use your arms, bend your knees, or move your body to keep your balance. Try not to move the foot on which you are standing and try not to let your legs touch each other. Try to hold this position until I tell you to stop. If you feel you are losing your balance take a step. I'll hold you up until you feel stable.**

**Do you think it would be safe to try this?**

BA14

| ☐ YES ⬇ | ☐ NO | GO TO **BA15** ☒ 3. Not attempted ➡ |
|---|---|---|

*Help SP into position:*
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position: 1 foot raised*

**Are you ready?**

| *YES* ⬇ | *NO* | GO TO **BA15** ☒ 3. Not attempted ➡ |
|---|---|---|

**Ready, begin.**

➤ *Start stopwatch*
➤ *Remove support hand*
➤ *Step back half a step. Keep your hands near SP's <u>elbow</u> and <u>back</u>*

*After 30 seconds if SP is still holding position, say:*

**Stop.**

56797

# ONE LEG STAND EYES OPEN — RESULTS

BA15

| | | |
|---|---|---|
| ☐ 1. COMPLETED, HELD FOR 30 SEC | ☐ 2. ATTEMPTED, NOT HELD FOR 30 SEC | ☐ 3. NOT ATTEMPTED |

BA16 BA17

**ONE LEG EYES CLOSED**
Next Page

**Time held:**

☐☐ SECS  ☐☐ 1/100

**GO TO WALKING COURSE p.16**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

**GO TO WALKING COURSE p.16**

56797

## ONE LEG STAND EYES CLOSED

➤ *Reset stopwatch to 0:00'00"00*

**Now I'll show you the last of these movements.**

➤ *Demonstrate with eyes closed and one leg raised a few inches off the ground*

**This time I want you to close your eyes and try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches.  Stand for as long as you can.  I will stop you at 30 seconds.**

**You may use your arms, bend your knees, or move your body to keep your balance.  Try not to move the foot on which you are standing and try not to let your legs touch each other.  Try to hold this position until I tell you to stop.  If you feel you are losing your balance take a step.  I'll hold you up until you feel stable.**

**Do you think it would be safe to try this?**

BA18

| ☐ YES ⬇ | ☐ NO  GO TO **BA19** ☒ 3. Not attempted ➡ |
|---|---|

**Please close your eyes.  When you are ready, lift one leg off the ground a few inches.  I will not let go until you say you are ready.**

*Help SP into position:*
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position: 1 foot raised and eyes closed*

**Are you ready?**

| *YES* ⬇ | *NO*  GO TO **BA19** ☒ 3. Not attempted ➡ |
|---|---|

**Ready, begin.**

➤ *Start stopwatch*
➤ *Remove support hand*
➤ *Step back half a step. Keep your hands near SP's <u>elbow</u> and <u>back</u>*

*After 30 seconds if SP is still holding position, say:*

**Stop.**

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# ONE LEG STAND EYES CLOSED — RESULTS

BA19

| 1. COMPLETED, HELD FOR 30 SEC | 2. ATTEMPTED, NOT HELD FOR 30 SEC | 3. NOT ATTEMPTED |
|---|---|---|

**WALKING COURSE**
Next Page

BA20

**Time held:**

SECS    1/100

**WALKING COURSE**
Next Page

BA21

**Reasons not attempted:**
**Mark all that apply**

1. SP felt unsafe

2. Proxy felt unsafe for SP

3. You felt unsafe for SP/SP unsteady with support

4. SP unable to understand directions

9. Other, specify:

**WALKING COURSE**
Next Page

56797

15

56797

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# WALKING COURSE

*Walking Course Administration:*

- ➤ *Get out walking course chain & masking tape*
- ➤ *Look for appropriate space for course (16' x 3'), you may need to use a hallway or nearby room*
- ➤ *Find as smooth a surface as possible to lay out the course. Avoid high-pile carpet*
- ➤ *Do not lay course out over the edge of a rug, a throw rug, or any irregular surface*
- ➤ *Clear any obstacles from activity area (move small furniture, only with permission)*

*Is there an appropriate space to set up the walking course?*

- ➤ *Lay out chain straight down center of course area. Tape each end to the floor*
- ➤ *Using an arm's length of masking tape, place tape lengths under the two colored links of chain*
- ➤ *Untape chain from floor, leaving only taped start and finish lines*

Walking Course

56797
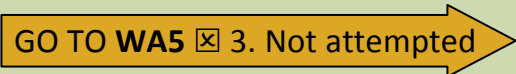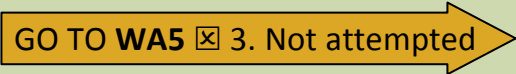
**This is our walking course. I want you to walk to the other end of the course at your usual speed, just as if you were walking down the street to go to the store. Walk all the way past the other end of the tape before you stop. I will walk with you.**
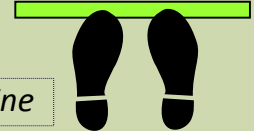
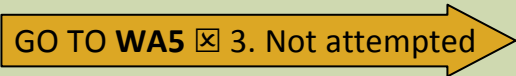➤ *Demonstrate starting from start line and walking completely past end line*

WA3

| WA3a ☐ | **Do you think it would be safe to try this?** |
|---|---|
| | ☐ YES  GO TO ✱  ☐ NO  GO TO **WA5** ☒ 3. Not attempted |

| WA3b ☐ | **Do you think it would be safe to try this <u>without</u> a cane or walker?** |
|---|---|
| | ☐ YES  GO TO ✱  ☐ NO  ASK **WA3c** |

| WA3c ☐ | **You may use a cane or walker if you need to. Do you think it would be safe to try this?** |
|---|---|
| | ☐ YES  GO TO ✱  ☐ NO  GO TO **WA5** ☒ 3. Not attempted |

✱ *Help SP into position:*
➤ *Stand slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position: both feet on start line*

**When I want you to start, I will say "Ready, begin."**

| *YES* | *NO*  GO TO **WA5** ☒ 3. Not attempted |
|---|---|

**Ready, begin.**

➤ *Start stopwatch when either of SP's feet <u>moves</u>*
➤ *Walk slightly <u>behind</u> and <u>to the side</u> of SP*
➤ *Stop timing when one of SP's feet <u>completely</u> crosses end line*

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# WALKING COURSE 1 — RESULTS

WA4

**Aid used:**

☐ 1. None

☐ 2. Cane

☐ 3. Walker or rollator

☐ 9. Other, specify: _____

WA5

☐ 1. COMPLETED  ☐ 2. ATTEMPTED  ☐ 3. NOT ATTEMPTED

| WA6 | | WA7 |
|---|---|---|

**WA6**

**Completion time:**

☐☐ . ☐☐

SECS  1/100

⬇

**WALKING COURSE 2**
Next Page

➡ **GO TO CHAIR STANDS** p.22

**WA7**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 5. No appropriate space

☐ 9. Other, specify:

_____

➡ **GO TO CHAIR STANDS** p.22

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## WALKING COURSE 2

➤ *Reset stopwatch to 0:00'00"00*

**Now I want you to repeat the walk.  Remember to walk at your usual pace, and go all the way past the tape at the other end of the course.**

*Help SP into position:*
➤ *Stand slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position: both feet on start line*
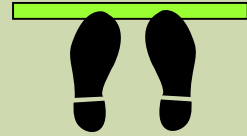
**When I want you to start, I will say "Ready, begin."**

| YES ⬇ | NO | GO TO **WA9** ☒ 3. Not attempted ➡ |
|---|---|---|

**Ready, begin.**

➤ *Start stopwatch when either of SP's feet <u>moves</u>*
➤ *Walk slightly <u>behind</u> and <u>to the side</u> of SP*
➤ *Stop timing when one of SP's feet <u>completely</u> crosses end line*

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WA8

**Aid used:**

☐ 1. None

☐ 2. Cane

☐ 3. Walker or rollator

☐ 9. Other, specify: _____

WA9

| ☐ 1. COMPLETED | ☐ 2. ATTEMPTED | ☐ 3. NOT ATTEMPTED |
|---|---|---|

WA10

**Completion time:**

☐☐ . ☐☐

SECS | 1/100

⬇

**CHAIR STANDS**
Next Page

⬇

**CHAIR STANDS**
Next Page

WA11

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

_____

⬇

**CHAIR STANDS**
Next Page

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Walking Course

56797

# CHAIR STANDS

*Chair Stands Administration:*

> ➤ *Look for appropriate chair(s) for activity (<u>hard back</u> and preferably <u>no arms</u>), you may need to look in a hallway or nearby room*
> ➤ *An SP in a wheelchair can use it as a chair if SP can get up from it without help*

*Is there an appropriate chair available?*

> ➤ *Place chair for SP with its back against a wall or other solid vertical surface*
> ➤ *Get out measuring tape*
> ➤ *When measuring chair height, ignore plush removable cushions, and always round down to nearest inch*

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## SINGLE CHAIR STAND

**Next I'm going to ask you to stand up, keeping your arms folded across your chest. I want you to fold your arms across your chest and sit so that your feet are on the floor. Then, I'll ask you to stand up, keeping your arms folded across your chest.**

*Demonstrate standing from a seated position with your arms folded across your chest*
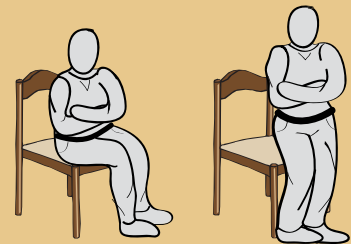
**Do you think it would be safe to try this?**

CH3

| ☐ YES ⬇ | ☐ NO | GO TO **CH7** ☒ 3. Not attempted ➡ |
|---|---|---|

- ➤ *Check SP's chair is secure against wall*
- ➤ *Stand in front of SP*
- ➤ *Check SP's position: sitting with arms folded over chest*

**Are you ready?**

| YES ⬇ | NO | GO TO **CH7** ☒ 3. Not attempted ➡ |
|---|---|---|

**Stand.**

CH4

| ☐ NOT COMPLETED ⬇ | ☐ COMPLETED | GO TO **CH5** Record chair height ➡ |
|---|---|---|

**Let's try again, this time using your arms.**

- ➤ *Check SP's position: sitting*

**Are you ready?**

- ➤ *Confirm SP is ready*

**Stand.**

Chair Stands

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# SINGLE CHAIR STAND — RESULT

**CH5**

**Chair Height:**

☐☐ INCHES

**CH6**

☐ WHEELCHAIR USED

**CH7**

☐ 1. COMPLETED   ☐ 2. ATTEMPTED   ☐ 3. NOT ATTEMPTED

**CH8**

**Arm Use:**

☐ 1. With arms

☐ 2. Without arms

→ GO TO **GRIP STRENGTH** p.28

↓

**REPEATED CHAIR STANDS**
Next Page

→ GO TO **GRIP STRENGTH** p.28

**CH9**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 5. No appropriate chair

☐ 9. Other, specify:

→ GO TO **GRIP STRENGTH** p.28

Chair Stands

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# REPEATED CHAIR STANDS

**Now, I'm going to ask you to do the same movement, but this time as QUICKLY as you can 5 times without stopping in between. After standing up each time, sit back down and then stand up again. Remember to keep your arms folded across your chest. I will count out loud as you stand "1, 2, 3, 4, 5" and time you with a stopwatch.**

> ➤ *Demonstrate standing from a seated position with your arms folded across your chest*
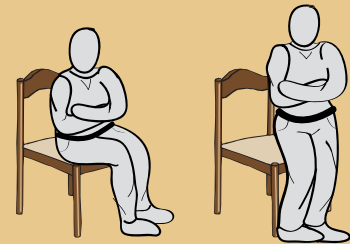
**Do you think it would be safe to try this?**

CH10

| ☐ YES ⬇ | ☐ NO | GO TO **CH12** ☒ 3. Not attempted ➡ |
|---|---|---|

> ➤ *Stand in front of SP*
> ➤ *Reset stopwatch to 0:00'00"00.*
> ➤ *Check SP's position: sitting with arms folded over chest*

**Are you ready?**

| *YES* ⬇ | *NO* | GO TO **CH12** ☒ 3. Not attempted ➡ |
|---|---|---|

**Stand.**

> ➤ *Start stopwatch*
> ➤ *Count the number of stands out loud (1, 2, 3, 4, 5) each time SP rises*

> ➤ *Stop timing when SP has stood up the 5th time*  GO TO **CH12** ☒ 1. Completed ➡

> ➤ *Stop timing if: SP uses his/her arms, has not completed 5 stands in 1 minute, or you become concerned for SP's safety*  GO TO **CH12** ☒ 2. Attempted ➡

*If SP becomes tired, short of breath, or stops before completing 5 stands, ask:*

**Can you continue?**

CH11

| ☐ YES ⬇ | ☐ NO | GO TO **CH12** ☒ 2. Attempted ➡ |
|---|---|---|

> ➤ *Continue counting & timing*

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**Chair Stands**

# REPEATED CHAIR STANDS — RESULTS

☐ 1. COMPLETED    ☐ 2. ATTEMPTED    ☐ 3. NOT ATTEMPTED

**CH13**

**Completion time:**

☐☐ . ☐☐

**SECS**    **1/100**

⬇

**GRIP STRENGTH**
Next Page

**CH14**

**# of stands completed:**

☐ 1   ☐ 2   ☐ 3   ☐ 4

**CH15**

**Reasons not completed:**
**Mark all that apply**

☐ 1. SP became tired or short of breath
☐ 2. SP used SP's arms

☐ 3. All stands not completed in 1 min
☐ 4. You were concerned for SP's safety
☐ 5. SP stopped and was unable to continue
☐ 9. Other, specify:

[ ]

⬇

**GRIP STRENGTH**
Next Page

**CH16**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support
☐ 4. SP unable to understand directions
☐ 9. Other, specify:

[ ]

⬇

**GRIP STRENGTH**
Next Page

Chair Stands

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Chair Stands

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# GRIP STRENGTH

*Grip Strength Administration:*

☐ YES **RIGHT**

☐ YES **LEFT**

☐ NO → GO TO **WAIST CIRCUMFERENCE** p.34

---

➤ *Remove the dynamometer from its case. If the display shows no numbers, press* **ON/OFF** *to turn on*

➤ *As marked in grip strength administration box, set "L" for left hand, or "R" for right hand. Press* **SELECT TEST** *until the correct letter appears*

➤ *Set the number of trials to 1. If needed, press* **# OF TRIALS** *until 1 appears*

➤ *Wipe dynamometer handle with an antibacterial cloth*

---

➤ *Make sure readings are displaying in KG*
➤ *If SP has a very large hand, you can adjust the grip position to 3*
➤ *If no numbers appear on the dynamometer display when you turn it on, check that the batteries are connected properly, and replace them if necessary*

**Grip Strength**

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# GRIP STRENGTH 1

**Next, I'm going to ask you to try to squeeze this handle using your (right/left) hand.**

> ➤ *Demonstrate grip position while sitting with your arm in an L shape, and the dynamometer or forearm resting on a stable surface*

**First, bend your elbow with your arm against your side. Then grab the two pieces of metal together like this and squeeze as hard as you can. The metal will not move, but the display will give me a measure of your grip. I will ask you to do this 2 times with the same hand. If you feel any pain or discomfort, tell me, and we will stop.**

**Do you think it would be safe to try this?**

**GR2**

| ☐ YES ⬇ | ☐ NO | GO TO **GR5** ☒ 3. Not attempted ➡ |
|---|---|---|

> ➤ *Press the "TEST" button and then hand dynamometer to SP*

**Please get in position, but don't squeeze until I say "begin." Hold the handle while you bend your elbow with your arm against your side.**

> ➤ *Check SP's position: sitting with arm in L shape*

**Are you ready?**

| *YES* ⬇ | *NO* | GO TO **GR3** ☒ Hand tested ➡ |
|---|---|---|

**Begin.**

*When SP begins squeezing, say:*

**Squeeze, squeeze, squeeze!**

*When the numbers on the display stop changing, say:*

**Stop.**

56797

# GRIP STRENGTH 1 — RESULTS

**GR3**

**Hand tested:**

☐ RIGHT

☐ LEFT

**GR4**

☐ GRIP POSITION SET TO 3

**GR5**

☐ 1. COMPLETED     ☐ 2. ATTEMPTED     ☐ 3. NOT ATTEMPTED

**GR6**

**Display reading:**

☐☐ . ☐ KG

⬇

**GRIP STRENGTH 2**
Next Page

→ GO TO **WAIST CIRCUMFERENCE** p.34

**GR7**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

[                    ]

→ GO TO **WAIST CIRCUMFERENCE** p.34

**Grip Strength**

56797
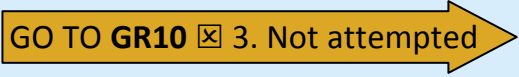
> ➤ *Press the "RESET" button to set display back to 0.0*
> ➤ *Press the "TEST" button and then hand dynamometer to SP*

**Now let's try a second time.  Remember to hold the handle while you bend your elbow and with your arm against your side, but don't squeeze until I say "begin."**

> ➤ *Check SP's position: sitting with arm in L shape*

**Are you ready?**

| YES ⬇ | NO | GO TO **GR10** ☒ 3. Not attempted ➡ |
|---|---|---|

**Begin.**

> *When SP begins squeezing, say:*

**Squeeze, squeeze, squeeze!**

> *When the numbers on the display stop changing, say:*

**Stop.**

Grip Strength

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# GRIP STRENGTH 2 — RESULTS

| GR8 | GR9 |
|---|---|
| **Hand tested:**<br>☐ RIGHT<br>☐ LEFT | ☐ GRIP POSITION SET TO 3 |

GR10

| ☐ 1. COMPLETED | ☐ 2. ATTEMPTED | ☐ 3. NOT ATTEMPTED |
|---|---|---|
| **GR11**<br><br>**Display reading:**<br>☐☐.☐ KG<br><br>⬇<br>**WAIST CIRCUMFERENCE**<br>Next Page | ⬇<br>**WAIST CIRCUMFERENCE**<br>Next Page | **GR12**<br><br>**Reasons not attempted:**<br>**Mark all that apply**<br><br>☐ 1. SP felt unsafe<br><br>☐ 2. Proxy felt unsafe for SP<br><br>☐ 3. You felt unsafe for SP/SP unsteady with support<br>☐ 4. SP unable to understand directions<br>☐ 9. Other, specify:<br><br>[              ]<br><br>⬇<br>**WAIST CIRCUMFERENCE**<br>Next Page |

Grip Strength

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Grip Strength

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# WAIST CIRCUMFERENCE

➤ *Wipe down flexible measuring tape with antibacterial cloth.*

➤ *Determine position for SP to perform activity:*

- *If SP can stand unassisted, perform activity with SP **standing up***
- *If SP cannot stand or has difficulty, perform activity with SP **sitting***
- *If SP cannot sit unassisted, perform activity with SP **lying down***

➤ *When administering activity, check that measuring tape:*

- *Is horizontal all the way around SP's waist*
- *Is lined up with SP's navel*
- *Is snug but not tight*
- *Has large numbers facing out*
- *Has end that starts with 1" overlapping end with higher numbers*

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# WAIST CIRCUMFERENCE
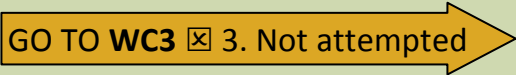
**Next I'm going to measure your waist circumference.  While standing up, I will ask you to place this soft measuring tape around your waist, over your clothing, holding it securely at the level of your navel or belly button.**

➤ *Demonstrate wrapping measuring tape around navel*

**Once the tape measure is in place, I will ask you to take a normal breath and exhale, holding your breath at the end of the exhale.  I will then record the measurement.**

**Do you think it would be safe to try this?**

WC1

| ☐ YES ⬇ | ☐ NO   GO TO **WC3** ☒ 3. Not attempted ➡ |
|---|---|

**Please point to your navel.  Now take this measuring tape and place it around your waist at the level of your navel.**

➤ *If SP cannot wrap measuring tape around waist by self, have SP hold one end at navel while you bring around other end, then hand to SP.*

**Please take a normal breath and exhale, holding your breath at the end of the exhale.**

➤ *Record measurement on the tape to the **nearest ¼ inch** after SP exhales*

**You can stop now.**

| ¼ | ½ | ¾ |
|---|---|---|
| .25 | .50 | .75 |

56797
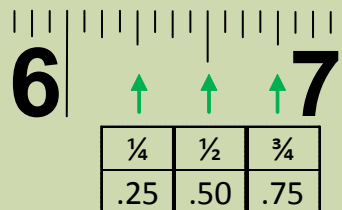
# WAIST CIRCUMFERENCE — RESULTS

**WC2**

**Measurement difficulties (mark all that apply):**

- ☐ 1. None
- ☐ 2. SP had breathing difficulties
- ☐ 3. SP unable to hold breath at end of exhale
- ☐ 4. SP gave less than full effort due to illness, pain, or other symptoms or discomfort
- ☐ 5. SP gave less than full effort for non-health reason
- ☐ 6. SP had difficulty or unable to locate navel
- ☐ 9. Other, specify: _____

**WC3**

| ☐ 1. COMPLETED | ☐ 2. ATTEMPTED | ☐ 3. NOT ATTEMPTED |

**WC4**

**Tape measure reading:**

☐☐ . ☐☐ INCHES

**WC5**

☐ Bulky clothing worn

**WC6**

**Measured by:**
☐ 1. You    ☐ 2. SP

**WC7**

**Activity position:**
- ☐ 1. Standing
- ☐ 2. Sitting
- ☐ 3. Lying down

⬇ **PEAK AIR FLOW**
Next Page

⬇ **PEAK AIR FLOW**
Next Page

**WC8**

**Reasons not attempted:**
**Mark all that apply**

- ☐ 1. SP felt unsafe
- ☐ 2. Proxy felt unsafe for SP
- ☐ 3. You felt unsafe for SP/SP unsteady with support
- ☐ 4. SP unable to understand directions
- ☐ 5. SP Refused
- ☐ 9. Other, specify:

⬇ **PEAK AIR FLOW**
Next Page

**Waist Circumference**

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Waist Circumference

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## PEAK AIR FLOW

➤ *Remove peak air flow meter from case and wipe with antibacterial cloth*
➤ *Attach interviewer cardboard mouthpiece to meter*

➤ *Determine position for SP to perform activity:*

- *If SP can stand unassisted, perform activity with SP **standing up***
- *If SP cannot stand or has difficulty, perform activity with SP **sitting***
- *If SP cannot sit unassisted, perform activity with SP **lying down***

➤ *Allow for **at least 30 seconds** between SP attempts*

➤ *When reading peak air flow meter, if the sliding marker falls between two hash marks, round **down** to the next number*

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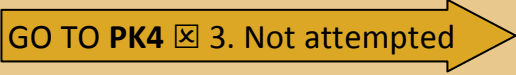
# PEAK AIR FLOW 1

**Now I'm going to ask you to perform a simple activity that will measure how fast you can push out air from your lungs. When you blow into this instrument, the value of the biggest, fastest "huff" of air will be recorded. It is important that you blow <u>as hard and as fast</u> as you can. I would like you to perform the activity 2 times.**

**When we are ready to begin, I'll ask you to get into position. Take as deep a breath as possible. Open your mouth and close your lips firmly around the outside of the mouthpiece, and then blow as hard and as fast as you can into the mouthpiece. Like this.**

➤ *Demonstrate activity position and movement*

**Do you think it would be safe to try this?**

PK1

☐ YES ⬇     ☐ NO  GO TO **PK4** ☒ 3. Not attempted ➡

➤ *Remove interviewer mouthpiece from meter*
➤ *Help SP into position, hand meter to SP*
➤ *Open sealed bag with SP mouthpiece*

**Please take this new mouthpiece out of the bag and fit it into the meter. Tap it lightly with the palm of your hand to make sure it is firmly attached.**

➤ *Check SP's position: mouthpiece attached, meter in hands, fingers clear of sliding marker and air holes*
➤ *Reset meter to 0*

**Please take a deep breath, place your lips around the outside of the mouthpiece, and blow as hard and as fast as you can into the mouthpiece.**

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## PEAK AIR FLOW 1 — RESULTS

PK2

**Activity position:**

☐ 1. Standing

☐ 2. Sitting

☐ 3. Lying down

PK3

**Effort given:**

☐ 1. Full effort

☐ 2. SP gave less than full effort due to illness, pain, or other symptoms or discomfort

☐ 3. SP gave less than full effort for non-health reason

PK4

| ☐ 1. COMPLETED | ☐ 2. ATTEMPTED | ☐ 3. NOT ATTEMPTED |
|---|---|---|

| PK5 | | PK6 |
|---|---|---|

**Meter reading:**

☐☐☐ L/MIN

⬇

**PEAK AIR FLOW 2**
Next Page

⬇

**PEAK AIR FLOW 2**
Next Page

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

[                    ]

➡ GO TO **CLOSING** p.44

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# PEAK AIR FLOW 2

➤ *Reset meter to 0*

**Now let's try a second time.  Again, place your lips around the outside of the mouthpiece, and blow as hard and as fast as you can into the mouthpiece.**

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# PEAK AIR FLOW 2 — RESULTS

**PK7**

**Activity position:**

☐ 1. Standing

☐ 2. Sitting

☐ 3. Lying down

**PK8**

**Effort given:**

☐ 1. Full effort

☐ 2. SP gave less than full effort due to illness, pain, or other symptoms or discomfort

☐ 3. SP gave less than full effort for non-health reason

**PK9**

☐ 1. COMPLETED  ☐ 2. ATTEMPTED  ☐ 3. NOT ATTEMPTED

**PK10**

**Meter reading:**

☐☐☐ L/MIN

⬇ **CLOSING** Next Page

⬇ **CLOSING** Next Page

**PK11**

**Reasons not attempted:**
**Mark all that apply**

☐ 1. SP felt unsafe

☐ 2. Proxy felt unsafe for SP

☐ 3. You felt unsafe for SP/SP unsteady with support

☐ 4. SP unable to understand directions

☐ 9. Other, specify:

⬇ **CLOSING** Next Page

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# CLOSING

Record end time:

|    |   | : |    |    | ☐ AM
|    |   |   |    |    | ☐ PM

HRS   MINS

Put away all equipment:

➤ *Remove SP mouthpiece from peak flow meter and put in trash bag*
➤ *Place peak flow meter and dynamometer in proper cases*
➤ *Remove all tape from floor*
➤ *Gather up all trash, put in bag*
➤ *Put all equipment in NHATS tote bag*
➤ *Return any borrowed chairs to original area*
➤ *Rearrange any moved furniture to original position*

GO TO **CAPI** ➤

56797

---

## HW1PRE                    **HW1PRE**                    NOT ON FILE

**QUESTION TEXT:**

> Now, I have a few questions about {your/SP's} height and weight.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## HW2                    **hw5currweigh**                    R5 HW2 YOU CURRENTLY WEIGH

**QUESTION TEXT:**

> How much {do you/does SP} currently weigh?
>
> ENTER WEIGHT IN POUNDS

**ENTER NUMBER**

| | |
|---|---|
| Range | 65 to 600 |
| Soft Range | 90 to 300 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 65-600.
Soft range: 90-300.

---

## BOX HW3                    **BOX HW3**                    NOT ON FILE

> If NEWSAMPLE flag=1 (YES), go to HW3.
>
> Otherwise, go to HW4.

---

## HW3                    **hw5weighat50**                    R5 HW3 WEIGH AT ABOUT AGE 50

**DISPLAY INSTRUCTIONS:**

Display "age 50" in bold underlined text.

**QUESTION TEXT:**

> What was {your/SP's} usual weight at about age 50? If you don't remember exactly, please make your best guess.
>
> ENTER WEIGHT IN POUNDS

**ENTER NUMBER**

| | |
|---|---|
| Range | 65 to 600 |
| Soft Range | 90 to 300 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 65-600.
Soft range: 90-300.

---

## HW4

**hw5lst10pnds**          R5 HW4 LOST 10 POUNDS IN LAST YR

**DISPLAY INSTRUCTIONS:**

Display "lost 10 or more pounds" in bold underlined text.

**QUESTION TEXT:**

{Have you/Has SP} lost 10 or more pounds in the last 12 months?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | HW7 |
| | REFUSED | HW7 |
| | DON'T KNOW | HW7 |

---

## HW5

**hw5trytolose**          R5 HW5 WERE YOU RYNG LOSE WEGHT

**QUESTION TEXT:**

{Were you/Was SP} trying to lose weight?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

## HW7

**hw5howtallft**          R5 HW7 HOW TALL ARE YOU FEET

**DISPLAY INSTRUCTIONS:**

Display HW7 and HW8 on the same screen.

**QUESTION TEXT:**

How tall {are you/is SP}?

ENTER HEIGHT IN FEET

**ENTER NUMBER**

| | |
|---|---|
| Range | 3 to 7 |
| Soft Range | 4 to 6 |
| REFUSED | BOX HW9 |
| DON'T KNOW | BOX HW9 |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 3-7.
Soft range: 4-6.

---

## HW8

**hw5howtallin**          R5 HW8 HOW TALL ARE YOU INCHES

**DISPLAY INSTRUCTIONS:**

Display HW7 and HW8 on the same screen.

**QUESTION TEXT:**

[How tall {are you/is SP}?]

ENTER HEIGHT IN INCHES

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to11 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range 0-11

---

**BOX HW9**  BOX HW9  NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HW9.

Otherwise, go to Section EL - Early Life.

---

**HW9**  hw5tal50feet  R5 HW9 TALL WOT SHOE AGE 50 FEET

**DISPLAY INSTRUCTIONS:**

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

**QUESTION TEXT:**

How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.

ENTER HEIGHT IN FEET

**ENTER NUMBER**

| | |
|---|---|
| Range | 3 to 7 |
| Soft Range | 4 to 6 |
| REFUSED | SECTION EL |
| DON'T KNOW | SECTION EL |

**PROGRAMMER INSTRUCTIONS:**

Hard range: 3-7.
Soft range: 4-6.

---

**HW10**  hw5tal50inch  R5 HW10 TALL WOUT SHOE 50 INCHES

**DISPLAY INSTRUCTIONS:**

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

**QUESTION TEXT:**

[How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.]

ENTER HEIGHT IN INCHES

**ENTER NUMBER**

Range                                    0 to 11
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range 0-11

Go to Section EL - Early Life

---

## BOX EL1PRE                **BOX EL1PRE**              NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to EL1PRE..
Otherwise, go to BOX EL11.

---

## EL1PRE                **EL1PRE**              NOT ON FILE

**QUESTION TEXT**

Now I want to ask a few questions about when {you were/SP was} younger.

PRESS 1 AND ENTER TO CONTINUE

---

## EL1                **el5borninus**              R5 EL1 WERE YOU BORN IN THE US

**QUESTION TEXT:**

{Were you/Was SP} born in the United States?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EL3 |
| | REFUSED | EL3 |
| | DON'T KNOW | EL3 |

---

## EL2                **el5stateborn (Restricted)**              R5 EL2 WHAT STATE WERE YOU BORN

**QUESTION TEXT:**

In what state {were you/was SP} born?

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND PRESS ENTER TO SELECT

| | |
|---|---|
| REFUSED | EL5 |
| DON'T KNOW | EL5 |

**PROGRAMMER INSTRUCTIONS:**

Use lookup file (59STATERR) of state names.
Display response label for state name selected.
All responses skip to EL5.

---

## EL3                **el5cntryborn (Restricted)**              R5 EL3 WHAT CONTRY WERE YOU BORN

**QUESTION TEXT:**

In what country {were you/was SP} born?

TYPE THE FIRST 3 LETTERS OF THE COUNTRY. THEN USE ARROW KEYS TO LOCATE COUNTRY, AND PRESS ENTER TO SELECT. IF COUNTRY IS NOT LISTED, SELECT 'NOT ON LIST'

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use the 'Country List' as lookup file.
Enable alphabetic search.
Display response label for country selected
If "NOT ON LIST SELECTED", go to EL3a.
Otherwise, go to EL4a.

---

# EL3A                    el5spbrcntry (Restricted)    R5 EL3A SPECIFY COUNTRY OF BIRTH

**QUESTION TEXT:**

SPECIFY COUNTRY OF BIRTH

ENTER TEXT

**ENTER TEXT**

Length                        50

---

# EL4A                    el5yrcametus (Restricted)    R5 EL4A YEAR CAME TO LIVE IN US

**QUESTION TEXT:**

In about what year did {you/SP} first come to live in the United States?

ENTER YEAR  [EL5]

**ENTER NUMBER**

REFUSED                        EL5
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Hard range  CURRENT YEAR – 110
Soft range CURRENT YEAR – 65

If year entered is ≤ SP BIRTH YEAR from IS6, display error message "INVALID RESPONSE.  YEAR CAME TO
UNITED STATES CANNOT BE EARLIER THAN SP BIRTH YEAR."

---

# EL4B                    el5agecomlus(restricted)     R5 EL4B  AGE CAME TO LIVE IN US

**QUESTION TEXT:**

At about what age did {you/SP} first come to live in the United States?

IF LESS THAN 1 YEAR OLD, ENTER 0

ENTER AGE

**ENTER NUMBER**

Range                        0 to 110
Soft Range                   0 to 65
REFUSED

DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Hard range 0-110
Soft range 0-65

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE CAME TO UNITED STATES CANNOT BE GREATER THAN CURRENT AGE."

---

**EL5**    el5hlthchild    R5 EL5 YOUR HELATH AS CHILD

**QUESTION TEXT:**

Thinking about when {you were/SP was} growing up, would you say that {you/his/her} health as a child was excellent, very good, good, fair, or poor?

**CODES**

| | |
|---|---|
| 1 | EXCELLENT |
| 2 | VERY GOOD |
| 3 | GOOD |
| 4 | FAIR |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

---

**EL6**    el5fingrowup    R5 EL6 WELL OFF FINANLY GROWG UP

**QUESTION TEXT:**

SHOW CARD EL1

How well off financially {was your/was SP's} family when {you were/{he/she} was} growing up? Was it well off, above average, average, below average, or poor?

**CODES**

| | |
|---|---|
| 1 | WELL OFF |
| 2 | ABOVE AVERAGE |
| 3 | AVERAGE |
| 4 | BELOW AVERAGE |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

---

**EL7**    el5lvbhpar15    R5 EL7 LIV W BTH PRNTS TO AGE 15

**DISPLAY NSTRUCTIONS:**

Display "both" in bold underlined text.

**QUESTION TEXT:**

Did {you/SP} live with both of {your/his/her} parents (birth or adopted) for most of {your/his/her} childhood up to the age of 15?

**CODES**

| 1 | YES | BOX EL9 |
| 2 | NO | |
| | REFUSED | BOX EL9 |
| | DON'T KNOW | BOX EL9 |

---

## EL8       el5lvwmofaor       R5 EL8 LIV W MOTHER FATHR OR OTH

**QUESTION TEXT:**

Did {you/SP} live with {your/his/her} mother only, {your/his/her} father only, another relative, or with non-relatives?

**CODES**

| 1 | MOTHER ONLY |
| 2 | FATHER ONLY |
| 3 | ANOTHER RELATIVE |
| 4 | NON-RELATIVES |
| 5 | VARIED/MOVED AROUND |
| | REFUSED |
| | DON'T KNOW |

---

## BOX EL9       BOXEL9       NOT ON FILE

If (EL1=2 (NO, BORN OUTSIDE THE U.S.), DK, or RF) and (EL4b>15 or (EL4a-SP'S BIRTH YEAR>15)), go to EL10.
Otherwise, go to EL9a.

---

## EL9A       el5lvctytn15 (Restricted)       R5 EL9A WHR LIV CITY/TOWN AGE 15

**QUESTION TEXT:**

Where did {you/SP} live when {you were/{he/she} was} age 15?

ENTER CITY/TOWN

CONFIRM SPELLING

**ENTER TEXT**

| Length | 25 |

---

## EL9B       el5stlivag15 (Restricted)       R5 EL9B STATE LIVED AT AGE 15

**QUESTION TEXT:**

[Where did {you/SP} live when {you were/{he/she} was} age 15?]

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND PRESS ENTER TO SELECT.

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use the lookup file (59STATERR) of state names.

Display response label for state name selected.

---

**EL10**                    **el5higstschl**              R5 EL10 HGHST DGREE SCOOL COMPLD

**QUESTION TEXT:**

SHOW CARD EL2

What is the highest degree or level of school {you/SP} completed?

**CODES**

1           NO SCHOOLING COMPLETED
2           1ST-8TH GRADE
3           9TH-12TH GRADE (NO DIPLOMA)
4           HIGH SCHOOL GRADUATE (HIGH SCHOOL
            DIPLOMA OR EQUIVALENT)
5           VOCATIONAL, TECHNICAL, BUSINESS, OR TRADE
            SCHOOL CERTIFICATE OR DIPLOMA (BEYOND
            HIGH SCHOOL LEVEL)
6           SOME COLLEGE BUT NO DEGREE
7           ASSOCIATE'S DEGREE
8           BACHELOR'S DEGREE
9           MASTER'S, PROFESSIONAL, OR DOCTORAL
            DEGREE
            REFUSED
            DON'T KNOW

---

**BOX EL11**                **BOXEL11**                   NOT ON FILE

If LAST INT EL11 = 2 (NO), RF, or DK, SET CURRENT INT EL11 = VALUE OF LAST INT and go to BOX EL12.
Else, if any HOUSEHOLD MEMBER RELATIONSHIP = 13 (MOTHER), set EL11=1 (YES) and go to BOX EL12.
Otherwise, go to EL11

---

**EL11**                    **el5mothalive**              R5 EL11 YOUR MOTHER STILL LIVING

**QUESTION TEXT:**

Is {your/SP's} mother still living?

**CODES**

1           YES
2           NO
            REFUSED
            DON'T KNOW

---

**BOX EL12**                **BOXEL12**                   NOT ON FILE

If LAST INT EL12 = 2 (NO), RF, or DK, SET CURRENT INT EL12 = VALUE OF LAST INT and go to Section NA
- Names.
Else, if any HOUSEHOLD MEMBER RELATIONSHIP = 16(FATHER), set EL12=1 (YES) and go to Section NA
– Names.
Otherwise go to EL12

---

**QUESTION TEXT:**

Is {your/SP's} father still living?

**CODES**

1          YES
2          NO
          REFUSED
          DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Go to Section NA – Names.

---

| Derived Variables from Items in EL Section | |
|---|---|
| **el5dsameres** | R5 D CITY STATE NOW AND AGE 15 |

## BOX NA1PRE          BOX NA1PRE          NOT ON FILE

If NEWSAMPLE flag=1 (YES) and [EL1 = 1 (BORN IN US) or EL4A ≤ 1940 (CAME TO US BY 1940) or [EL1 = 2 (BORN OUTSIDE US) and EL4A = DK or RF and EL4B <> DK, RF and (EL4B + SP YEAR OF BIRTH) <= 1940]] set INUS1940 flag = 1 (YES).

Else if R1 EL1 = 1 (BORN IN US) or R1 EL4A ≤ 1940 (CAME TO US BY 1940) or [R1 EL1 = 2 (BORN OUTSIDE US) and R1 EL4A = DK or RF and R1 EL4B <> DK, RF and (R1 EL4B + SP YEAR OF BIRTH) <= 1940] set INUS1940 flag = 1 (YES).

If [SP YEAR OF BIRTH <= 1939 or (SP YEAR OF BIRTH = 1940 and SP MONTH OF BIRTH = 1 (JANUARY), 2 (FEBRUARY) or 3 (MARCH))] and INUS1940 flag = 1 (YES), go to NA1PRE.

Otherwise, go to Section RL – Race, Ethnicity, and Language.

## NA1PRE          NA1PRE          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If SP YEAR OF BIRTH < 1940 display "{you/SP} turned {1940 – SP YEAR OF BIRTH}".

Else if SP YEAR OF BIRTH = 1940 display "{you were/SP was} born".

**QUESTION TEXT:**

We would like to get historic information that is available to the public from the Census about where {you/SP} grew up and {your/his/her} family circumstances. To do this, we have a few questions about where {you/SP} lived in 1940, that is the year {you /SP} turned {1940 – SP YEAR OF BIRTH}} / {you were/SP was} born}.

PRESS 1 AND ENTER TO CONTINUE

IF RESPONDENT REFUSES/DOESN'T KNOW, PRESS 7 AND ENTER

**CODES**

| | | |
|---|---|---|
| 1 | CONTINUE | |
| 7 | REFUSED/DON'T KNOW | Section RL |

## NA1          NA1          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in underlined text.

**QUESTION TEXT:**

In what state {were you/was SP} living in 1940?

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND

**ENTER TEXT**

Length                                        2

**PROGRAMMER INSTRUCTIONS:**

Use lookup file (59STATETERR) of state names.
Display state name response label.

---

## BOX NA2A                 BOX NA2A                      NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [EL7 = 1 (LIVED WITH BOTH PARENTS) or EL8 = 1 (LIVED WITH MOTHER ONLY)], go to NA2A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [R1 EL7 = 1 (LIVED WITH BOTH PARENTS) or R1 EL8 = 1 (LIVED WITH MOTHER ONLY)], go to NA2A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and EL8 = 2 (LIVED WITH FATHER ONLY), go to NA3A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and R1 EL8 = 2 (LIVED WITH FATHER ONLY), go to NA3A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and EL7 (LIVED WITH BOTH PARENTS) = DK, RF, go to NA4A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and R1 EL7 (LIVED WITH BOTH PARENTS) = DK, RF, go to NA4A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [EL8 = 3 (ANOTHER RELATIVE) or EL8 = 4 (NON-RELATIVES)], go to NA4A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [R1 EL8 = 3 (ANOTHER RELATIVE) or R1 EL8 = 4 (NON-RELATIVES)], go to NA4A.

Otherwise, go to NA4A.

---

## NA2A                      NA2A                      NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in underlined text.

Display NA2A and NA2B on the same screen.

**QUESTION TEXT:**

What was {your/SP's} mother's first name?

CONFIRM SPELLING

**Enter Text**

Length                                        45

REFUSED
DON'T KNOW

---

**NA2B**                    **NA2B**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "last" in underlined text.

**QUESTION TEXT:**

What was {your/SP's} mother's last name?

CONFIRM SPELLING

**Enter Text**
Length                                          25
REFUSED
DON'T KNOW

---

**BOX NA3A**                **BOX NA3A**                NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and [EL7 = 1 (LIVED WITH BOTH PARENTS) or EL8 = 2 (LIVED WITH FATHER ONLY)], go to NA3A.

Else if R1 EL7 = 1 (LIVED WITH BOTH PARENTS) or R1 EL8 = 1 (LIVED WITH FATHER ONLY), go to NA3A.

Otherwise, go to BOX NA4A.

---

**NA3A**                    **NA3A**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "first" in underlined text.

Display NA3A and NA3B on the same screen.

**QUESTION TEXT:**

What was {your/SP's} father's first name?

CONFIRM SPELLING

**Enter Text**
Length                                          45
REFUSED
DON'T KNOW

---

**NA3B**                    **NA3B**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "last" in underlined text.

**QUESTION TEXT:**

> What was {your/SP's} father's last name?
>
> CONFIRM SPELLING

**Enter Text**

| | |
|---|---|
| Length | 25 |
| REFUSED | |
| DON'T KNOW | |

---

## BOX NA4A                    BOX NA4A                    NOT ON FILE

> If (NA2A = NULL (NO MOTHER FIRST NAME), RF, or DK) and (NA3A = NULL (NO FATHER FIRST NAME), RF, or DK), go to NA4A.
>
> Otherwise, go to Box NA5.

---

## NA4A                    NA4A                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "first" in underlined text.

Display NA4A and NA4B on the same screen.

**QUESTION TEXT:**

> What was the first name of someone {you/SP} lived with in 1940?
>
> CONFIRM SPELLING
>
> ENTER 95 IF SP LIVED ALONE

**Enter Text**

| | |
|---|---|
| Length | 45 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

If NA4A=95 (SP LIVED ALONE), go to BOX NA5.

---

## NA4B                    NA4B                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "last" in underlined text.

Display NA4A and NA4B on the same screen.

**QUESTION TEXT:**

> What was that person's last name?
>
> CONFIRM SPELLING

**Enter Text**

        Length                                          25
        REFUSED
        DON'T KNOW

---

## BOX NA5           BOX NA5              NOT ON FILE

If (SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED), 2 (LIVING WITH PARTNER), 3 (SEPARATED), 4 (DIVORCED), 5 (WIDOWED), DK or RF) and SP GENDER from PERSON ROSTER = 2 (FEMALE), go to NA5.

Otherwise, go to Section RL – Race, Ethnicity, and Language.

---

## NA5           NA5              NOT ON FILE

**DISPLAY INSTRUCTIONS:**

If NA2B or NA3B <> NULL, display "And just to confirm, what".

Otherwise, display "What".

If SP YEAR OF BIRTH < 1940 display "{you/SP} turned {1940 - SP YEAR OF BIRTH}".

Else if SP YEAR OF BIRTH = 1940 display "{you were/SP was} born".

**QUESTION TEXT:**

{And just to confirm, what/What} was {your/SP's} last name in 1940, that is, the year {{you/SP} turned {1940 - SP YEAR OF BIRTH}/{you were/SP was} born}?

IF NOT PREVIOUSLY CONFIRMED, CONFIRM SPELLING.

**Enter Text**

        Length                                          25

**PROGRAMMER INSTRUCTIONS:**

Go to Section RL – Race, Ethnicity, and Language.

---

---

**BOX RL1PRE**                  **BOX RL1PRE**                          NOT ON FILE

> If NEWSAMPLE flag = 1 (YES), go to RL1PRE.
> Otherwise, go to Section VA - Veteran's Status

---

**RL1PRE**                      **RL1PRE**                              NOT ON FILE

**QUESTION TEXT**

> Now we'd like to ask you some questions about {your/SP's} race and ethnic background.
>
> PRESS 1 AND ENTER TO CONTINUE

---

**RL1**              **rl5yourrace1 (Sensitive)**      R5 RL1 RACE OF SP WHITE
                     **rl5yourrace2 (Sensitive)**      R5 RL1 RACE OF SP AFRICN AMERICN
                     **rl5yourrace3 (Sensitive)**      R5 RL1 RACE OF SP AMERICN INDIAN
                     **rl5yourrace4 (Sensitive)**      R5 RL1 RACE OF SP ALASKA NATIVE
                     **rl5yourrace5 (Sensitive)**      R5 RL1 RACE OF SP ASIAN
                     **rl5yourrace6 (Sensitive)**      R5 RL1 RACE OF SP NATIVE HWAIIAN
                     **rl5yourrace7 (Sensitive)**      R5 RL1 RACE OF SP PACIFIC ISLNDR
                     **rl5yourrace8  (Sensitive)**     R5 RL1 RACE OF SP OTHER SPECIFY

**QUESTION TEXT:**

> SHOW CARD RL1
>
> What race {do you/does SP} consider {yourself/himself/herself} to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, or something else?
>
> SELECT ALL THAT APPLY

**CODES**        **Code All That Apply**
   1             WHITE/CAUCASIAN                 BOX RL2
   2             BLACK/AFRICAN AMERICAN          BOX RL 2
   3             AMERICAN INDIAN                 BOX RL2
   4             ALASKA NATIVE                   BOX RL2
   5             ASIAN                           BOXRL2
   6             NATIVE HAWAIIAN                 BOX RL2
   7             PACIFIC ISLANDER                BOX RL2
   8             OTHER (SPECIFY)
                 REFUSED                         BOX RL2
                 DON'T KNOW                      BOX RL2

**PROGRAMMER INSTRUCTIONS:**
   Allow select all that apply.

---

**RL1A**                        **RL1A**                                NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER RACE

**ENTER TEXT**

Length                                    75

---

**BOX RL2**              **BOXRL2**                    NOT ON FILE

If more than one response category selected at RL1, continue.

Otherwise, go to RL3.

---

**RL2**                    **rl5primarace (Sensitive)**      R5 RL2 RACE CONSID YRSLF PRIMRLY

**DISPLAY INSTRUCTIONS:**

Display "or" between each race in question text.

In question text, display only response categories selected at RL1.
Display only response codes from categories selected at RL1.

**QUESTION TEXT:**

{Do you consider yourself/Does SP consider {himself/herself}} primarily {RESPONSE CATEGORIES SELECTED AT RL1}?

**CODES**          **Code All That Apply**
1                  WHITE/CAUCASIAN
2                  BLACK/AFRICAN AMERICAN
3                  AMERICAN INDIAN
4                  ALASKA NATIVE
5                  ASIAN
6                  NATIVE HAWAIIAN
7                  PACIFIC ISLANDER
8                  OTHER RACE SPECIFIED AT RL1A
                   REFUSED
                   DON'T KNOW

---

**RL3**                    **rl5hisplatno (Sensitive)**      R5 RL3 CNSDR YRSF HSPAN OR LATNO

**QUESTION TEXT:**

{Do you/Does SP} consider {yourself/himself/herself} Hispanic or Latino?

**CODES**
1                  YES
2                  NO                            RL5
                   REFUSED                       RL5
                   DON'T KNOW                    RL5

---

**RL4**                    **rl1mexpurcu1 (Sensitive)**      R5 RL4 HISP ETHNCTY MEXICAN AMER
                           **rl1mexpurcu2 (Sensitive)**      R5 RL4 HISP ETHNCTY PUERO RICAN
                           **rl1mexpurcu3 (Sensitive)**      R5 RL4 HISP ETHNCTY CUBAN AMER
                           **rl1mexpurcu4 (Sensitive)**      R5 RL4 HISP ETHNCTY OTHR SPECIFY
                                                             R5 RL4 HISP ETHNCTY DOMINICAN

**rl1mexpurcu5 (Sensitive)**      R5 RL4 HISP ETHNCTY CENTRAL AMER
**rl1mexpurcu6 (Sensitive)**      R5 RL4 HISP ETHNCTY SOUTH AMER
**rl1mexpurcu7 (Sensitive)**      R5 RL4 HISP ETHNCTY SPANISH
**rl1mexpurcu8 (Sensitive)**

**QUESTION TEXT:**

SHOW CARD RL2
Would {you/SP} say {you are/{he/she} is} Mexican American, Puerto Rican, Cuban American, or something else?

SELECT ALL THAT APPLY

**CODES**      **Code All That Apply**

| | | |
|---|---|---|
| 1 | MEXICAN AMERICAN/CHICANO | RL5 |
| 2 | PUERTO RICAN | RL5 |
| 3 | CUBAN AMERICAN | RL5 |
| 4 | OTHER (SPECIFY) | |
| | REFUSED | RL5 |
| | DON'T KNOW | RL5 |

**PROGRAMMER INSTRUCTIONS:**

Allow select all that apply.

---

# RL4A      RL4A      NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER HISPANIC OR LATINO GROUP

**ENTER TEXT**

Length      75

---

# RL5      rl5condspanh      R5 RL5 INTRVIW CONDCTD IN SPANSH

**QUESTION TEXT:**

IS THIS INTERVIEW BEING CONDUCTED IN SPANISH?

**CODES**

| | | |
|---|---|---|
| 1 | YES | RL7 |
| 2 | NO | |

---

# RL6      rl5spkothlan      R5 RL6 SPEAK LANG OTH THN ENGLSH

**QUESTION TEXT:**

{Do you/Does SP} speak a language other than English?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION VA |
| | REFUSED | SECTION VA |

---

**RL7**                    **rl5unspokeng**                    R5 RL7 HOW UNDRSTND SPOKEN ENGL

**QUESTION TEXT:**

How well would you say {you understand/SP understands} English when someone is speaking to {you/him/her}?  Would you say very well, well, not well, or not at all?

**CODES**

| | |
|---|---|
| 1 | VERY WELL |
| 2 | WELL |
| 3 | NOT WELL |
| 4 | NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

---

**RL8**                    **rl5spkengwel**                    R5 RL8 HOW WELL SPEAK ENGLISH

**QUESTION TEXT:**

How well would you say {you speak/SP speaks} English?  Would you say very well, well, not well, or not at all?

**CODES**

| | |
|---|---|
| 1 | VERY WELL |
| 2 | WELL |
| 3 | NOT WELL |
| 4 | NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section VA – Veteran's Status.

---

| Derived Variables from Items in RL Section | |
|---|---|
| **rl5dracehisp** | R5 D RACE AND HISPANIC ETHNICITY |

---

**VA1**            **va5serarmfor**        R5 VA1 SERVED IN ARMED FORCES

**QUESTION TEXT:**

Did {you/SP} ever serve on active duty in the Armed Forces of the United States?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | VA3 |
| | REFUSED | VA3 |
| | DON'T KNOW | VA3 |

---

**VA2**           

| | |
|---|---|
| **va5whnserva1 (Sensitive)** | R5 VA2 WHEN SERVD BEFRE NOV 1941 |
| **va5whnserva2 (Sensitive)** | R5 VA2 WHN SERVD WWII |
| **va5whnserva3 (Sensitive)** | R5 VA2 WHN SERVD 1947 TO 1950 |
| **va5whnserva4 (Sensitive)** | R5 VA2 WHN SERVD KOREAN WAR |
| **va5whnserva5 (Sensitive)** | R5 VA2 WHN SERVD 1955 TO 1964 |
| **va5whnserva6 (Sensitive)** | R5 VA2 WHN SERVD VIETNAM ERA |
| **va5whnserva7 (Sensitive)** | R5 VA2 WHN SERVD 1975 TO 1990 |
| **va5whnserva8 (Sensitive)** | R5 VA2 WHN SERVD 1990 TO 2001 |
| **va5whnserva9 (Sensitive)** | R5VA2 WHN SERVD 2001 OR LATER |

**QUESTION TEXT:**

SHOW CARD VA1

When did {you/SP} serve on active duty in the U.S. Armed Forces?

SELECT ALL THAT APPLY

SELECT EACH PERIOD SP SERVED, EVEN IF IT WAS ONLY FOR PART OF THE PERIOD

**CODES**        **Code All That Apply**

| | |
|---|---|
| 1 | NOVEMBER 1941 OR EARLIER |
| 2 | WORLD WAR II (DECEMBER 1941-DECEMBER 1946) |
| 3 | JANUARY 1947 – JUNE 1950 |
| 4 | KOREAN WAR (JULY 1950 – JANUARY 1955) |
| 5 | FEBRUARY 1955 – JULY 1964 |
| 6 | VIETNAM ERA (AUGUST 1964 – APRIL 1975) |
| 7 | MAY 1975 – JULY 1990 |
| 8 | AUGUST 1990 – AUGUST 2001 (INCLUDING PERSIAN GULF WAR) |
| 9 | SEPTEMBER 2001 OR LATER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.

---

**VA3**            **va5memnatgrd**        R5VA3 MEMBER OF NATIONAL GUARD

**QUESTION TEXT:**

{Were you/Was SP} ever an active member of a National Guard or military reserve unit?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX VA4**         **BOX VA4**         NOT ON FILE

If VA1=1 (YES) or VA3=1 (YES), go to VA4.

Otherwise, go to Section WB – Well-being.

---

**VA4**         **va5disability**         R5 VA4 SERVICE RELATED DISABILITY

**QUESTION TEXT:**

{Do you/Does SP} have a disability related to service in the Armed Forces, the National Guard, or military reserve of the United States?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section WB – Well-being.

---

## BOX WB1PRE          **BOXWB1PRE**              NOT ON FILE

If PROXY flag=1 (YES), go to Section IP – Insurance Plans.

Otherwise, continue.

---

## WB1PRE          **WB1PRE**              NOT ON FILE

**QUESTION TEXT**

The next few questions focus on your feelings over the last month.

PRESS 1 AND ENTER TO CONTINUE

---

## WB1          **wb5offelche1**          R5 WB1 OFTEN YOU FEEL CHEERFUL
            **wb5offelche2**          R5 WB1 OFTEN YOU FEEL BORED
            **wb5offelche3**          R5 WB1 OFTEN YOU FEEL FULLOFLIFE
            **wb5offelche4**          R5 WB1 OFTEN YOU FEEL UPSET

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for WB1 [a-d]

If at WB1a, do not display question text in brackets.

Otherwise, display question text in brackets.

**QUESTION TEXT:**

SHOW CARD WB1

{[}During the last month, how often did you feel{]}

{variable text [a-d]}

RESPONSE [1] a. cheerful?
RESPONSE [2] b. bored?
RESPONSE [3] c. full of life?
RESPONSE [4] d. upset?

{[}Would you say every day, most days, some days, rarely, or never?{]}

**CODES**

| | |
|---|---|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

| **WB2** | **wb5truestme1** | R5 WB2 SP LIFE HAS MEANING PURPS |
| | **wb5truestme2** | R5 WB2 SP FEELS CONFIDENT |
| | **wb5truestme3** | R5 WB2 SP GAVE UP IMPROVING LIFE |
| | **wb5truestme4** | R5 WB2 SP LIKES LIVING SITUATION |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for WB2 [a-d]

If at WB2a, do not display question text in brackets.

Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}Next, tell me whether you agree a lot, a little, or not at all with the following statements about your life.{]}

{variable text [a-d]}

RESPONSE [1] a. My life has meaning and purpose.
RESPONSE [2] b. I feel confident and good about myself.
RESPONSE [3] c. I gave up trying to improve my life a long time ago.
RESPONSE [4] d. I like my living situation very much.

**CODES**

| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-d sequence until all rows have been displayed.

| **WB3** | **wb5ageyofeel** | R5 WB3 AGE YO FEEL MOST OF TIME |

**QUESTION TEXT:**

Sometimes people feel older or younger than their age. During the last month, what age did you feel most of the time?

ENTER AGE

**ENTER NUMBER**

| Range | 18 to 110 |
| REFUSED | |
| DON'T KNOW | |

| **WB4** | **wb5agrwstmt1** | R5 WB4 SP SELF DETERMINATION |
| | **wb5agrwstmt2** | R5 WB4 SP WANTS-FINDS WAY TO DO |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for WB4 [a-c

If at WB4a, do not display question text in brackets.

Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}For these last few statements, please tell me if you agree a lot, a little, or not at all.{]}

{variable text [a-c]}

RESPONSE [1] a. Other people determine most of what I can and cannot do.
RESPONSE [2] b. When I really want to do something, I usually find a way to do it.
RESPONSE [3] c. I have an easy time adjusting to change.

**CODES**

| | |
|---|---|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-c sequence until all rows have been displayed.

Go to Section IP – Insurance Plans.

| Section | IP | [INSURANCE PLANS] | Sequence: 35 |
|---|---|---|---|

## IP1PRE

| IP1PRE | | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**

> Now we have a few questions about {your/SP's} health insurance.
>
> PRESS 1 AND ENTER TO CONTINUE

## IP1

| ip5covmedcad | R5 IP1 COVERD BY MEDICARE PART D |
|---|---|

**QUESTION TEXT:**

> {Are you/Is SP} (currently) covered by or enrolled in a Medicare Prescription Drug plan, also called Part D?

**CODES**

| 1 | YES | IP3 |
|---|---|---|
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

## IP2

| ip5otdrugcov | R5 IP2 DRUG COVERG SOME OTHER WAY |
|---|---|

**QUESTION TEXT:**

> {Do you/Does SP} have prescription drug coverage through a current or former employer or some other way?

**CODES**

| 1 | YES |
|---|---|
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## IP3

| ip5mgapmedsp | R5 IP3 MEDIGAP OR MEDICARE SUPP |
|---|---|

**QUESTION TEXT:**

> Some people have additional coverage besides Medicare to pay for doctors and other medical care. This is sometimes referred to as Medigap or a Medicare Supplement. {Do you/Does SP} have this type of health insurance coverage?

**CODES**

| 1 | YES |
|---|---|
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## IP4

| ip5cmedicaid | R5 IP4 COV BY STATE MEDICAID PRG |
|---|---|

**DISPLAY INSTRUCTIONS:**

> Display ", also known as {STATE NAME FOR MEDICAID PROGRAM}," and "{STATE NAME FOR MEDICAID PROGRAM}" if state name for Medicaid is not "Medicaid".

Otherwise display "Medicaid"

**QUESTION TEXT:**

Medicaid {, also known as {STATE NAME FOR MEDICAID PROGRAM},} is a state program for low-income people or for people on public assistance. Sometimes people with very large medical bills are also covered by Medicaid.

{Are you/Is SP} now covered by {Medicaid/{STATE NAME FOR MEDICAID PROGRAM}}?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.

---

**IP5**                    **ip5covtricar**                    R5 IP5 COVERED BY TRICARE

**QUESTION TEXT:**

TRICARE is a health care program for active duty and retired members of the uniformed Armed Forces, their families, and survivors.

{Are you/Is SP} now covered by TRICARE?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IP5A**                    **BOX IP5A**                    NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to IP6.

Else if LAST INT IP6 = 1 (YES), go to IP5A.

Otherwise, go to IP6

---

**IP5A**                    **ip5nginslast**                    R5 IP5A HAVE LTC INS FROM LAST INT

**QUESTION TEXT:**

At the time of the last interview ({LAST INT MONTH, DAY, AND YEAR}), {you/SP} had insurance that paid for a year or more of care in a nursing home, assisted living, or in {your/his/her} home. {Do you/Does {he/she}} still have this insurance?

**CODES**

| | | |
|---|---|---|
| 1 | YES | IP7 |
| 2 | NO | SECTION LF |
| 90 | LAST INTERVIEW INFORMATION INCORRECT | |
| | REFUSED | SECTION LF |
| | DON'T KNOW | SECTION LF |

---

**IP6**                    **ip5nginsnurs**              R5 IP6 NONGOV INSR FOR NURS HOME

**QUESTION TEXT:**

Not including government programs, {do you/does SP} have any insurance that would pay for a year or more of care in a nursing home, assisted living, or in {your/his/her} home?

**CODES**
| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION LF |
| | REFUSED | SECTION LF |
| | DON'T KNOW | SECTION LF |

---

**IP7a**                    **ip5typcarco1**              R5 IP7 LTC INS NURSNG HOME COVD

                        **ip5typcarco2**              R5 IP7 LTC INS ASSISTD LVNG COVD

                        **ip5typcarco3**              R5 IP7 LTC INS HOME HEALTH COVD

**QUESTION TEXT:**

Which types of care are covered by {your/SP's} policy? Care in: a nursing home, assisted living, or care in {your/his/her} home?

SELECT ALL THAT APPLY

**CODES**          **Code All That Apply**
| | |
|---|---|
| 1 | NURSING HOME CARE |
| 2 | ASSISTED LIVING |
| 3 | CARE BY HOME HEALTH PROVIDERS IN HOME |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
Allow code all that apply.

---

**IP8**                    **ip5paypremms**              R5 IP8 HOW MUCH PAY IN PREMIUMS

**QUESTION TEXT:**

SHOW CARD IP1

For the year ending December {CURRENT YEAR-1}, how much altogether did {you/SP} pay in premiums? Would you say

**CODES**
| | |
|---|---|
| 1 | less than $1,000, |
| 2 | $1,000 to less than $2,000, |
| 3 | $2,000 to less than $3,000, |
| 4 | $3,000 to less than $5,000, or |
| 5 | $5,000 or more? |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IP9**                **BOXIP9**                    NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to IP9.

Otherwise, go to Section LF – Labor Force.

| **IP9** | ip5longhadpl | R5 IP9 HOW LONG HAD THIS POLICY |
|---|---|---|

**QUESTION TEXT:**

How long {have you/has SP} had this policy?

INDICATE RESPONSE UNIT

**CODES**

| 1 | NUMBERS OF YEARS | IP9A |
|---|---|---|
| 2 | AGE | IP9B |
| | REFUSED | SECTION LF |
| | DON'T KNOW | SECTION LF |

| **IP9A** | ip5numyears | R5 IP9A NUMBER OF YEARS |
|---|---|---|

**QUESTION TEXT:**

ENTER NUMBER OF YEARS SP HAS HAD POLICY

ENTER ZERO IF LESS THAN 1 YEAR

**ENTER NUMBER**

Range                                                                    0 to 40

**PROGRAMMER INSTRUCTIONS:**
Range 0-40

Go to Section LF – Labor Force

| **IP9B** | ip5agepurpol | R5 IP9B AGE WHEN PURCHSD POLICY |
|---|---|---|

**QUESTION TEXT:**

ENTER AGE OF SP WHEN PURCHASED POLICY

**ENTER NUMBER**

Range                                                                    30 to 110
Soft Range                                                               40 to 90

**PROGRAMMER INSTRUCTIONS:**
Hard range 30-110
Soft range 40-90

Go to Section LF – Labor Force

---

## LF1PRE        LP1PRE          NOT ON FILE

**QUESTION TEXT:**

> We have some questions about {you/SP} and {your/his/her} family to help us understand how well people are managing financially these days.
>
> PRESS 1 AND ENTER TO CONTINUE

---

## BOX LF1        BOX LF1          NOT ON FILE

> If NEWSAMPLE flag = 1 (YES) and FACILITY flag = 1 (YES) and PA17 <> 1 (WORKED IN LAST MONTH), go to LF11.
>
> Else, if FACILITY flag=1 (YES) and PA17 <> 1 (WORKED IN LAST MONTH), go to BOX LF13.
>
> Otherwise, go to LF1.

---

## LF1        lf5workfpay          R5 LF2 WORKED FOR PAY REENTLY

**DISPLAY INSTRUCTIONS:**

> If TODAY'S date is a Saturday, display "beginning on Sunday {MONTH, DAY OF SUNDAY PRIOR TO INTERVIEW}" and "today"
> If TODAY'S date is not a Saturday, display "on Sunday {MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE}" and "on Saturday {MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE}

**QUESTION TEXT:**

> Did {you/SP} do any work for pay in the last week?  By the last week, I mean the week beginning on Sunday {MONTH, DAY OF SUNDAY PRIOR TO TODAY/MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE} and ending {today/on Saturday {MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | LF4 |
| 2 | NO | |
| 3 | RETIRED/DON'T WORK ANYMORE | BOX LF11 |
| | REFUSED | |
| | DON'T KNOW | |

---

## LF2        lf5abstlstwk          R5 LF2 ABSENT FRM JOB LAST WEEK

**QUESTION TEXT:**

> {Do you/Does SP} have a job from which {you were/{he/she} was} absent last week because of illness, vacation, or some other reason?

**CODES**

| | | |
|---|---|---|
| 1 | YES | LF4 |
| 2 | NO | |
| 3 | RETIRED/DON'T WORK ANYMORE | BOX LF11 |
| | REFUSED | BOX LF11 |
| | DON'T KNOW | BOX LF11 |

## LF3      lf5wrkplstmn      R5 LF3 WORK FOR PAY IN LST MONTH

**QUESTION TEXT:**

{Now think about last month, that is {MONTH BEFORE INTERVIEW MONTH}. Did {you/SP} do any work for pay at any time in the last month?

**CODES**

| | | |
|---|---|---|
| 1 | YES | LF8 |
| 2 | NO | BOX LF11 |
| | REFUSED | BOX LF11 |
| | DON'T KNOW | BOX LF11 |

## LF4      lf5mrthnonjb      R5 LF4 MOR THN ONE JOB LAST WEEK

**QUESTION TEXT:**

Last week, did {you/SP} have more than one job, including part-time, evening, or weekend work?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

## LF5      lf5hrswkwork      R5 LF5 HRS PR WEEK WORK MAIN JOB

**DISPLAY INSTRUCTIONS:**

If LF4=1 (YES), display "main job" and "By main job, I mean the job at which {you work/{he/she} works} the most hours."

Otherwise, display "job".

**QUESTION TEXT:**

How many hours per week {do you/does SP} usually work at {your/his/her} {job/main job}? {By main job, I mean the job at which {you work/{he/she} works} the most hours.}

ENTER NUMBER OF HOURS USUALLY WORK

IF NUMBER OF HOURS VARY EACH WEEK, ENTER 97

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 100 |
| REFUSED | LF8 |
| DON'T KNOW | LF8 |

**PROGRAMMER INSTRUCTIONS:**
Range: 1-100, and 997.

## BOX LF6      BOX LF6      NOT ON FILE

If LF2=1 (YES, ABSENT LAST WEEK), go to LF7.
Otherwise go to LF6.

## LF6      lf5hrwrkltwk      R5 LF6 HOURS WORK LAST WEEK

**QUESTION TEXT:**

How many hours did {you/SP} work last week?

ENTER NUMBER OF HOURS

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 100 |
| REFUSED | LF8 |
| DON'T KNOW | LF8 |

**PROGRAMMER INSTRUCTIONS:**

ALL RESPONSES SKIP TO LF8

---

**LF7**        **lf5hrwrklstw**        R5 LF7 HOW MNY HOURS DID YOU WRK

**QUESTION TEXT:**

You said {you were/SP was} absent from work last week.  How many hours did {you/he/she} work the last week {you were/{he/she} was} at work?

ENTER NUMBER OF HOURS

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 100 |
| REFUSED | |
| DON'T KNOW | |

---

**LF8**        **lf5oftpaid**        R5 LF8 HOW OFTN PAID ON MAIN JOB

**DISPLAY INSTRUCTIONS:**

If LF4=1 (YES), display "In {your/SP's} main job, {are you/is {he/she}}"

Otherwise, display "Are you/Is SP".

**QUESTION TEXT:**

{{Are you/Is SP} /In {your/SP's} main job, {are you/is {he/she} }}paid every week, every two weeks, two times a month, or on some other schedule?

**CODES**

| | | |
|---|---|---|
| 1 | EVERY WEEK | LF9 |
| 2 | EVERY TWO WEEKS | LF9 |
| 3 | TWO TIMES A MONTH | LF9 |
| 4 | ONCE A MONTH | LF9 |
| 5 | DAILY | LF9 |
| 91 | OTHER SCHEDULE (SPECIFY) | |
| | REFUSED | LF9 |
| | DON'T KNOW | LF9 |

---

**LF8A**        **LF8A**        NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHE PAYMENT SCHEDULE

ENTER TEXT

        Length                             25

---

## LF9                lf5lstpaychk          R5 LF9 HOW MUCH LAST PAYCHECK

**DISPLAY INSTRUCTIONS:**

    If LF4=1 (YES), display "for {your/his/her} main job"

**QUESTION TEXT:**

How much was {your/SP's} last paycheck before taxes and any other deductions {for {your/his/her} main job}?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: If it is easier, you can just tell me how much {you earn/SP earns} per hour or per day.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER PAYCHECK AMOUNT | |
| 2 | ENTER PAY PER HOUR | LF9B |
| 3 | ENTER PAY PER DAY | LF9C |
| | REFUSED | BOX LF11 |
| | DON'T KNOW | BOX LF11 |

---

## LF9A             lf5pychkamnt         R5 LF9A PAYCHECK AMOUNT

**QUESTION TEXT:**

ENTER PAYCHECK AMOUNT

$ _____

**ENTER NUMBER**

        Range                             1 to 999999

**PROGRAMMER INSTRUCTIONS:**

Use input mask in response field ($999,999) so that dollar sign is displayed and commas are inserted appropriately.

Go to LF10.

---

## LF9B             lf5perhrpay          R5 LF9B PAY PER HOUR

**QUESTION TEXT:**

ENTER PAY PER HOUR

$ _____

**ENTER NUMBER**

        Range                             1 to 999.99

**PROGRAMMER INSTRUCTIONS:**

Use input mask in response field ($999.99) so that dollar sign is displayed and decimal point is inserted appropriately.

Go to LF10.

---

**LF9C**                    **lf5perdaypay**              R5 LF9C PAY PER DAY

**QUESTION TEXT:**

ENTER PAY PER DAY

$ _____

**ENTER NUMBER**

Range                                                    1 to 9999

**PROGRAMMER INSTRUCTIONS:**

Use input mask in response field ($9,999) so that dollar sign is displayed and comma is inserted appropriately.

---

**LF10**                    **lf5ernfrmwrk**              R5 LF10 AMT EARN FRM WRK LST MTH

**QUESTION TEXT:**

Now thinking about the month of {CURRENT MONTH -1 MONTH}, how much did {you/SP} earn altogether from any work {you/he/she} did in {CURRENT MONTH -1 MONTH}, before taxes and before any other deductions?

IF NEEDED:  We don't need an exact dollar amount.  An approximate amount is fine.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

$ _____

**ENTER NUMBER**

Range                                                    1 to 999999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use input mask in response field ($999,999) so that dollar sign is displayed and commas are inserted appropriately.

---

**BOX LF11**                **BOXLF11**                   NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to LF11.
Otherwise, go to BOX LF12.

---

**LF11**                    **lf5occupaton**              R5 LF11 OCCUPATION MOST OF LIFE

**QUESTION TEXT:**

We are interested in the work people did most of their lives. What kind of work was that? (In other words, what was {your/SP's} occupation?)

**CODES**

| | | |
|---|---|---|
| 1 | ENTER OCCUPATION | |
| 2 | NEVER WORKED ENTIRE LIFE | BOX LF12 |
| 3 | HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME | BOX LF12 |
| | REFUSED | BOX LF12 |
| | DON'T KNOW | BOX LF12 |

---

**LF11A**　　　　**lf5doccptctgy**　　　　R5 D LONGEST OCCUPATION CATEGORY

**QUESTION TEXT:**

ENTER OCCUPATION DESCRIPTION

**ENTER TEXT**

Length　　　　　　　　　　　　　　150

---

**BOX LF12**　　　　**BOXLF12**　　　　NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and (LF1 or LF2 or LF3 = 1 (YES)) and (LF11 = 3 (HOMEMAKER), RF, or DK), go to LF12A.
Else if NEWSAMPLE flag = 1 (YES) and (LF1 or LF2 or LF3 = 1 (YES)), go to LF12.
Else if LF1 or LF2 or LF3 = 1 (YES), go to LF12A.
Otherwise, go to BOX LF13.

---

**LF12**　　　　**lf5diffwrknw**　　　　R5 LF12 DO THS WRK SOMETHNG DIFF

**QUESTION TEXT:**

{Are you/Is SP} doing this kind of work now or {are you/is {he/she}} doing something different?

**CODES**

| | | |
|---|---|---|
| 1 | SAME KIND OF WORK | BOX LF13 |
| 2 | SOMETHING DIFFERENT | |
| | REFUSED | BOX LF13 |
| | DON'T KNOW | BOX LF13 |

---

**LF12A**　　　　**lf5doccup**　　　　R5 D CURRENT OCCUPATION CATEGORY

**QUESTION TEXT:**

We are interested in the kind of work {you do/SP does} now. What kind of work is that? (In other words, what is {your/his/her} current occupation?

ENTER OCCUPATION DESCRIPTION

**ENTER TEXT**

Length　　　　　　　　　　　　　　150
REFUSED

DON'T KNOW

---

**BOX LF13**           **BOX LF13**           NOT ON FILE

If [CURRENT INT SP MARITAL STATUS from PERSON ROSTER= 1 (MARRIED) or 2 (LIVING WITH A PARTNER)], go to LF13.

Otherwise, go to Section HP – Home Ownership.

---

**LF13**           **lf5huswifwrk**           R5 LF13 HUSB WIFE PARTN PAY WORK

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".

Otherwise display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

Did {you/SPOUSE/PARTNER FIRSTNAME LASTNAME} do any work for pay in the month of {CURRENT MONTH-1 MONTH}?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | Section HP |
| | REFUSED | Section HP |
| | DON'T KNOW | Section HP |

---

**LF14**           **lf5huwpaearn**           R5 LF14 HUS WIFE PAR PAY LAT MTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Else if PROXY flag =1 (YES), display "SP's".
Otherwise display "your".

If PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH1=2 (LIVING WITH A PARTNER), display "partner".

Else if PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH5=1 (MALE), display "husband".

Else if PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH5=2 (FEMALE), display "wife".

**QUESTION TEXT:**

In {CURRENT MONTH -1 MONTH}, how much altogether did {you/your/SP's} {husband/wife/partner} earn before taxes and before any other deductions?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

$_____

**ENTER NUMBER**

---

Range                                   1 to 999999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use input mask in response field ($999,999) so that dollar sign is displayed and commas are inserted appropriately.
Go to Section HP – Home Ownership

| Derived Variables from Items in the LF Section | |
|---|---|
| **lf5doccpctgy** | R5 D LONGEST OCCUPATION CATEGORY |
| **lf5doccup** | R5 D CURRENT OCCUPATION CATEGORY |

## HP1           hp5ownrentot           R5 HP1 OWN RENT OR OTHER

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".
Else display "home".

If FACILITY flag=1 (YES) and FACILITY NAME is available, display "{FACILITY NAME/text from HT9b}".
Else if FACILITY flag=1 (YES) and FACILITY NAME is null, display "SP's {ADDRESS1 , ADDRESS 2} from PERSON ROSTER".

If FACILITY flag=1 (YES), display "{apartment/unit/suite/room/other} at {FACILITY NAME/SP's{ADDRESS1 , ADDRESS 2} from PERSON ROSTER }" and "{or pay a monthly amount to live there}" .
Otherwise, display "{own the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}}".

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} {own the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}}/ {apartment/unit/suite/room/other} at {FACILITY NAME/SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}, rent it {or pay a monthly amount to live there}, or is there some other arrangement?

**CODES**

| | | |
|---|---|---|
| 1 | OWN | |
| 2 | RENT (OR PAY MONTHLY AMOUNT) | HP6 |
| 3 | SOME OTHER ARRANGEMENT | HP5 |
| | REFUSED | HP5 |
| | DON'T KNOW | HP5 |

## HP2           hp5mrtpadoff           R5 HP2 MORTGAGE PAID OFF

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".

Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

Is {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} mortgage

paid off or are monthly mortgage payments still being made?

IF NEEDED:  Include any payments on a home equity loan or second mortgage.

**CODES**

| | | |
|---|---|---|
| 1 | PAID OFF | HP4 |
| 2 | STILL MAKE PAYMENTS | |
| 3 | REVERSE MORTGAGE | HP4 |
| | REFUSED | HP4 |
| | DON'T KNOW | HP4 |

---

## HP3           hp5mthlymort       R5 HP3 MORTGAGE PAYMNT EACH MNTH

**QUESTION TEXT:**

How much (altogether) is that each month?

ENTER DOLLAR AMOUNT [HP3B]

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 9999 |
| Soft Range | 100 to 5000 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 1-9999
Soft Range: 100-5000

Use input mask in response field ($9,999) so that dollar sign is displayed and commas are inserted appropriately.

---

## HP3A           hp5mortpaymt       R5 HP3A MORTGAGE PAYMENT AMOUNT

**QUESTION TEXT:**

SHOW CARD HP1

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $250, |
| 2 | $250 TO LESS THAN $500, |
| 3 | $500 TO LESS THAN  $1,000 |
| 4 | $1,000 TO LESS THAN $3,000 |
| 5 | $3,000 TO LESS THAN $5,000 |
| 6 | $5,000 OR MORE? |
| | REFUSED |
| | DON'T KNOW |

---

## HP3B           hp5whnpayoff       R5 HP3B WHEN EXPCT PAY OFF MORTG

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display

"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} expect to pay off the mortgage(s) within 5 years, 10 years, or longer?

**CODES**

| | |
|---|---|
| 1 | 5 YEARS |
| 2 | 10 YEARS |
| 3 | LONGER THAN 10 YEARS |
| | REFUSED |
| | DON'T KNOW |

---

# HP3C          **hp5amtstlowe**          R5 HP3C HOW MUCH STILL OWE

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

About how much {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} still owe on the mortgage(s)?

IF NEEDED:  The nearest $10,000 is fine.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT          [HP4]

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 999999 |
| Soft Range | 500 to 900000 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 1-9999999
Soft Range: 500-900000

Use input mask in response field ($9,999,999) so that dollar sign is displayed and commas are inserted appropriately.

---

# HP3D          **hp5amoutowed**          R5 HP3D THE AMOUNT OWED IS

**QUESTION TEXT:**

Is the amount owed…

**CODES**

| | |
|---|---|
| 1 | less than $50,000, |
| 2 | $50,000 to less than $100,000, or |
| 3 | $100,000 or more? |
| | REFUSED |
| | DON'T KNOW |

---

# HP4　　　　　　　hp**5**homevalue　　　　R5 HP4 PRESENT VALUE OF HOME

**QUESTION TEXT:**

> What is the present value of this home?  I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?
>
> IF NEEDED: Your best guess or the nearest $10,000 is fine.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER DOLLAR AMOUNT　　　　　　[SECTION IA]

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 999999 |
| Soft Range | 500 to 900000 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 1-9999999
Soft Range: 500-900000

Use input mask in response field ($9,999,999) so that dollar sign is displayed and commas are inserted appropriately.

---

# HP4A　　　　　　hp**5**homvalamt　　　　R5 HP4A HOME VALUE AMOUNT

**QUESTION TEXT:**

> SHOW CARD HP2
>
> Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| LESS THAN $50,000 | SECTION IA | |
| 2 | $50,000 TO LESS THAN $75,000 | SECTION IA |
| 3 | $75,000 TO LESS THAN $100,000 | SECTION IA |
| 4 | $100,000 TO LESS THAN $200,000 | SECTION IA |
| 5 | $200,000 TO LESS THAN $300,000 | SECTION IA |
| 6 | $300,000 TO LESS THAN $500,000 | SECTION IA |
| 7 | $500,000 TO LESS THAN $750,000 | SECTION IA |
| 8 | $750,000 OR MORE | SECTION IA |
| | REFUSED | SECTION IA |
| | DON'T KNOW | SECTION IA |

---

## HP5      **hp5payrent**      R5 HP5 DO YOU PAY RENT

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STAUS from PERSON ROSTER = 1 (MARRIED) OR 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} pay to live here?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION IA |
| | REFUSED | SECTION IA |
| | DON'T KNOW | SECTION IA |

---

## HP6      **hp5rentamt**      R5 HP6 RENT PAID EACH MONTH

**QUESTION TEXT:**

How much is that each month?

ENTER DOLLAR AMOUNT      [BOX HP7]

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 9999 |
| Soft Range | 1 to 3000 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 0-9999
Soft Range: 1-3000

Use input mask in response field ($9,999) so that dollar sign is displayed and commas are inserted appropriately.

---

## HP6A      **hp5rentamout**      R5 HP6A RENT AMOUNT

**QUESTION TEXT:**

SHOW CARD HP1

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $250 |
| 2 | $250 TO LESS THAN $500 |
| 3 | $500 TO LESS THAN $1,000 |
| 4 | $1,000 TO LESS THAN $3,000 |
| 5 | $3,000 TO LESS THAN $5,000 |
| 6 | $5,000 OR MORE |

REFUSED
DON'T KNOW

---

**BOX HP7**             **BOX HP7**                    NOT ON FILE

If HP6>=$750 or HP6a= 4 ($1,000 TO LESS THAN $3,000), 5 ($3,000 TO LESS THAN $5,000), or 6 ($5,000 OR MORE), go to SECTION IA – Income and Assets.
Otherwise, go to HP7.

---

**HP7**                 **hp5sec8pubsn**               R5 HP7 HME SEC 8 PUBL/SENOR HOUS

**QUESTION TEXT:**

Is this home in Section 8 public housing or housing for low-income seniors?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Go to Section IA– Income and Assets.

---

## IA1PRE                    IA1PRE                    NOT ON FILE

> We are interested in how people are getting along financially these days. The next few questions are about income and other resources. Your responses can help us understand how people manage financially as they age.
>
> Please feel free to refer to any records or other persons that may be of assistance in answering these questions.
>
> Many of these questions ask about "last month." By last month, I mean in {CURRENT MONTH – 1}.
>
> PRESS 1 AND ENTER TO CONTINUE

## IA1

| | ia5recsspa1 | R5 IA1 SP REC SOCIAL SECURITY |
|---|---|---|
| | ia5recsspa2 | R5 IA1 SPOUSE PART REC SOC SEC |
| | ia5recsspa3 | R5 IA1 NO SOC SECURTY PAYMNT REC |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <>1 (yes) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you". Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

Display "in the last month" in underlined text.

**QUESTION TEXT:**

> Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Social Security retirement and/or Railroad Retirement payments in the last month (that is in {CURRENT MONTH – 1})?
>
> {SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|---|---|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message

"INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

---

**BOX IA2**                    **BOXIA2**                    NOT ON FILE

If IA1 <> 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

---

**IA2**                    **ia5howrecssp**                    R5 IA2 HOW REC SOC SEC PAY

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1(YES), display "Do you".
Otherwise, display "Does SP".

**QUESTION TEXT:**

{Do you/Does SP} get payments by direct deposit, on a prepaid card, or by mail?

**CODES**
1         MAIL
2         DIRECT DEPOSIT
3         PREPAID CARD
          REFUSED
          DON'T KNOW

---

**IA3A**                    **ia5msrtrecss**                    R5 IA3A MTH STRD REC SOC SEC PAY

**DISPLAY INSTRUCTIONS:**

Display "MONTH" in underlined text".

**QUESTION TEXT:**

What month and year did {you/SP} start receiving Social Security?

ENTER MONTH

**ENTER NUMBER**
          Range                                        1 to 12
          REFUSED
          DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Do not display the phrase 'Enter Number'.

---

**IA3B**                    **ia5yrstressp**                    R5 IA3B YR STRTD REC SOC SEC PAY

**DISPLAY INSTRUCTIONS:**

Display "YEAR" in underlined text".

**QUESTION TEXT:**

[What month and year did {you/SP} start receiving Social Security?]

**ENTER NUMBER**

REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: {CURRENT YEAR – 45} – {CURRENT YEAR}.
Do not display the phrase 'Enter Number'.

---

| **IA4** | **ia5recssils1** | R5 IA4 SP RECEIVD SSI LAST MONTH |
| | **ia5recssils2** | R5 IA4 SPOUSE PRT REC SSI LST MO |
| | **ia5recssils3** | R5 IA4 NO SSI RECEIVD LAST MONTH |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and
response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

Display "last month" in underlined text.

**QUESTION TEXT:**

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive
Supplemental Security Income, which is also called SSI, last month?

IF NEEDED:  These are monthly government payments to lower-income people in need.

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|---|---|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message
"INCONSISTENT ANSWER.  'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the
screen.

---

| **IA5** | **ia5rvapayls1** | R5 IA5 SP REC PAY FRM VA LAST MO |
| | **ia5rvapayls2** | R5 IA5 SPOUS PA REC VA PAY LSTMO |
| | **ia5rvapayls3** | R5 IA5 NO VA PAY REC LAST MONTH |

## DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and
response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

Display "last month" in underlined text.

## QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive
any payments from the Veteran's Administration (U.S. Department of Veterans Affairs) last month
related to military service or veteran survivor's benefits?

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|-------|---------------------|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE |
|   | REFUSED |
|   | DON'T KNOW |

## PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when
leaving the screen.

---

**IA6PRE**  **IA6PRE**  NOT ON FILE

People sometimes have other retirement income.  This may be from pensions or retirement plans related
to their jobs.

PRESS 1 AND ENTER TO CONTINUE

---

**IA6**  **ia5penjobou1**  R5 IA6 SP HAS PENSION PLAN

**ia5penjobou2**  R5 IA6 SPOUSE HAS PENSION PLAN

**ia5penjobou3**  R5 IA6 NO PENSION PLAN

## DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and
response option 2, "YES, SPOUSE/PARTNER HAS PENSION".

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have
any pension plans that were a job-related or union benefit?

IF NEEDED:  These plans often require that a person work for a certain number of years before they
qualify or "are vested" in the pension plan.

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|-------|---------------------|
| 1 | YES, SP HAS PENSION |
| 2 | YES, SPOUSE/PARTNER HAS PENSION |
| 3 | NO PENSION |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 3 (NO PENSION) selected and [1 (SP PENSION) or 2 (SPOUSE PENSION)] is selected, display error message
"INCONSISTENT ANSWER.  'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the
screen.

---

| **IA7** | **ia5iraothac1** | R5 IA7 SP HAS IRA OTH RETIRE ACC |
|---------|------------------|----------------------------------|
|         | **ia5iraothac2** | R5 IA7 SPOUSE HAS IRA OTHR ACC |
|         | **ia5iraothac3** | R5 IA7 NO IRA OTHR RETIRE ACCT |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY"
and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS".

**QUESTION TEXT:**

SHOW CARD IA1

Please look at the types of retirement plans on this card.  {Do you/Does SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}}  have any of these?

IF NEEDED:  401Ks and 403Bs are plans where you contribute an amount each month from your
paycheck, and your employer may match some of your contribution.

IF NEEDED:  IRAs (Individual Retirement Accounts) are a type of plan you set up on your own.

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|---|---|
| 1 | YES, SP HAS 401K, 403B, IRA, OR RETIREMENT PLANS |
| 2 | YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS |
| 3 | NO PLANS |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.

If 3 (NO ACCT) selected and [1 (SP ACCT) or 2 (SPOUSE ACCT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

---

| IA8 | ia5mutfdstk1 | R5 IA8 SP OWNS MUTUAL FUND STOCK |
|---|---|---|
| | ia5mutfdstk2 | R5 IA8 SPOUSE OWNS FUNDS STOCK |
| | ia5mutfdstk3 | R5 IA8 SP SPOUSE OWN FUNDS STOCK |
| | ia5mutfdstk4 | R5 IA8 NO FUNDS OR STOCK OWNED |

**DISPLAY INSTRUCTIONS:**

If IA7 = 1 (SP RETIREMENT PLAN) or 2 (SPOUSE RETIREMENT ACCT), display "Not including the retirement accounts we have already talked about, {do you/does SP}".
Otherwise, display "Do you/Does SP".

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
Otherwise, display "Does SP" or "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

**QUESTION TEXT:**

{Not including the retirement accounts we have already talked about, {do you/does SP}/{Do you/ Does SP}} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any mutual funds or stocks?

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|---|---|
| 1 | YES, SP HAS ASSET |
| 2 | YES, SPOUSE/PARTNER HAS ASSET |
| 3 | YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY |
| 4 | NO ASSET OF THIS TYPE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.

If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

| IA9 | ia5ownbond1 | R5 IA9 SP OWNS BONDS |
|-----|-------------|----------------------|
|     | ia5ownbond2 | R5 IA9 SPOUSE OWNS BONDS |
|     | ia5ownbond3 | R5 IA9 SP SPOUSE OWN BONDS |
|     | ia5ownbond4 | R5 IA9 NO BONDS OWNED |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY"
and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE
ASSET JOINTLY".

**QUESTION TEXT:**

Not including what we've already talked about, {do you/does SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any bonds, such as Government
Savings Bonds, corporate, municipal, or other types of bonds?

{SELECT ALL THAT APPLY}

| CODES | Code All That Apply |
|-------|---------------------|
| 1 | YES, SP HAS ASSET |
| 2 | YES, SPOUSE/PARTNER HAS ASSET |
| 3 | YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY |
| 4 | NO ASSET OF THIS TYPE |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

| IA10PRE | IA10PRE | NOT ON FILE |
|---------|---------|-------------|

The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own.

PRESS 1 AND ENTER TO CONTINUE

| IA10 | ia5bnkacccd1 | R5 IA10 SP OWNS CHECK ACCT |
|------|--------------|----------------------------|
|      | ia5bnkacccd2 | R5 IA10 SPOUSE OWNS CHECK ACCT |

| | | |
|---|---|---|
| ia5bnkacccd3 | R5 IA10 SP SPOUSE OWN CHECK ACCT | |
| ia5bnkacccd4 | R5 IA10 NO CHECK ACCT OWNED | |
| ia5bnkacccd5 | R5 IA10 SP OWNS SAVINGS ACCT | |
| ia5bnkacccd6 | R5 IA10 SPOUSE OWNS SAVING ACCT | |
| ia5bnkacccd7 | R5 IA10 SP SPOUSE OWN SAVNG ACT | |
| ia5bnkacccd8 | R5 IA10 NO SAVINGS ACCT OWNED | |
| ia5bnkacccd9 | R5 IA10 SP OWNS CDS | |
| ia5bnkaccc10 | R5 IA10 SPOUSE OWNS CDS | |
| ia5bnkaccc11 | R5 IA10 SP SPOUSE OWN CDS | |
| ia5bnkaccc12 | R5 IA10 NO CDS OWNED | |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you". Otherwise, display "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

**QUESTION TEXT:**

Not counting what we've already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have …
RESPONSE [1] A. a checking account?
RESPONSE [2] B. a savings account or money market account?
RESPONSE [3] C. certificates of deposit?

{SELECT ALL THAT APPLY}

**CODES** **Code All That Apply**
1    YES, SP HAS ASSET
2    YES, SPOUSE/PARTNER HAS ASSET
3    YES, SP AND SPOUSE/PARTNER HAVE ASSET
     JOINTLY
4    NO ASSETS OF THIS TYPE
     REFUSED
     DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

| | | |
|---|---|---|
| **IA13** | ia5realestt1 | R5 IA13 SP OWNS REAL ESTATE |
| | ia5realestt2 | R5 IA13 SPOUSE OWNS REAL ESTATE |
| | ia5realestt3 | R5 IA13 SP SPOUSE OWN REAL ESTTE |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and
response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET
JOINTLY".

If HP1 = 1 (OWNS HOME), display "besides {your/SP}'s home".

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own
a business, a farm, or any other real estate {besides {your/SP's} home}, including land or rental
properties?

{SELECT ALL THAT APPLY}

**CODES**     **Code All That Apply**
1      YES, SP HAS ASSET
2      YES, SPOUSE/PARTNER HAS ASSET
3      YES, SP AND SPOUSE/PARTNER HAVE ASSET
       JOINTLY
4      NO ASSETS OF THIS TYPE
       REFUSED
       DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving
the screen.

**IA14PRE**          IA14PRE          NOT ON FILE

We now have a few questions which are important for understanding how people manage
financially as they age.

PRESS 1 AND ENTER TO CONTINUE

**BOX IA14**          BOXIA14          NOT ON FILE

If IA1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IA14.
Else if IA1 = 1 (SP RECEIVED SS/RR), go to IA15A.
Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IA16A.
Otherwise, go to BOX IA17.

**IA14**          ia5ssrrpymnt          R5 IA14 RECENT MTHLY SS RR PYMNT

**DISPLAY INSTRUCTIONS:**

> If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
> Otherwise, display "SP's".
>
> If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

> First, what was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH – 1})?
>
> IF NEEDED:  We don't need an exact dollar amount.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA15A |
| | REFUSED | IA14B |
| | DON'T KNOW | IA14B |

---

| **IA14A** | **ia5ssrrjtamt** | R5 IA14A JOINT SS RR AMOUNT |
|---|---|---|

**QUESTION TEXT:**

> ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

**ENTER NUMBER**

Range                                                     1 to 9999

**PROGRAMMER INSTRUCTIONS:**

> Range: $1-$9,999
> Do not display the phrase 'Enter Number'.
> If IA14A = 1-9999, go to BOX IA17

---

| **IA14B** | **ia5ssrrjtest** | R5 IA14B ESTMT JOINT SSRR AMOUNT |
|---|---|---|

**QUESTION TEXT:**

> SHOW CARD IA2
>
> Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $1,300, | BOX IA17 |
| 2 | $1,300 TO LESS THAN $1,700 | BOX IA17 |
| 3 | $1,700 TO LESS THAN $2,200 | BOX IA17 |
| 4 | $2,200 TO LESS THAN$2,600 | BOX IA17 |
| 5 | $2,600 OR MORE? | BOX IA17 |

|  | REFUSED | BOX IA17 |
|  | DON'T KNOW | BOX IA17 |

---

**IA15A**  ia5ssrrspamt  R5 IA15A SP SS RR AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <>1 (YES), display "your".
Otherwise, display "SP's".

**QUESTION TEXT:**

What was the amount of {your/SP's} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

**ENTER NUMBER**

| Range | 1 to 9999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA15A = 1-9999, go to BOX IA16A

---

**IA15B**  ia5ssrrspest  R5 IA15B ESTIMATE SP SS RR AMT

**QUESTION TEXT:**

SHOW CARD IA3

Please look at this card and tell me which is closest.

**CODES**

| 1 | LESS THAN $700, |
| 2 | $700 TO LESS THAN $1,000 |
| 3 | $1,000 TO LESS THAN $1,300 |
| 4 | $1,300 TO LESS THAN $1,600 |
| 5 | $1,600 OR MORE |
|  | REFUSED |
|  | DON'T KNOW |

---

**BOX IA16A**  BOXIA16A  NOT ON FILE

If IA14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA16A.
Otherwise, go to BOX IA17.

---

**IA16A**  ia5ssrrptamt  R5 IA16A PARTNER SS RR AMT

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

**QUESTION TEXT:**

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

**ENTER NUMBER**

Range                                                    1 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999.
Do not display the phrase 'Enter Number'.
If IA16A = 1-9999, go to BOX IA17

---

**IA16B**  ia5ssrrptest  R5 IA16B ESTIMT PARTNR SS RR AMT

**QUESTION TEXT:**

SHOW CARD IA3

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $700, |
| 2 | $700 TO LESS THAN $1,000 |
| 3 | $1,000 TO LESS THAN $1,300 |
| 4 | $1,300 TO LESS THAN $1,600 |
| 5 | $1,600 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA17**  BOXIA17  NOT ON FILE

If IA4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IA17.
Else if IA4 = 1 (SP RECEIVED SSI), go to IA18A.
Else if IA4 = 2 (SPOUSE RECEIVED SSI), go to IA19A.
 Otherwise, go to BOX IA20.

---

**IA17**             **ia5ssipymnt**             R5 IA17 RECENT MTHLY SSI PAYMENT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly SSI payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA18A |
| | REFUSED | IA17B |
| | DON'T KNOW | IA17B |

---

**IA17A**             **ia5ssijtamt**             R5 IA17A JOINT SSI AMT

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

**ENTER NUMBER**

Range                                                         1 to 9999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999.

Do not display the phrase 'Enter Number'.
If IA17A = 1-9999, go to BOX IA20.

---

**IA17B**             **ia5ssijtest**             R5 IA17B ESTIMATE JOINT SSI AMT

**QUESTION TEXT:**

SHOW CARD IA4

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $300, | BOX IA20 |
| 2 | $300 TO LESS THAN $700, | BOX IA20 |
| 3 | $700 TO LESS THAN $1000 | BOX IA20 |
| 4 | $1000 OR MORE | BOX IA20 |
| | REFUSED | BOX IA20 |
| | DON'T KNOW | BOX IA20 |

**IA18A**                 **ia5ssispamt**              R5 IA18A SP SSI AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display
"your". Otherwise, display "SP's".

**QUESTION TEXT:**

What was the amount of {your/SP's} most recent monthly SSI payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP SSI AMOUNT

**ENTER NUMBER**

Range                                             1 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA18A = 1-9999, go to BOX IA19A.

**IA18B**                 **ia5ssispest**              R5 IA8B ESTIMATE SP SSI AMOUNT

**QUESTION TEXT:**

SHOW CARD IA5

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $100, |
| 2 | $100 TO LESS THAN $200 |
| 3 | $200 TO LESS THAN $400 |
| 4 | $400 TO LESS THAN $700 |
| 5 | $700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**BOX IA19A**             **BOXIA19A**               NOT ON FILE

If IA17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA19A.
Otherwise, go to BOX IA20.

**IA19A**          **ia5ssiptamt**          R5 IA19A PARTNR SSI AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

**QUESTION TEXT:**

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly SSI payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SSI AMOUNT

**ENTER NUMBER**

Range                                                          1 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999.
Do not display the phrase 'Enter Number'.
If IA19A = 1-9999, go to BOX IA20.

---

**IA19B**          **ia5ssiptest**          R5 IA19B ESTIMATE PARTNR SSI AMT

**QUESTION TEXT:**

SHOW CARD IA5

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $100, |
| 2 | $100 TO LESS THAN $200 |
| 3 | $200 TO LESS THAN $400 |
| 4 | $400 TO LESS THAN $700 |
| 5 | $700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA20**          **BOX IA20**          NOT ON FILE

If IA5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IA20.
Else if IA5 = 1 (SP RECEIVED VA), go to IA21A.
Else if IA5 = 2 (SPOUSE RECEIVED VA), go to IA22A.
Otherwise, go to BOX IA23.

---

**IA20**          **ia5vapymnt**          R5 IA20 RECENT MNTHLY VA PAYMENT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA21A |
| | REFUSED | IA20B |
| | DON'T KNOW | IA20B |

---

## IA20A             ia5vajtamt              R5 IA20A JOINT VA AMOUNT

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT

**ENTER NUMBER**

Range                                                          1 to 9999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999

Do not display the phrase 'Enter Number'.
If IA20A = 1-9999, go to BOX IA23.

---

## IA20B             ia5vajtest              R5 IA20B ESTIMAT JOINT VA AMOUNT

**QUESTION TEXT:**

SHOW CARD IA6

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $1000, | BOX IA23 |
| 2 | $1000 TO LESS THAN $1,400 | BOX IA23 |
| 3 | $1,400 TO LESS THAN $1,800 | BOX IA23 |
| 4 | $1,800 TO LESS THAN $2,200 | BOX IA23 |
| 5 | $2,200 OR MORE | BOX IA23 |
| | REFUSED | BOX IA23 |

---

**IA21A**                 **ia5vaspamt**                R5 IA21A SP VA AMOUNT

**DISPLAY INSTRUCTIONS:**

    If PROXY flag <> 1 (YES), display
    "your". Otherwise, display "SP's".

**QUESTION TEXT:**

> What was the amount of {your/SP's} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH – 1})?
>
> IF NEEDED:  We don't need an exact dollar amount.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP VA AMOUNT

**ENTER NUMBER**

    Range                                              1 to 9999
    REFUSED
    DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

    Range: $1-$9,999
    Do not display the phrase 'Enter Number'.
    If IA21A = 1-9999, go to BOX IA22A.

---

**IA21B**                 **ia5vaspest**                R5 IA21B ESTIMATE SP VA AMOUNT

**QUESTION TEXT:**

> SHOW CARD IA7
>
> Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $500 |
| 2 | $500 TO LESS THAN $700 |
| 3 | $700 TO LESS THAN $900 |
| 4 | $900 TO LESS THAN $1,100 |
| 5 | $1,100 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA22A**             **BOX IA22A**                NOT ON FILE

> If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22A.
> Otherwise, go to BOX IA23.

---

**IA22A**             **ia5vaptamt**             R5 IA22A PARTNER VA AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

**QUESTION TEXT:**

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER VA AMOUNT

**ENTER NUMBER**

Range                                     1 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999.
Do not display the phrase 'Enter Number'.
If IA22A = 1-9999, go to BOX IA23.

---

**IA22B**             **ia5vaptest**             R5 IA22B ESTIMATE PARTNR VA AMT

**QUESTION TEXT:**

SHOW CARD IA7

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $500 |
| 2 | $500 TO LESS THAN $700 |
| 3 | $700 TO LESS THAN $900 |
| 4 | $900 TO LESS THAN $1,100 |
| 5 | $1,100 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA23**          **BOX IA23**             NOT ON FILE

If IA6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IA23.
Else if IA6 = 1 (SP RECEIVED PENSION PLAN), go to IA24A.
Else if IA6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IA25A.
Otherwise, go to BOX IA26.

**IA23**     **ia5penpymt**     R5 IA23 RCNT MTH JOBPENSION PYMT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**
| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA24A |
| | REFUSED | IA23B |
| | DON'T KNOW | IA23B |

---

**IA23A**     **ia5penjtamt**     R5 IA23A JOINT JOB PENSION AMT

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT

**ENTER NUMBER**

Range                                             1 to 9999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA23A = 1-9999, go to BOX IA26.

---

**IA23B**     **ia5penjtest**     R5 IA23B EST JOINT JOB PENSN AMT

**QUESTION TEXT:**

SHOW CARD IA8

Please look at this card and tell me which is closest.

**CODES**
| | | |
|---|---|---|
| 1 | LESS THAN $600, | BOX IA26 |
| 2 | $600 TO LESS THAN $1,300 | BOX IA26 |
| 3 | $1,300 TO LESS THAN $2,100 | BOX IA26 |
| 4 | $2,100 TO LESS THAN $5,900 | BOX IA26 |

| 5 | $5,900 OR MORE | BOX IA26 |
|---|---|---|
|   | REFUSED | BOX IA26 |
|   | DON'T KNOW | BOX IA26 |

---

**IA24A**  ia5penspamt  R5 IA24A SP JOB PENSION AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you have" and your".
Otherwise, display "SP has" and "SP's".

If IA23=2, (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/SP has} a job-related pension plan." and "this".

**QUESTION TEXT:**

{You told me earlier that {you have/SP has} a job-related pension plan.} In all, how much was received from {{your/SP's} job-related /this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP PENSION PLAN AMOUNT

**ENTER NUMBER**

| | | |
|---|---|---|
| Range | | 1 to 9999 |
| REFUSED | | |
| DON'T KNOW | | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA24A = 1-9999, go to BOX IA25A.

---

**IA24B**  ia5penspest  R5 IA24B EST SP JOB PENSION AMT

**QUESTION TEXT:**

SHOW CARD IA9

Please look at this card and tell me which is closest.

**CODES**

| 1 | LESS THAN $400 |
|---|---|
| 2 | $400 TO LESS THAN $900 |
| 3 | $900 TO LESS THAN $1,600 |
| 4 | $1,600 TO LESS THAN $3,800 |
| 5 | $3,800 OR MORE |
|   | REFUSED |
|   | DON'T KNOW |

---

**BOX IA25A**  BOX IA25A  NOT ON FILE

If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25A.
Otherwise, go to BOX IA26.

---

## IA25A        ia5pentamt        R5 IA25A PARTNR JOB PENSN AMOUNT

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has" and "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If IA23 = 2 (ENTER SP and SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan" and "this".

**QUESTION TEXT:**

{You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan.} In all, how much was received from {{your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} job- related/this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT

**ENTER NUMBER**

Range                                1 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

---

## IA25B        ia5penptest        R5 IA25B EST PARTNR JOB PEN AMT

**QUESTION TEXT:**

SHOW CARD IA9

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $400 |
| 2 | $400 TO LESS THAN $900 |
| 3 | $900 TO LESS THAN $1,600 |
| 4 | $1,600 TO LESS THAN $3,800 |
| 5 | $3,800 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**BOX IA26** BOX IA26 NOT ON FILE

> If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA26.
> Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA27A.
> Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA28A.
> Otherwise, go to BOX IA35.

---

**IA26**　　　　ia5retworth　　　　R5 IA26 RETIREMENT ACCOUNT WORTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "currently" in underlined text.

**QUESTION TEXT:**

> This next question is a bit different. You mentioned that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have retirement accounts. In total, about how much is currently in all of these retirement accounts?
>
> IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.
>
> IF NEEDED: We don't need an exact dollar amount.
>
> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
>
> understand how people manage financially as they age and what effect this might have on their
>
> health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA27A |
| | REFUSED | IA26B |
| | DON'T KNOW | IA26B |

---

**IA26A**　　　　ia5retjtwrt　　　　R5 IA26A JOINT RETIR ACCT WORTH

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

**ENTER NUMBER**

Range　　　　　　　　　　　　　　　1 to 9999999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.

If IA26A = 1-9999999, go to BOX IA29.

---

| **IA26B** | **ia5retjtest** | R5 IA26B EST JOINT RET ACCT WRTH |
|-----------|-----------------|----------------------------------|

**QUESTION TEXT:**

> SHOW CARD IA10
>
> Please look at this card and tell me which is closest.

**CODES**

| 1 | LESS THAN $34,000 | BOX IA29 |
|---|---|---|
| 2 | $34,000 TO LESS THAN $82,000 | BOX IA29 |
| 3 | $82,000 TO LESS THAN $175,000 | BOX IA29 |
| 4 | $175,000 TO LESS THAN $413,000 | BOX IA29 |
| 5 | $413,000 OR MORE | BOX IA29 |
|  | REFUSED | BOX IA29 |
|  | DON'T KNOW | BOX IA29 |

---

| **IA27A** | **ia5retspwrt** | R5 IA27A SP RETIREMENT ACCT WRTH |
|-----------|-----------------|----------------------------------|

**DISPLAY INSTRUCTIONS:**

> If PROXY flag <> 1 (YES), display "you have".
> Otherwise, display "SP has".
>
> Display "currently" in underlined text.

**QUESTION TEXT:**

> This next question is a bit different. You mentioned that {you have/SP has} retirement accounts.
> In total, about how much is currently in all of these retirement accounts?
>
> IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.
>
> IF NEEDED: We don't need an exact dollar amount.
>
> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP RETIREMENT ACCOUNT AMOUNT

**ENTER NUMBER**

| Range | 1 to 9999999 |
|-------|--------------|
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

> Range: $1-$9,999,999
> Do not display the phrase 'Enter Number'.
> If IA27A = 1-9,999,999, go to BOX IA28A.

---

| **IA27B** | **ia5retspest** | R5 IA27B EST SP RET ACCT WORTH |
|-----------|-----------------|--------------------------------|

**QUESTION TEXT:**

> SHOW CARD IA11

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $20,000 |
| 2 | $20,000 TO LESS THAN $47,000 |
| 3 | $47,000 TO LESS THAN $92,000 |
| 4 | $92,000 TO LESS THAN $218,000 |
| 5 | $218,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA28A**         **BOXIA28A**         NOT ON FILE

If IA26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA28A.
Otherwise, go to BOX IA29.

---

**IA28A**         **ia5retptwrt**         R5 IA28A PRTNR RET ACCT WORTH

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

Display "currently" in underlined text.

**QUESTION TEXT:**

This next question is a bit different. You mentioned that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$999,999
Do not display the phrase 'Enter Number'.
If IA28A = 1-999999, go to BOX IA29.

---

**IA28B**         **ia5retptest**         R5 IA28B EST PARTNR ACCT WORTH

**QUESTION TEXT:**

SHOW CARD IA11

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $20,000 |
| 2 | $20,000 TO LESS THAN $47,000 |
| 3 | $47,000 TO LESS THAN $92,000 |
| 4 | $92,000 TO LESS THAN $218,000 |
| 5 | $218,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA29**        BOX IA29        NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA29.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA30A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA31A.
Otherwise, go to BOX IA35.

---

**IA29**        ia5rtlmwdrw        R5 IA29 RETRMNT WDRW AMT LST MTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "Last month" in underlined text.

**QUESTION TEXT:**

Last month, how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts (for the month of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA30A |
| | REFUSED | IA29B |
| | DON'T KNOW | IA29B |

---

**IA29A**        ia5rtlmjtwdr        R5 IA29A JOINT RET WDRW LST MTH

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

**ENTER NUMBER**

      Range                                   0 to 99999

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999
Do not display the phrase 'Enter Number'.
If IA29A = 0-99,999, go to BOX IA32.

---

## IA29B          **ia5rtlmjtest**          R5 IA29B EST JONT RET WDR LS MTH

**DISPLAY INSTRUCTIONS:**

Display "last month" in underlined text.

**QUESTION TEXT:**

> SHOW CARD IA12
>
> Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $200 | BOX IA32 |
| 2 | $200 TO LESS THAN $500 | BOX IA32 |
| 3 | $500 TO LESS THAN $1,000 | BOX IA32 |
| 4 | $1,000 TO LESS THAN $2,500 | BOX IA32 |
| 5 | $2,500 OR MORE | BOX IA32 |
| | REFUSED | BOX IA32 |
| | DON'T KNOW | BOX IA32 |

---

## IA30A          **ia5rtlmspwdr**          R5 IA30A SP RET WDRWL LAST MONTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "Last month" in underlined text.

**QUESTION TEXT:**

> Last month, how much altogether did {you/SP} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH – 1})?
>
> IF NEEDED:  We don't need an exact dollar amount.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP RETIREMENT ACCOUNT  RECEIVED/WITHDRAWN AMOUNT

**ENTER NUMBER**

      Range                             0 to 99999
      REFUSED
      DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999
Do not display the phrase 'Enter Number'.
If IA30A = 0-99999, go to BOX IA31A.

---

**IA30B**                    ia5rtlmspest                    R5 IA30B EST SP RET WDR LST MNTH

**QUESTION TEXT:**

SHOW CARD IA13

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $100 |
| 2 | $100 TO LESS THAN $300 |
| 3 | $300 TO LESS THAN $700 |
| 4 | $700 TO LESS THAN $1,700 |
| 5 | $1,700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA31A**              BOX IA3A                    NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31A.
Otherwise, go to BOX IA32.

---

**IA31A**                   ia5rtlmptwdr                   R5 IA31A PARTNR RET WDR LST MTH

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}" and "{his/her}".

Display "Last month" in underlined text.

**QUESTION TEXT:**

Last month, how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999

Do not display the phrase 'Enter Number'.
If IA31A = 0-99,999, go to BOX IA32.

---

**IA31b**                 **ia5rtlmptest**                 R5 IA31B EST PARTNR WDR LST MTH

**QUESTION TEXT:**

SHOW CARD IA13

Please look at this card and tell me which is closest.

**CODES**

1     LESS THAN $100
2     $100 TO LESS THAN $300
3     $300 TO LESS THAN $700
4     $700 TO LESS THAN $1,700
5     $1,700 OR MORE
      REFUSED
      DON'T KNOW

---

**BOX IA32**                 **BOXIA32**                 NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA32.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA33A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA34A.
Otherwise, go to BOX IA35.

---

**IA32**                 **ia5rtyrwdrw**                 R5 IA32 RETRMNT WDRWL AMT LST YR

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last year" in underlined text.

**QUESTION TEXT:**

Now thinking about all of last year (that is calendar year {CURRENT YEAR – 1}), how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

1     ENTER COMBINED AMOUNT
2     ENTER SP AND SPOUSE/PARTNER AMOUNTS          IA33A
      SEPARATELY

                                                    IA32B

REFUSED                                  IA32B
DON'T KNOW

---

## IA32A          **ia5rtyrjtamt**          R5 IA32A AMT JOINT RET WDR LS YR

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

**ENTER NUMBER**

         Range                              0 to 9999999

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$9,999,999
Do not display the phrase 'Enter Number'.
If IA32A = 0-9999999, go to BOX IA35.

---

## IA32B          **ia5rtyrjtest**          R5 IA32B EST JOINT RET WDR LS YR

**QUESTION TEXT:**

SHOW CARD IA14

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $2,400 | BOX IA35 |
| 2 | $2,400 TO LESS THAN $6,000 | BOX IA35 |
| 3 | $6,000 TO LESS THAN $12,000 | BOX IA35 |
| 4 | $12,000 TO LESS THAN $30,000 | BOX IA35 |
| 5 | $30,000 OR MORE | BOX IA35 |
| | REFUSED | BOX IA35 |
| | DON'T KNOW | BOX IA35 |

---

## IA33A          **ia5rtyrspamt**          R5 IA33A SP AMT RCVWDR RET LS YR

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "last year" in underlined text.

**QUESTION TEXT:**

Now thinking about all of last year (that is calendar year {CURRENT YEAR – 1}), how much altogether did {you/SP} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

**ENTER NUMBER**

        Range                                  0 to 9999999
        REFUSED
        DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

    Range: $0-$9,999,999
    Do not display the phrase 'Enter Number'.
    If IA33A = 0-9999999, go to BOX IA34A.

---

| **IA33B** | **ia5rtyrspest** | R5 IA33B EST SP RCVWDR RET LS YR |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD IA15

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $1,200 |
| 2 | $1,200 TO LESS THAN $3,600 |
| 3 | $3,600 TO LESS THAN $8,400 |
| 4 | $8,400 TO LESS THAN $20,400 |
| 5 | $20,400 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX IA34A** | **BOX IA34A** | NOT ON FILE |
|---|---|---|

If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34A.
Otherwise, go to BOX IA35.

---

| **IA34A** | **ia5rtyrptamt** | R5 IA34A PARTNR RCVWDR RET LS YR |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}" and "{his/her}".

Display "last year" in underlined text.

**QUESTION TEXT:**

Now thinking about all of last year (that is calendar year {CURRENT YEAR – 1}), how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT

**ENTER NUMBER**

<table>
<tr><td>Range</td><td>0 to 9999999</td></tr>
<tr><td>REFUSED</td><td></td></tr>
<tr><td>DON'T KNOW</td><td></td></tr>
</table>

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$9,999,999
Do not display the phrase 'Enter Number'.
If IA34A = 0-9999999, go to BOX IA35.

---

| **IA34B** | **ia5rtyrptest** | R5 IA34B EST PRTNR WDR RET LS YR |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD IA15

Please look at this card and tell me which is closest.

**CODES**

| 1 | LESS THAN $1,200 |
|---|---|
| 2 | $1,200 TO LESS THAN $3,600 |
| 3 | $3,600 TO LESS THAN $8,400 |
| 4 | $8,400 TO LESS THAN $20,400 |
| 5 | $20,400 OR MORE REFUSED |
| | DON'T KNOW |

---

| **BOX IA35** | **BOX IA35** | NOT ON FILE |
|---|---|---|

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), go to IA35.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS), go to IA36A.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

---

| **IA35** | **ia5skbdwrth** | R5 IA35 NONRETR STKS BNDS WRTH |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

**QUESTION TEXT:**

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME

LASTNAME} own {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts.  About how much are these worth?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA36A |
| | REFUSED | BOX IA35B |
| | DON'T KNOW | BOX IA35B |

---

| **IA35A** | **ia5skbdjtwrt** | R5 IA35A JOINT STKS BNDS WRTH |
|---|---|---|

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE'S/PARTNER MUTUAL FUNDS/STOCKS/BONDS AMOUNT

**ENTER NUMBER**

Range                                                    1 to 9999999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA35A = 1-9999999, go to BOX IA38.

---

| **BOX IA35B** | **BOXIA35B** | NOT ON FILE |
|---|---|---|

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8= 3 (JOINT MUTUAL FUNDS), go to IA35b.
Otherwise, go to IA35c.

---

| **IA35b** | **ia5skbdjtest** | R5 IA35B EST JOINT STKS BNDS WRT |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD IA16

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $9,000 | BOX IA38 |
| 2 | $9,000 TO LESS THAN $18,000 | BOX IA38 |
| 3 | $18,00 TO LESS THAN $93,000 | BOX IA38 |
| 4 | $93,00 TO LESS THAN $350,000 | BOX IA38 |
| 5 | $350,000 OR MORE | BOX IA38 |
| | REFUSED | BOX IA38 |
| | DON'T KNOW | BOX IA38 |

**IA35C**          **ia5bndjtest**          R5 IA35C EST JOINT ONLY BNDS WRT

**QUESTION TEXT:**

SHOW CARD IA17

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $600 | BOX IA38 |
| 2 | $600 TO LESS THAN $5,000 | BOX IA38 |
| 3 | $5,000 TO LESS THAN $16,000 | BOX IA38 |
| 4 | $16,000 TO LESS THAN $62,000 | BOX IA38 |
| 5 | $62,000 OR MORE | BOX IA38 |
| | REFUSED | BOX IA38 |
| | DON'T KNOW | BOX IA38 |

---

**IA36A**          **ia5skbdspwrt**          R5 IA36A SP STKS BONDS WRTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you own".
Otherwise, display "SP owns".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

**QUESTION TEXT:**

You told me earlier that {you own/SP owns} {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 9999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA36A = 1-9999999, go to BOX IA37A.

---

**BOX IA36b**          **BOXIA36b**          NOT ON FILE

If IA8 = 1 (SP MUTUAL FUNDS), go to IA36b.
Otherwise, go to IA36c.

**IA36B**  **ia5skbdspest**  R5 IA36B EST SP STKS BNDS WRTH

**QUESTION TEXT:**

SHOW CARD IA18

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $8,000 | BOX IA37A |
| 2 | $8,000 TO LESS THAN $62,000 | BOX IA37A |
| 3 | $62,000 TO LESS THAN $192,000 | BOX IA37A |
| 4 | $192,000 TO LESS THAN $213,000 | BOX IA37A |
| 5 | $213,000 OR MORE | BOX IA37A |
| | REFUSED | BOX IA37A |
| | DON'T KNOW | BOX IA37A |

**IA36C**  **ia5bndspest**  R5 IA36C EST SP ONLY BNDS WRTH

**QUESTION TEXT:**

SHOW CARD IA19

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $300 |
| 2 | $300 TO LESS THAN $2,500 |
| 3 | $2,500 TO LESS THAN $8,000 |
| 4 | $8,000 TO LESS THAN $37,000 |
| 5 | $37,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**BOX IA37A**  **BOX IA37A**  NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

**IA37a**  **ia5skbdptwrt**  R5 IA37A PARTNR STKS BNDS WRTH

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you own".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns".

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between each one.

**QUESTION TEXT:**

You told me earlier that {you own/{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns} {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 9999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA37A = 1-9999999, go to BOX IA38.

---

**BOX IA37b**          **BOXIA37b**          NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS), go to IA37b.
Otherwise, go to IA37c.

---

**IA37B**          **ia5skbdptest**          R5 IA37B PART EST STKS BNDS WRTH

**QUESTION TEXT:**

SHOW CARD IA18

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $8,000 | BOX IA38 |
| 2 | $8,000 TO LESS THAN $62,000 | BOX IA38 |
| 3 | $62,000 TO LESS THAN $192,000 | BOX IA38 |
| 4 | $192,000 TO LESS THAN $213,000 | BOX IA38 |
| 5 | $213,000 OR MORE | BOX IA38 |
| | REFUSED | BOX IA38 |
| | DON'T KNOW | BOX IA38 |

---

**IA37C**          **ia5bndptest**          R5 IA37C PART EST ONLY BNDS WRTH

**QUESTION TEXT:**

SHOW CARD IA19

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $300 |
| 2 | $300 TO LESS THAN $2,500 |

| 3 | $2,500 TO LESS THAN $8,000 | |
| 4 | $8,000 TO LESS THAN $37,000 | |
| 5 | $37,000 OR MORE | |
| | REFUSED | |
| | DON'T KNOW | |

---

## BOX IA38

**BOX IA38**　　　　　　　　NOT ON FILE

> If [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or
> [IA10B = 1 (SP SAVINGS) and IA10B= 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or
> [IA10C= 1 (SP CDS) and IA10C= 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA38.
> Else if IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), go to IA39A.
> Else if IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to
> IA40A.
> Otherwise, go to BOX IA41.

---

## IA38

**ia5bkcdwrth**　　　　　　R5 IA38 BANK ACCT CD WORTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA10A = 1 (SP CHECKING) or IA10A = 2 (SPOUSE CHECKING) or IA10A = 3 (JOINT CHECKING), display "checking accounts".
If IA10B = 1 (SP SAVINGS) or IA10B = 2 (SPOUSE SAVINGS) or IA10B = 3 (JOINT SAVINGS), display "savings or money market accounts".
If IA10C = 1 (SP CDS) or IA10C = 2 (SPOUSE CDS) or IA10C = 3 (JOINT CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

**QUESTION TEXT:**

> You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have {checking accounts} {savings or money market accounts} {certificates of deposit or CDs}.
>
> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH – 1})?
>
> IF NEEDED: We don't need an exact dollar amount.
>
> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA39A |
| | REFUSED | BOX IA38B |
| | | BOX IA38B |

DON'T KNOW

---

**IA38A**                 **ia5bkcdjtwrt**                 R5 IA38A JOINT BNK ACCT CD WRTH

**QUESTION TEXT:**

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

**ENTER NUMBER**

Range                                   1 to 9999999

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA38A = 1-9,999,999, go to BOX IA41a.

---

**BOX IA38B**             **BOX IA38B**             NOT ON FILE

If IA10C = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38B.
Otherwise, go to IA38C.

---

**IA38B**                 **ia5bkcdjtest**                 R5 IA38B EST JOINT BNK CD WRTH

**QUESTION TEXT:**

SHOW CARD IA20

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $11,000 | BOX IA41 |
| 2 | $11,000 TO LESS THAN $25,000 | BOX IA41 |
| 3 | $25,000 TO LESS THAN $50,000 | BOX IA41 |
| 4 | $50,000 TO LESS THAN $108,000 | BOX IA41 |
| 5 | $108,000 OR MORE | BOX IA41 |
| | REFUSED | BOX IA41 |
| | DON'T KNOW | BOX IA41 |

---

**IA38C**                 **ia5bnkjtest**                 R5 IA38C EST JOINT BNK NO CD WRT

**QUESTION TEXT:**

SHOW CARD IA21

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $2,000 | BOX IA41 |
| 2 | $2,000 TO LESS THAN $7,000 | BOX IA41 |
| 3 | $7,000 TO LESS THAN $17,000 | BOX IA41 |
| 4 | $17,000 TO LESS THAN $57,000 | BOX IA41 |
| 5 | $57,000 OR MORE | BOX IA41 |

|  | REFUSED | BOX IA41 |
|--|---------|----------|
|  | DON'T KNOW | BOX IA41 |

---

| **IA39A** | **ia5bkcdspwrt** | R5 IA39A SP BNK CDS WORTH |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

If IA10A = 1 (SP CHECKING), display "a checking account".
If IA10B = 1 (SP SAVINGS), display "a savings or money market account".
If IA10C = 1 (SP CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

**QUESTION TEXT:**

You told me earlier that {you have/SP has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH – 1})?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP ACCOUNTS TOTAL AMOUNT

**ENTER NUMBER**

| Range | 1 to 9999999 |
|-------|--------------|
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA39A = 1-9,999,999, go to BOX IA40A.

---

| **BOX IA39B** | **BOX IA39B** | NOT ON FILE |

If IA10C = 1 (SP CDs), go to IA39B.
Otherwise, go to IA39c.

---

| **IA39B** | **ia5bkcdspest** | R5 IA39B SP EST BNK ACCT CD WRTH |

**QUESTION TEXT:**

SHOW CARD IA22

Please look at this card and tell me which is closest.

| | | |
|---|---|---|
| 1 | LESS THAN $8,000 | BOX IA40A |
| 2 | $8,000TO LESS THAN $13,000 | BOX IA40A |
| 3 | $13,000TO LESS THAN $28,000 | BOX IA40A |
| 4 | $28,000 TO LESS THAN $54,000 | BOX IA40A |
| 5 | $54,000 OR MORE | BOX IA40A |
| | REFUSED | BOX IA40A |
| | DON'T KNOW | BOX IA40A |

---

**IA39C**  **ia5bnkspest**  R5 IA39C SP EST BNK NO CD WRTH

**QUESTION TEXT:**

> SHOW CARD IA23
>
> Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $500 |
| 2 | $500TO LESS THAN $1,900 |
| 3 | $1,900TO LESS THAN $5,000 |
| 4 | $5,000 TO LESS THAN $20,000 |
| 5 | $20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA40A**  **BOXIA40A**  NOT ON FILE

> If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA40A. Otherwise, go to BOX IA41.

---

**IA40A**  **ia5bkcdptwrt**  R5 IA40A PARTNR BNK ACCT CD WRTH

**DISPLAY INSTRUCTIONS:**

> If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
> Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".
>
> If IA10A = 2 (SPOUSE CHECKING), display "a checking account".
> If IA10B = 2 (SPOUSE SAVINGS), display "a savings or money market account".
> If IA10C = 2 (SPOUSE CDS), display "certificates of deposit or CDs".
>
> If more than one type of account displayed, display "and" between each one.
>
> Display "last month" in underlined text.

**QUESTION TEXT:**

> You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} {a checking account}{a savings or money market account}{certificates of deposit or CDs}.
>
> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH – 1})?
>
> IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

**ENTER NUMBER**

| | | |
|---|---|---|
| Range | | 1 to 9999999 |
| REFUSED | | |
| DON'T KNOW | | |

**PROGRAMMER INSTRUCTIONS:**

Range: $1-$9,999,999
Do not display the phrase 'Enter Number'.
If IA40A = 1-9,999,999, go to BOX IA41.

---

**BOX IA40B**            **BOX IA40B**            NOT ON FILE

If IA10C = 2 (SPOUSE CDS), go to IA40B.
Otherwise, go to IA40C.

---

**IA40B**            **ia5bkcdptest**            R5 IA40B EST PARTNR BNK CD WRTH

**QUESTION TEXT:**

SHOW CARD IA22

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $8,000 | BOX IA41A |
| 2 | $8,000 TO LESS THAN $13,000 | BOX IA41A |
| 3 | $13,000 TO LESS THAN $28,000 | BOX IA41A |
| 4 | $28,000 TO LESS THAN $54,000 | BOX IA41A |
| 5 | $54,000 OR MORE | BOX IA41A |
| | REFUSED | BOX IA41A |
| | DON'T KNOW | BOX IA41A |

---

**IA40C**            **ia5bnkptest**            R5 IA40C EST PART BNK NO CD WRTH

**QUESTION TEXT:**

SHOW CARD IA23

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $500 |
| 2 | $500 TO LESS THAN $1,900 |
| 3 | $1,900 TO LESS THAN $5,000 |
| 4 | $5,000 TO LESS THAN $20,000 |
| 5 | $20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**BOX IA41**                    **BOX IA41**                    NOT ON FILE

> If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or
> [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), or
> [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or
> [IA10B = 1 (SP SAVINGS) and IA10B = 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or
> [IA10C = 1 (SP CDS) and IA10C= 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA41.
> Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS) or IA10A = 1 (SP CHECKING) or IA10B = 1 (SP
> SAVINGS) or IA10c = 1 (SP CDS), go to IA42A.
> Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or
> IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43A.
> Otherwise, go to BOX IA44.

---

**IA41**              **ia5itdvinc**              R5 IA41 AMT INT DIV INCOME LS YR

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".
If [IA10A = 1 (SP CHECKING) or 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING)] or [IA10B = 1 (SP SAVINGS) or 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS)] or [IA10C = 1 (SP CDS) or 2 (SPOUSE CDS) or 3 (JOINT CDS)], display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

**QUESTION TEXT:**

> In the last year, how much interest and dividend income did {you/SP} and {SP FIRSTNAME
> LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have altogether from {mutual funds or stocks}
> {government, corporate, or other bonds} {bank accounts or CDs}?
>
> IF NEEDED:  We don't need an exact dollar amount.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to
> understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA42A |
| | REFUSED | IA41B |
| | DON'T KNOW | IA41B |

---

**IA41A**              **ia5itdvjtamt**              R5 IA41A JOINT INT DIV INC LS YR

**QUESTION TEXT:**

> ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT

**ENTER NUMBER**

Range                                                    0 to 99999

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999
Do not display the phrase 'Enter Number'.
If IA41A = 0-99999, go to BOX IA44.

---

| **IA41B** | **ia5itdvjtest** | R5 IA41B EST JNT INTDV INC LS YR |
|---|---|---|

**QUESTION TEXT:**

> SHOW CARD IA24
>
> Please look at this card and tell me which is closest.

**CODES**

| 1 | LESS THAN $200 | BOX IA44 |
|---|---|---|
| 2 | $200 TO LESS THAN $1,000 | BOX IA44 |
| 3 | $1,000 TO LESS THAN $4,000 | BOX IA44 |
| 4 | $4,000 TO LESS THAN $16,000 | BOX IA44 |
| 5 | $16,000 OR MORE | BOX IA44 |
|  | REFUSED | BOX IA44 |
|  | DON'T KNOW | BOX IA44 |

---

| **IA42A** | **ia5itdvspamt** | R5 IA42A SP INT DIV INCOME LS YR |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you".
Otherwise, display "SP".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), display "bonds".
If IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

**QUESTION TEXT:**

> In the last year, how much interest and dividend income did {you/SP} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?
>
> IF NEEDED: We don't need an exact dollar amount.
>
> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range                                                    0 to 9999
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$9,999
Do not display the phrase 'Enter Number'.
If IA42A = 0-9999, go to BOX IA43A.

---

**IA42B**                ia5itdvspest                R5 IA42B EST SP INTDIV INC LS YR

**QUESTION TEXT:**

SHOW CARD IA25

Please look at this card and tell me which is closest.

**CODES**

1        LESS THAN $400
2        $400 TO LESS THAN $1,000
3        $1,000 TO LESS THAN $2,000
4        $2,000 TO LESS THAN $11,000
5        $11,000 OR MORE
         REFUSED
         DON'T KNOW

---

**BOX IA43A**            BOXIA43A                NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43aA
Otherwise, go to BOX IA44.

---

**IA43A**                ia5itdvptamt                R5 IA43A PART INT DIV INC LS YR

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If IA8 = 2 (SPOUSE MUTUAL FUNDS,) display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "bonds".
If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

**QUESTION TEXT:**

In the last year, how much interest and dividend income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 9999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$9,999
Do not display the phrase 'Enter Number'.
If IA43A = 0-9999, go to BOX IA44.

---

## IA43B                ia5itdvptest                R5 IA43B ESTPRT INT DV INC LS YR

**QUESTION TEXT:**

SHOW CARD IA25

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $400 |
| 2 | $400 TO LESS THAN $1,000 |
| 3 | $1,000 TO LESS THAN $2,000 |
| 4 | $2,000 TO LESS THAN $11,000 |
| 5 | $11,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

## BOX IA44                BOX IA44                NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 =3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA44.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA45A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

---

## IA44                ia5brewrt                R5 IA44 BUSINESS REALESTATE WRTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home".

**QUESTION TEXT:**

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have a business, a farm, or real estate {other than {SP}'s home}.  If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA45A |
| | REFUSED | IA44B |
| | DON'T KNOW | IA44B |

---

**IA44A**            **ia5brejtwrt**            R5 IA44A JOINT BUS REAL WRTH

**QUESTION TEXT:**

ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

**ENTER NUMBER**

Range            0 to 99999999

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA44A = 0-99999999, go to BOX IA47.

---

**IA44B**            **ia5brejtest**            R5 IA44B EST JOINT BUS REAL WRTH

**QUESTION TEXT:**

SHOW CARD IA26

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $30,000 | BOX IA47 |
| 2 | $30,000 TO LESS THAN $101,000 | BOX IA47 |
| 3 | $101,000 TO LESS THAN $247,000 | BOX IA47 |
| 4 | $247,000 TO LESS THAN $703,000 | BOX IA47 |
| 5 | $703,000 OR MORE | BOX IA47 |
| | REFUSED | BOX IA47 |
| | DON'T KNOW | BOX IA47 |

---

**IA45A**            **ia5brespwrt**            R5 IA45A SP BUS REAL WRTH

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

**QUESTION TEXT:**

> You told me earlier that {you have/SP has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?
>
> IF NEEDED: We don't need an exact dollar amount.
>
> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA45A = 0-99999999, go to BOX IA46A.

---

**IA45B**　　　　　**ia5brespest**　　　　　R5 IA45B EST SP BUS REAL WRTH

**QUESTION TEXT:**

> SHOW CARD IA27
>
> Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $18,000 |
| 2 | $18,000 TO LESS THAN $68,0000 |
| 3 | $68,000 TO LESS THAN $122,000 |
| 4 | $122,000 TO LESS THAN $293,000 |
| 5 | $293,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**BOX IA46A**　　　　　**BOX IA46A**　　　　　NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

---

**IA46A**　　　　　**ia5breptwrt**　　　　　R5 IA46A PART BUS REAL WRTH

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

**QUESTION TEXT:**

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA46A = 0-99999999, go to BOX IA47.

---

| **IA46B** | **ia5breptest** | R5 IA46B EST PART BUS RE WRTH |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD IA27

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $18,000 |
| 2 | $18,000 TO LESS THAN $68,000 |
| 3 | $68,000 TO LESS THAN $122,000 |
| 4 | $122,000 TO LESS THAN $293,000 |
| 5 | $293,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX IA47** | **BOX IA47** | NOT ON FILE |
|---|---|---|

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA47.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA48A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
Otherwise, go to IA50.

---

| **IA47** | **ia5breiinc** | R5 IA47 BUS REALESTATE INC LS YR |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "In the last year" in underlined text.

**QUESTION TEXT:**

In the last year altogether, how much income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

**CODES**

| | | |
|---|---|---|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA48A |
| | REFUSED | IA47B |
| | DON'T KNOW | IA47B |

---

| **IA47A** | **ia5breijtamt** | R5 IA47A JOINT BUS RE INC LS YR |
|---|---|---|

**QUESTION TEXT:**

ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

**ENTER NUMBER**

Range                                                    0 to 99999999

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA47A = 0-99999999, go to BOX IA50.

---

| **IA47B** | **ia5breijtest** | R5 IA47B EST JNT BUS RE INC LSYR |
|---|---|---|

**QUESTION TEXT:**

SHOW CARD IA28

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $3,600 | IA50 |
| 2 | $3,600 TO LESS THAN $12,000 | IA50 |
| 3 | $12,000 TO LESS THAN $25,000 | IA50 |
| 4 | $25,000 TO LESS THAN $64,000 | IA50 |
| 5 | $64,000 OR MORE | IA50 |
| | REFUSED | IA50 |

---

| **IA48A** | **ia5breispamt** | R5 IA48A AMT SP BUS RE INC LS YR |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

> If PROXY flag <> 1 (YES) , display "you".
> Otherwise, display "SP".
>
> Display "In the last year" in underlined text.

**QUESTION TEXT:**

> In the last year altogether, how much income did {you/SP} receive from these businesses or property before any federal or state taxes were taken out?
>
> IF NEEDED:  We don't need an exact dollar amount.
>
> IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.
>
> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

> Range: $0-$99,999,999
> Do not display the phrase 'Enter Number'.
> If IA48A = 0-99999999, go to BOX IA49A.

---

| **IA48B** | **ia5breispest** | R5 IA48B EST SP BUS RE INC LS YR |
|---|---|---|

**QUESTION TEXT:**

> SHOW CARD IA29
>
> Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $3,600 |
| 2 | $3,600 TO LESS THAN $7,200 |
| 3 | $7,200 TO LESS THAN $14,000 |
| 4 | $14,000 TO LESS THAN $38,000 |
| 5 | $38,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

| **BOX IA49A** | **BOXIA49A** | NOT ON FILE |
|---|---|---|

> If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
> Otherwise, go to IA50.

---

**IA49A**  ia5breiptamt  R5 IA49A PART BUS RE INC LS YR

**DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}".

Display "in the last year" in underlined text.

**QUESTION TEXT:**

In the last year altogether, how much income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED:  We don't need an exact dollar amount.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA49A = 0-99999999, go to BOX IA50.

---

**IA49B**  ia5breiptest  R5 IA49B EST PRT BS RE INC LS YR

**QUESTION TEXT:**

SHOW CARD IA29

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $3,600 |
| 2 | $3,600 TO LESS THAN $7,200 |
| 3 | $7,200 TO LESS THAN $14,000 |
| 4 | $14,000 TO LESS THAN $38,000 |
| 5 | $38,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

**IA50**  

| | |
|---|---|
| ia5totincjt | R5 IA50 JOINT TOTAL INCOME |
| ia5toincimjf | R5 F IMPUTED JOINT TOTAL INC FLG |
| ia5toincimj1 | R5 IA50 IMPUTED JOINT TOTAL INC1 |
| ia5toincimj2 | R5 IA50 IMPUTED JOINT TOTAL INC2 |
| ia5toincimj3 | R5 IA50 IMPUTED JOINT TOTAL INC3 |
| ia5toincimj4 | R5 IA50 IMPUTED JOINT TOTAL INC4 |

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA1 = 1 (SP SS/RR) or 2 (SPOUSE SS/RR), display "Social Security or Railroad Retirement".
If IA4 = 1 (SP SSI) or 2 (SPOUSE SSI), display "Supplemental Security Income".
If IA5 = 1 (SP VA) or 2 (SPOUSE VA), display "the Veteran's Administration".
If IA6 = 1 (SP PENSION) or 2 (SPOUSE PENSION), display "a pension plan".
If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "any retirement accounts".
If IA8 = 1 (SP MUTUAL FUNDS), 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "bonds".
If IA10A = 1 (SP CHECKING), 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING) or IA10B = 1 (SP SAVINGS), 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS), display "bank accounts".
If IA10C = 1 (SP CDS), 2 (SPOUSE CDS) or 3 (JOINT CDS), display "CDs".
If IA13 = 1 (SP REAL ESTATE), 2 (SPOUSE REAL ESTATE) or 3 (JOINT REAL ESTATE), display "business, farm, or real estate".
If LF1 = 1 (SP WORK LAST WEEK) or LF2 = 1 (SP HAD JOB LAST WEEK) or LF3 = 1 (SP WORK LAST MONTH) or LF13 = 1 (SPOUSE WORK LAST MONTH), display "jobs".

If more than one income source displayed, display "and" between each one.

Display "last year" in underlined text.

**QUESTION TEXT:**

Now I want to ask about {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income for last year, that is, for the calendar year ending in December {CURRENT YEAR - 1} before any federal or state taxes were taken out.

Now think about that total income from:
{Social Security or Railroad Retirement} {Supplemental Security Income}
{the Veteran's Administration}
{a pension plan} {any retirement accounts}
{mutual funds or stocks} {bonds}
{bank accounts} {CDs} {business, farm or real estate}
{jobs} and from any other sources.

How much was {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income before taxes for last year (this is, for the 12 months ending in December {CURRENT YEAR - 1})?

IF NEEDED:  We don't need an exact dollar amount – the nearest $1,000 is fine.

IF NEEDED:  We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER TOTAL INCOME FOR LAST YEAR          [SECTION CO]

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 99999999 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Range: $0-$99,999,999
Do not display the phrase 'Enter Number'.
If IA50 = 0-99,999,999, go to Section CO.

---

**BOX IA51A**  BOXIA51A  NOT ON FILE

If SP MARITAL STATUS=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51A.
Otherwise, go to IA51B.

---

**IA51A**

| | |
|---|---|
| **ia5toincesjt** | R5 IA51A JOINT EST TOT INCOME |
| **ia5eincimjf** | R5 F IMPTD JOINT EST TOT INC FLG |
| **ia5eincimj1** | R5 IA51A IMP EST JOINT TOT INC1 |
| **ia5eincimj2** | R5 IA51A IMP EST JOINT TOT INC2 |
| **ia5eincimj3** | R5 IA51A IMP EST JOINT TOT INC3 |
| **ia5eincimj4** | R5 IA51A IMP EST JOINT TOT INC4 |
| **ia5eincimj5** | R5 IA51A IMP EST JOINT TOT INC5 |

**QUESTION TEXT:**

SHOW CARD IA30

Please look at this card and tell me which is closest.

**CODES**

| | | |
|---|---|---|
| 1 | LESS THAN $30,000 | SECTION CO |
| 2 | $30,000TO LESS THAN $43,000 | SECTION CO |
| 3 | $43,00TO LESS THAN $66,000 | SECTION CO |
| 4 | $66,000 TO LESS THAN $109,000 | SECTION CO |
| 5 | $109,000 OR MORE | SECTION CO |
| | REFUSED | SECTION CO |
| | DON'T KNOW | SECTION CO |

---

**IA51B**

| | |
|---|---|
| **ia5toincessg** | R5 IA51B SINGLE EST TOT INC |
| **ia5eincimsf** | R5 F IMPUTED SGL EST TOT INC FLG |
| **ia5eincims1** | R5 IA51B IMP EST SP SGL TOT INC1 |
| **ia5eincims2** | R5 IA51B IMP EST SP SGL TOT INC2 |
| **ia5eincims3** | R5 IA51B IMP EST SP SGL TOT INC3 |
| **ia5eincims4** | R5 IA51B IMP EST SP SGL TOT INC4 |
| **ia5eincims5** | R5 IA51B IMP EST SP SGL TOT INC5 |

**QUESTION TEXT:**

SHOW CARD IA31

Please look at this card and tell me which is closest.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $18,000 |
| 2 | $18,000TO LESS THAN $22,000 |
| 3 | $22,000TO LESS THAN $36,000 |
| 4 | $36,000 TO LESS THAN $56,000 |
| 5 | $56,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**
   Go to Section CO – Car Ownership.

---

**CO1**                          **co5owncartrv**                 R5 CO1 OWN ANY CARS TRUCKS VANS

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null<> 1 (YES) or PROXY ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has RELATIONSHIP =2 (SPOUSE/PARTNER)], display "Do you".

Otherwise, display "Does SP".

If HH1CURRENT INT MARITAL STATUS =1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {your/his/her} {husband/wife/partner}".

If HH1CURRENT INT MARITAL STATUS =2 (LIVING WITH A PARTNER), display "partner".

If ROSTER MEMBER with RELATIONSHIP =2 (SPOUSE/PARTNER) has SPOUSE GENDER=1 (MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "husband".

If ROSTER MEMBER with RELATIONSHIP =2 (SPOUSE/PARTNER) hasSPOUSE GENDER=2 (FEMALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "wife".

If SP GENDER=1 (MALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "husband".

If SP GENDER=2 (FEMALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "wife".

**QUESTION TEXT:**

{Do you/Does SP} {or {your/his/her} {husband/wife/partner}} own any cars, trucks, or vans?

IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | SECTION EW |
| | REFUSED | SECTION EW |
| | DON'T KNOW | SECTION EW |

---

**CO2**                          **co5manyvhcls**                 R5 CO2 HOW MANY VEHICLES OWN

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null<> 1 (YES) or ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".

Otherwise, display "does SP".

If CURRENT INT MARITAL STATUS HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {your/his/her} {husband/wife/partner}".

If CURRENT INT MARITAL STATUS HH1=2 (LIVING WITH A PARTNER), display "partner"

If ROSTER MEMBER with RELATIONSHIP =2 (SPOUSE/PARTNER) has SPOUSE GENDER=1 (MALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "husband".

If ROSTER MEMBER with RELATIONSHIP =2 (SPOUSE/PARTNER) has SPOUSE GENDER=2 (FEMALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "wife".

If SP GENDER=1 (MALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "husband".

If SP GENDER=2 (FEMALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "wife".

**QUESTION TEXT:**

How many vehicles {do you/does SP}{or {your/his/her}{husband/wife/partner}} own?

ENTER NUMBER OF VEHICLES

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 20 |
| Soft Range | 1 to 4 |
| REFUSED | SECTION EW |
| DON'T KNOW | SECTION EW |

**PROGRAMMER INSTRUCTIONS:**

Soft range: 1-4
Hard range: 1-20

---

**CO3**  co5valuevehi  R5 CO3 VALUE HOW MUCH WOLD BRING

**DISPLAY INSTRUCTIONS:**

If CO2=1, display "its", "it", and "it".

Otherwise, display "their", "they", and "them".

**QUESTION TEXT:**

Altogether, what is their present value, that is, about how much would they bring if {you/SP} sold them on today's market?  The nearest $1,000 is fine.

ENTER DOLLAR AMOUNT

$

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 1000000 |
| Soft Range | 1000 to 40000 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Soft range: $1000-$40000
Hard range: $0-$1000000
Use input mask in response field ($ 999,999,999) so that dollar sign is displayed and commas are inserted appropriately.
If a dollar amount is given, skip to Section EW – Economic Well-being.

---

**CO3A**  co5vehivalue  R5 CO3A VEHICLE VALUE

**QUESTION TEXT:**

SHOW CARD CO1

Please look at the card and tell me which is closest

**CODES**

| | |
|---|---|
| 1 | LESS THAN $2,500, |
| 2 | $2,500 TO LESS THAN $5,000 |
| 3 | $5,000 TO LESS THAN $10,000 |
| 4 | $10,000 TO LESS THAN $20,000 |
| 5 | $20,000 TO LESS THAN $50,000 |
| 6 | $50,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Keep dollar signs & punctuation for response options exactly as detailed above.

Go to Section EW – Economic Well-being.

---

## EW1      ew5pycredbal      R5 EW1 PAY OFF CREDIT CARD BALAN

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".

Otherwise display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP2 = 2 (HAVE TRADITIONAL MORTGAGE) or HP2 = 3 (HAVE REVERSE MORTGAGE), display "other kinds of".

**QUESTION TEXT:**

These next questions are about {other kinds of} debt.

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} usually pay off all credit card balances every month or only the minimum amount due?

**CODES**

| | | |
|---|---|---|
| 1 | PAY OFF BALANCE | EW5 |
| 2 | PAY MINIMUM | |
| 3 | PAY MORE THAN MINIMUM, BUT NOT ENTIRE BALANCE | |
| 4 | DON'T HAVE ANY CREDIT CARDS | EW5 |
| | REFUSED | |
| | DON'T KNOW | |

---

## EW2      ew5crecardeb      R5 EW2 TOTAL CREDIT CARD DEBT

**QUESTION TEXT:**

SHOW CARD EW1

Adding up all credit balances, please look at this card and tell me which is closest to what is owed.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $1,000 |
| 2 | $1,000 TO LESS THAN $2,000 |
| 3 | $2,000 TO LESS THAN $4,000 |
| 4 | $4,000 TO LESS THAN $6,000 |
| 5 | $6,000 TO LESS THAN $10,000 |
| 6 | $10,000 TO LESS THAN $20,000 |
| 7 | $20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

## EW3      ew5credcdmed      R5 EW3 CREDIT CARD MEDICAL CARE

**QUESTION TEXT:**

Is any of the amount owed on credit cards for medical care?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EW5 |
| | REFUSED | EW5 |
| | DON'T KNOW | EW5 |

---

# EW4　　　　　ew5amtcrdmed　　　　R5 EW4 AMT ON CARDS FOR MED CARE

**QUESTION TEXT:**

How much is for medical care? Would you say most, some, or a little of the amount owed?

**CODES**

| | |
|---|---|
| 1 | MOST |
| 2 | SOME |
| 3 | A LITTLE |
| | REFUSED |
| | DON'T KNOW |

---

# EW5　　　　　ew5medpaovtm　　　　R5 EW5 MED BILLS PAID OVERTIME

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "paid off over time" in underlined text.

**QUESTION TEXT:**

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any medical bills that are being paid off over time?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EW7 |
| | REFUSED | EW7 |
| | DON'T KNOW | EW7 |

---

# EW6　　　　　ew5ampadovrt　　　　R5 EW6 AMT FOR MED BIL OVR TIME

**QUESTION TEXT:**

SHOW CARD EW2

Please look at this card and tell me which is closest to that amount.

**CODES**

| | |
|---|---|
| 1 | LESS THAN $500 |

| | |
|---|---|
| 2 | $500 TO LESS THAN $1,000 |
| 3 | $1,000 TO LESS THAN $2,000 |
| 4 | $2,000 TO LESS THAN $4,000 |
| 5 | $4,000 TO LESS THAN $6,000 |
| 6 | $6,000 TO LESS THAN - $10,000 |
| 7 | $10,000 TO LESS THAN $20,000 |
| 8 | $20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

## EW7 ew5finhlpfam R5 EW7 FINANCIAL HELP FRM FAMILY

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3(DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "children or other".

**QUESTION TEXT:**

Family members often help each other out financially. The next questions are about last year, ending December 31, {CURRENT YEAR - 1 YEAR}.

Last year, did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive any financial help or financial gifts from {children or other} relatives, either regularly -- like every month -- or just every so often as needed?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EW11 |
| | REFUSED | EW11 |
| | DON'T KNOW | EW11 |

---

## BOX EW8 BOX EW8 NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), go to EW8.
Otherwise, go to EW10.

---

## EW8 ew5whohelfi1 R5 EW8 CHILD HELPED FINANCIALLY
ew5whohelfi2 R5 EW8 OTHER HELPED FINANCIALLY

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME/LASTNAME}'s".

If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

Was that one of {your/SP's} {or {SP FIRSTNAME/LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} children or someone else who helped out (financially)?

SELECT ALL THAT APPLY

**CODES**          **Code All That Apply**
1          CHILD/CHILDREN
2          SOMEONE ELSE                    EW10
          REFUSED                          EW10
          DON'T KNOW                       EW10

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply

---

# EW9          op5chhlpfin          R5 EW9 CHILDREN WHO HELP FINANCE

**DISPLAY INSTRUCTIONS:**

Display PERSON ROSTER members with relationship codes = 3 (DAUGHTER), 4 = (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

**QUESTION TEXT:**

Which children helped out (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

ENTER TEXT

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.

For each roster selection at EW9, set HELPEDSPFINANCIALLY flag =1 (YES) to person roster.

---

# EW10          ew5atchhelyr          R5 EW10 AMT FROM CHILDR LST YR

**QUESTION TEXT:**

SHOW CARD EW2

Please look at this card and tell me which is closest to the amount in {CURRENT YEAR – 1}.

**CODES**

1          LESS THAN $500
2          $500 TO LESS THAN $1,000
3          $1,000 TO LESS THAN $2,000
4          $2,000 TO LESS THAN $4,000
5          $4,000 TO LESS THAN $6,000
6          $6,000 TO LESS THAN - $10,000
7          $10,000 TO LESS THAN $20,000
8          $20,000 OR MORE

REFUSED
DON'T KNOW

---

**EW11**                    **ew5fingftfam**                R5 EW11 FINANCIAL GIFTS TO FAMILY

**DISPLAY INSTRUCTIONS:**
If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER)], display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8
(STEPSON), display "children or other".

**QUESTION TEXT:**
Last year, ending December 31, {CURRENT YEAR - 1 YEAR}, did {you/SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} give any financial help or financial gifts to
{children or other} relatives, either regularly -- like every month -- or just every so often as needed?

**CODES**
| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EW15 |
| | REFUSED | EW15 |
| | DON'T KNOW | EW15 |

---

**BOX EW12**                **BOX E12**                NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7
(STEPDAUGHTER), or 8 (STEPSON), go to EW12.
Otherwise, go to EW14.

---

**EW12**                    **ew5whregoth1**                R5 EW12 GAVE CHILD FINCL HLP

                           **ew5whregoth2**                R5 EW12 SP GAVE GRANDCHD FIN HLP

                           **ew5whregoth3**                R5 EW12 SP GAVE OTHR FINANCL HLP

**DISPLAY INSTRUCTIONS:**
If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'S".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**
Was that (financial) help to one of {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER
FIRSTNAME LASTNAME}'s} children, a grandchild, or someone else?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | CHILD/CHILDREN | |
| 2 | GRANDCHILD/GRANDCHILDREN | EW14 |
| 3 | SOMEONE ELSE | EW14 |
| | REFUSED | EW14 |
| | DON'T KNOW | EW14 |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply

---

# EW13        op5hlpchfin        R5 EW13 HELPED CHILDREN FINANCE

**DISPLAY INSTRUCTIONS:**

Display PERSON ROSTER members with relationship codes = 3 (DAUGHTER), 4 = (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

**QUESTION TEXT:**

Which children were helped (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

**ENTER TEXT**

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply

For each roster selection at EW13, set SPHELPEDFINANCIALLY flag = 1 (YES) to person roster.

---

# EW14        ew5amthlpgiv        R5 EW14 AMOUNT OF HELP GIVEN

**QUESTION TEXT:**

SHOW CARD EW2

Please look at this card and tell me which is closest to the amount in {CURRENT YEAR – 1}.

**CODES**

| 1 | LESS THAN $500 |
|---|---|
| 2 | $500 TO LESS THAN $1,000 |
| 3 | $1,000 TO LESS THAN $2,000 |
| 4 | $2,000 TO LESS THAN $4,000 |
| 5 | $4,000 TO LESS THAN $6,000 |
| 6 | $6,000 TO LESS THAN - $10,000 |
| 7 | $10,000 TO LESS THAN $20,000 |
| 8 | $20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

---

# BOX EW15        BOX E15        NOT ON FILE

---

**EW15**                    **ew5progneed1**          R5 EW15 SP RECEIVD FOOD STAMPS

                            **ew5progneed2**          R5 EW15 SP REC OTHR FOOD ASST

                            **ew5progneed3**          R5 EW15 SP REC GAS ENERGY ASST

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Use "Same Question Stem" display for EW15[a-c].
If at EW15a, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "in the last year" in bold underlined text.

**QUESTION TEXT:**

{[} There are several state and federal programs that help people in need.  In the last year, did {you/SP}
{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive help from any of
these programs? {]}

RESPONSE [1] a. Food stamps (also called the Supplemental Nutrition Assistance Program, or SNAP)?
RESPONSE [2] b. Other food assistance such as Meals-on-Wheels?
RESPONSE [3] c. Gas, electricity, or other energy assistance?

**CODES**

| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display "variable text" in the a-c sequence until all rows have been displayed.

---

**EW16**                    **ew5mealskip1**          R5 EW16 SKIP MEALS NO MONEY

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last month" in underlined text.

**QUESTION TEXT:**

We know people sometimes find it hard to make ends meet. Thinking about the last month, did {you/SP}

{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} skip any meals because there was not enough food, or money to buy food?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | EW18 |
| | REFUSED | EW18 |
| | DON'T KNOW | EW18 |

---

## EW17       ew5mealskip2       R5 EW17 SKIP MEALS HOW OFTEN

**DISPLAY INSTRUCTIONS:**
    If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
    Otherwise, display "SP".

    If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
    If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
    Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

    Display "last month" in underlined text.

**QUESTION TEXT:**
How many days in the last month did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} skip meals? Would you say nearly every day, more than half the days, several days, but less than half the days, or a few days?

**CODES**

| | |
|---|---|
| 1 | NEARLY EVERY DAY |
| 2 | MORE THAN HALF THE DAYS |
| 3 | SEVERAL DAYS (LESS THAN HALF) |
| 4 | A FEW DAYS |
| | REFUSED |
| | DON'T KNOW |

---

## EW18       ew5nopayhous       R5 EW18A NO MONEY FOR HOUSING

                         **ew5nopayutil**       R5 EW18B NO MONEY FOR UTILITIES

                         **ew5nopaymed**       R5 EW18C NO MONEY FOR MEDICAL

**DISPLAY INSTRUCTIONS:**
    Use "Same Question Stem" display for EW18[a-c].
    Display "last year" in underlined text.

    If at EW18a, do not display question text in brackets.
    Otherwise, display question text in brackets.

**QUESTION TEXT:**
{[}Were there times in the last year when {you/SP} did not have enough money to… {]}

RESPONSE [1] a. pay the rent or mortgage?
RESPONSE [2] b. pay utility bills (gas, electric)?
RESPONSE [3] c. pay medical or prescription drug bills

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display "variable text" in the a-c sequence until all rows have been displayed.

Go to Section HL – Helpers.

## BOX HL1PRE        BOX HL1PRE        NOT ON FILE

If no PERSON ROSTER MEMBERS are flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPSAROUNDINSIDE and
HELPSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEDWITHLAUNDRY and
HELPEDWITHSHOPPING and
HELPEDWITHMEALS and
HELPEDWITHBANKING and
HELPEDWITHMONEYMATTERS and
HELPEDTRACKMEDS and
SATINWITHDOCTOR and
HELPEDMAKEINSURANCEDECISIONS, go to Section LS – NLTCS Questions.

Else if the only PERSON ROSTER MEMBERS flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPSAROUNDINSIDE and
HELPSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEDWITHLAUNDRY and
HELPEDWITHSHOPPING and
HELPEDWITHMEALS and
HELPEDWITHBANKING and
HELPEDWITHMONEYMATTERS and
HELPEDTRACKMEDS and
SATINWITHDOCTOR and
HELPEDMAKEINSURANCEDECISIONS
are STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
HELPEDWITHMEALS), or MEALS ON WHEELS (for HELPEDWITHMEALS), go to Section LS – NLTCS
Questions.

Otherwise, go to HL1PRE.

## HL1PRE        HL1PRE        NOT NO FILE

**QUESTION TEXT:**

Next I have a few questions about the people who you said help {you/SP} with daily activities.

PRESS 1 AND ENTER TO CONTINUE

**ENTER TEXT**

         Length                             1

## BOX HL1      **op5ishelper**      R5 BXHL1 ELIGIBLE HL SECTION

> For each PERSON ROSTER MEMBER flagged = 1 (YES) for
> HELPSGOOUTSIDE or
> HELPSAROUNDINSIDE or
> HELPSOUTOF BED or
> TOOKPLACESMOSTOFTEN or
> TOOKPLACES or
> HELPSWITHEATING or
> HELPSWITHBATHING or
> HELPSWITHTOILETING or
> HELPSWITHDRESSING or
> HELPEDWITHLAUNDRY or
> HELPEDWITHSHOPPING or
> HELPEDWITHMEALS or
> HELPEDWITHBANKING or
> HELPEDWITHMONEYMATTERS or
> HELPEDTRACKMEDS or
> SATINWITHDOCTOR or
> HELPEDMAKEINSURANCEDECISIONs
> who is not a STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
> HELPEDWITHMEALS), or MEALS ON WHEELS (for HELPED WITH MEALS), set HELPER flag=1 (YES).
>
> Write HELPER flag to PERSON ROSTER for each roster member.
>
> Loop through HL1 and HL8 for each PERSON ROSTER MEMBER with a HELPER flag =1 (YES).

## HL1      **op5helpsched**      R5 HL1 HELP IS REG SCHEDULED

**QUESTION TEXT:**

> Does {PERSON ROSTER MEMBER FIRSTNAME LASTNAME} have a regular schedule, or does his/her
> schedule vary?

**CODES**

| | | |
|---|---|---|
| 1 | REGULAR | |
| 2 | VARIED | HL3 |
| | REFUSED | HL3 |
| | DON'T KNOW | HL3 |

**PROGRAMMER INSTRUCTIONS:**

> Write HELPSCHEDULE response to PERSON ROSTER for roster member.

## HL2      **op5numdayswk**      R5 HL2 NUM DAYS HELP PER WK

**QUESTION TEXT:**

> In the last month, on how many days per week did {PERSON ROSTER MEMBER FIRST NAME LASTNAME}
> help {you/SP}?
>
> ENTER NUMBER OF DAYS

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 7 |
| REFUSED | |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**

Write #DAYSHELPWEEK response to PERSON ROSTER for roster member.

---

**BOX HL3**             **BOX HO4**                NOT ON FILE

If HL2 = 0, go to BOX HL5.

Otherwise, go to HL4.

---

**HL3**                 **op5numdaysmn**           R5 HL3 NUM DAYS HELP PER MON

**QUESTION TEXT:**

In the last month, on how many days did {PERSON ROSTER MEMBER FIRST NAME LASTNAME} help {you/SP}?

ENTER NUMBER OF DAYS

**ENTER NUMBER**

Range                                           0 to 31
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Write #DAYSHELPMONTH response to PERSON ROSTER for roster member.

---

**BOX HL4**             **BOX HL4**                NOT ON FILE

If HL3 = 0, go to BOX HL5.

Otherwise, go to HL4.

---

**HL4**                 **op5numhrsday**           R5 HL4 NUM HRS HELP PER DAY

**QUESTION TEXT:**

On days when {PERSON ROSTER MEMBER FIRST NAME LASTNAME} helped, about how many hours per day did (he/she) help {you/SP}?

ENTER NUMBER OF HOURS

IF LESS THAN 1 HOUR, ENTER ZERO

**ENTER NUMBER**

Range                                           0 to 24
REFUSED
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Write #HOURSHELP response to PERSON ROSTER for roster member.

---

**BOX HL5**             **BOX HL5**                NOT ON FILE

If PERSON ROSTER member relationship = 2 (SPOUSE/PARTNER), go to BOX HL9.

Else if PERSON ROSTER member relationship = 31 (PAID AIDE/HOUSEKEEPER/EMPLOYEE), go to HL6.

Otherwise, go to HL5.

---

**HL5**  op5paidhelpr  R5 HL5 HELPER IS PAID

**QUESTION TEXT:**

Is {PERSON ROSTER MEMBER FIRST NAME LASTNAME} paid to provide this help?

IF NEEDED: By paid help, we mean paid by someone as part of a job. We will ask next who pays the person.

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | BOX HL9 |
| | REFUSED | BOX HL9 |
| | DON'T KNOW | BOX HL9 |

**PROGRAMMER INSTRUCTIONS:**

Write #PAIDHELP response to PERSON ROSTER for roster member.

---

**HL6**  op5sppayshlp  R5 HL6 SP PAYS FOR HELP

op5govpayshlp  R5 HL6 GOVT PAYS FOR HELP

op5inspayshlp  R5 HL6 INSUR PAYS FOR HELP

op5othpayshlp  R5 HL6 OTHER PAYS FOR HELP

**QUESTION TEXT:**

Is {PERSON ROSTER MEMBER FIRST NAME LASTNAME} paid by {you/SP}, {your/his/her} family, by a government program, by {your/his/her} insurance, or what?

SELECT ALL THAT APPLY

**CODES**  **Code All That Apply**

| | | |
|---|---|---|
| 1 | SP AND/OR FAMILY | BOX HL7 |
| 2 | GOVERNMENT PROGRAM | BOX HL7 |
| 3 | INSURANCE | BOX HL7 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | BOX HL7 |
| | DON'T KNOW | BOX HL7 |

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.
Write WHOPAYS response to PERSON ROSTER for roster member.

---

**HL6A**  HL6A  NOT ON FILE

**QUESTION TEXT:**

SPECIFY WHO PAYS FOR PERSON WHO HELPS {SP}.

Text 50 char

**ENTER TEXT**

Length  50

---

**BOX HL7**         BOX HL7         NOT ON FILE

> If HL6=1 (SP AND/OR FAMILY), go to HL7.
> Else if HL6=2 (GOVERNMENT PROGRAM), go to HL8.
> Otherwise, go to BOX HL9.

---

# HL7          op5payunit          R5 HL7 PAYMENT UNIT

**QUESTION TEXT:**

> How much did {you/SP} (and {your/his/her} family) pay {PERSON ROSTER MEMBER FIRST NAME
> LASTNAME} last month?
>
> INDICATE RESPONSE UNIT

**CODES**

| | | |
|---|---|---|
| 1 | HOURLY | |
| 2 | WEEKLY | HL7B |
| 3 | MONTHLY | HL7C |
| 4 | DID NOT PAY IN LAST MONTH | BOX HL8 |
| 91 | OTHER (SPECIFY) | HL7D |
| | REFUSED | BOX HL8 |
| | DON'T KNOW | BOX HL8 |

**PROGRAMMER INSTRUCTIONS:**

> Write PAYUNIT response to PERSON ROSTER for roster member.

---

# HL7A          op5hourlypay          R5 HL7A HOURLY AMOUNT PAID

**QUESTION TEXT:**

> ENTER HOURLY AMOUNT PAID
> $_____.___

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 999.99 |
| Soft Range | 5 to 50 |

**PROGRAMMER INSTRUCTIONS:**

> Write HOURLYAMOUNT response to PERSON ROSTER for roster member.
>
> If valid amount given, skip to Box HL8.

---

# HL7B          op5weeklypay          R5 HL7B WEEKLY AMOUNT PAID

**QUESTION TEXT:**

> ENTER WEEKLY AMOUNT PAID
> $_____

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 9999 |
| Soft Range | 50 to 1000 |

**PROGRAMMER INSTRUCTIONS:**

> Write WEEKLYAMOUNT response to PERSON ROSTER for roster member.

If valid amount given, skip to Box HL8.

---

## HL7C      op5monthlypay      R5 HL7C MONTHLY AMOUNT PAID

**QUESTION TEXT:**

ENTER MONTHLY AMOUNT PAID

$_____

**ENTER NUMBER**

| | |
|---|---|
| Range | 1 to 9999 |
| Soft Range | 50 to 5000 |

**PROGRAMMER INSTRUCTIONS:**

Write MONTHLYAMOUNT response to PERSON ROSTER for roster member.

Go to BOX HL8.

---

## HL7D      HL7D      NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER RATE OF PAYMENT.

**ENTER TEXT**

| | |
|---|---|
| Length | 50 |

---

## BOX HL8      BOX HL8      NOT ON FILE

If HL6=2 (GOVERNMENT PROGRAM), go to HL8.

Otherwise, go to Box HL9.

---

## HL8      op5progmpaid      R5 HL8 PROGRAM PAID FOR HELPER

**DISPLAY INSTRUCTIONS:**

Display ", also known as {STATE NAME FOR MEDICAID PROGRAM}" if state name for Medicaid is not "Medicaid".

**QUESTION TEXT:**

Do you know whether this program is Medicaid {, also known as {STATE MEDICAID PROGRAM NAME}}, Medicare, a state program, or something else?

**CODES**

| | | |
|---|---|---|
| 1 | MEDICAID | BOX HL9 |
| 2 | MEDICARE | BOX HL9 |
| 3 | STATE PROGRAM | BOX HL9 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | BOX HL9 |
| | DON'T KNOW | BOX HL9 |

**PROGRAMMER INSTRUCTIONS:**

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.
Write PROGRAMPAID response to PERSON ROSTER for roster member.

---

**HL8A**          HL8A                    NOT ON FILE                                        4/8/2019

**QUESTION TEXT:**

SPECIFY OTHER PROGRAM.

Text 50 char

**ENTER TEXT**

Length                                    50

---

**BOX HL9**          BOX HL9                NOT ON FILE

Go to HL1 for next PERSON ROSTER MEMBER with HELPER flag=1 (YES).
If no additional PERSON ROSTER MEMBER with HELPER flag=1 (YES), go to Section LS – NLTCS
Questions.

---

| Derived Variables From Items in HL Section | |
|---|---|
| **op5dhrsmth** | R5 D HL2 HL3 HL4 HRS HELP MONTH |

## LS1PRE      LS1PRE      NOT ON FILE

**QUESTION TEXT**

> The last few questions we have for you may sound very similar to what you have heard already, but we need your answers to understand how differences in question wording affect health and aging trends.
>
> PRESS 1 AND ENTER TO CONTINUE

## LS1

| | |
|---|---|
| ls5evdayact1 | R5 LS1 EATING W OUT HELP SP EQUP |
| ls5evdayact2 | R5 LS1 GET IN OUT BED W OUT HELP |
| ls5evdayact3 | R5 LS1 GET IN OUT CHR W OUT HELP |
| ls5evdayact4 | R5 LS1 WALK INSIDE WITHOUT HELP |
| ls5evdayact5 | R5 LS1 GO OUTSDE W OUT HLP SP EQ |
| ls5evdayact6 | R5 LS1 DRESSING WITHOUT HELP |
| ls5evdayact7 | R5 LS1 BATHING WITHOUT HELP |
| ls5evdayact8 | R5 LS1 TOILETING WITHOUT HELP |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for LS1a-LS1h

If at LS1a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

> {[}{The next few questions are about {your/SP's} ability to do everyday activities without help. By help, I mean either the help of another person, including the people who live with {you/him/her}, or the help of special equipment. {]}
>
> {[}{Do you/Does SP} have any problem...{]}
>
> {variable text a-h}
>
> RESPONSE [1] a. eating without the help of another person or special equipment?
> RESPONSE [2] b. getting in or out of bed without help?
> RESPONSE [3] c. getting in or out of chairs without help?
> RESPONSE [4] d. walking around inside without help?
> RESPONSE [5] e. going outside without the help of another person or special equipment?
> RESPONSE [6] f. dressing without help?
> RESPONSE [7] g. bathing without help?
> RESPONSE [8] h. getting to the bathroom or using the toilet?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| 3 | CAN'T DO/DON'T DO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-h sequence until all rows have been displayed.

| LS2 | ls5ableto1 | R5 LS2 PREPARE MEALS W OUT HELP |
|---|---|---|
| | ls5ableto2 | R5 LS2 LAUNDRY WITHOUT HELP |
| | ls5ableto3 | R5 LS2 SP ABLE LIGHT HOUSEWORK |
| | ls5ableto4 | R5 LS2 SHOP FOR GROC WOUT HELP |
| | ls5ableto5 | R5 LS2 SP ABLE MANAGE MONEY |
| | ls5ableto6 | R5 LS2 SP TAKE MEDS WOUT HELP |
| | ls5ableto7 | R5 LS2 SP MAKE TELEPHONE CALLS |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for LS2a-LS2g.

If at LS2a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}{Are you/Is SP} able to...{]}

IF SP DOES NOT DO, BUT IS ABLE TO DO AN ACTIVITY, CODE "YES" FOR THE ACTIVITY

{variable text a-g}

RESPONSE[1] a. prepare meals without help?
RESPONSE[2] b. do laundry without help?
RESPONSE[3] c. do light housework such as washing dishes?
RESPONSE[4] d. shop for groceries without help?
RESPONSE[5] e. manage money, such as keeping track of bills and handling cash?
RESPONSE[6] f. take medicine without help?
RESPONSE[7] g. make telephone calls without help?

**CODES**

| 1 | YES |
|---|---|
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-g sequence until all rows have been displayed.

| BOX LS3 | BOXLS3 | NOT ON FILE |
|---|---|---|

If LS2a=2 (NO), display LS3a.
If LS2b=2 (NO), display LS3b.
If LS2c=2 (NO), display LS3c.
If LS2d=2 (NO), display LS3d.
If LS2e=2 (NO), display LS3e.
If LS2f=2 (NO), display LS3f.

If LS2g=2 (NO), display LS3g.
Otherwise, go to Section CL – Closing.

| **LS3** | **ls5diskefrm1** | R5 LS3 DIS KEEPS FROM MEAL PREP |
|---|---|---|
| | **ls5diskefrm2** | R5 LS3 DIS KEEPS FROM LAUNDRY |
| | **ls5diskefrm3** | R5 LS3 DIS KEEPS FRM LGHT HOUSWK |
| | **ls5diskefrm4** | R5 LS3 DIS KEEPS FRM SHOP GROC |
| | **ls5diskefrm5** | R5 LS3 DIS KEEPS FRM MANAGE MONY |
| | **ls5diskefrm6** | R5 LS3 DIS KEEPS FROM TAKE MEDS |
| | **ls5diskefrm7** | R5 LS3 DIS KEEPS FROM TELEPHONE |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display for LS3a-LS3g

If at LS3a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}Does a disability or a health problem keep {you/SP} from…{]}

{variable text a-g}

RESPONSE [1] a. preparing meals?
RESPONSE [2] b. doing laundry?
RESPONSE [3] c. doing light housework?
RESPONSE [4] d. shopping for groceries?
RESPONSE [5] e. managing money?
RESPONSE [6] f. taking medicine?
RESPONSE [7] g. making telephone calls?

**CODES**

| 1 | YES |
|---|---|
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-g sequence until all rows have been displayed.

Go to Section CL – Closing.

---

## IR1A1            **ir5intlang**            R5 IR1A1 INTERVIEW LANGUAGE

**QUESTION TEXT:**

What language did you use to conduct this interview?

**CODES**

| | | |
|---|---|---|
| 1 | English | IR1 |
| 2 | Spanish | IR1 |
| 3 | Other (specify) | |

---

## IR1A2            **IR1A2**            NOT ON FILE

**QUESTION TEXT:**

Specify language used to conduct interview.

**ENTER TEXT**

Length                          25

---

## IR1            **IR1**            NOT ON FILE

**QUESTION TEXT:**

Was the SP interview completed in person or by telephone?

**ENTER TEXT**

Length                          500

---

## BOXIR1A            **BOXIR1a**            NOT ON FILE

**QUESTION TEXT:**

If DECEASED flag = 1 (YES), go to IR2.
Otherwise, go to IR1A.

---

## IR1A            **IR1A**            NOT ON FILE

**QUESTION TEXT:**

Describe why the SP interview was conducted by telephone.

**CODES**

| | | |
|---|---|---|
| 1 | In person | IR2 |
| 2 | Telephone | |

---

## IR2            **ir5spattitud**            R5 IR2 SP ATTITUDE TOWARD INTVW

**QUESTION TEXT:**

In general, what was the respondent's attitude toward the interview?

**CODES**

| | |
|---|---|
| 1 | Friendly and interested |
| 2 | Cooperative but not particularly interested |
| 3 | Impatient and restless |
| 4 | Hostile |

---

## IR3        ir5undrstand        R5 IR3 SP UNDERSTAND QUESTION

**QUESTION TEXT:**

In general, how was the respondent's understanding of the questions?

**CODES**

| | | |
|---|---|---|
| 1 | Good | Box IR4 |
| 2 | Fair | |
| E | Poor | |

---

## IR3A        IR3A        NOT ON FILE

**QUESTION TEXT:**

Select any issues that may have affected respondent's understanding of the questions

Select all that apply.

**CODES**        **Code All That Apply**

| | | |
|---|---|---|
| 1 | Hearing problems | BOX IR4 |
| 2 | Language barrier | BOX IR4 |
| 3 | SP has Alzheimer's/Dementia | BOX IR4 |
| 91 | Other (Specify) | |

---

## IR3B        IR3B        NOT ON FILE

**QUESTION TEXT:**

Describe any circumstances that may have affected respondent's understanding of the questions.

**ENTER TEXT**

Length        500

---

## BOX IR4        BOX IR4        NOT ON FILE

If DECEASED flag = 1 (YES), go to IR23.
Else if PROXY flag = 1 (yes), go to IR4.

Otherwise go to IR6

---

## IR4        ir5sppresent        R5 IR4 AMT OF INTERVIW SP PRESENT

**QUESTION TEXT:**

About how much of the interview was the SP present for?

## CODES

| | | |
|---|---|---|
| 1 | All of the time | IR6 |
| 2 | Most of the time | IR6 |
| 3 | Some of the time | IR6 |
| 4 | Only for the cognition and/or performance parts | IR6 |
| 5 | None of the time | |

---

## IR5

| | | |
|---|---|---|
| | **ir5sppresreas1** | R5 IR5 REASON SP NOT PRESENT_SLEEP |
| | **ir5sppresreas2** | R5 IR5 REASON SP NOT PRESENT_2ILL |
| | **ir5sppresreas3** | R5 IR5 REASON SP NOT PRESENT_ALZH |
| | **ir5sppresreas4** | R5 IR5 REASON SP NOT PRESENT_PRXYREQ |
| | **ir5sppresreas5** | R5 IR5 REASON SP NOT PRESENT_INFCLTY |
| | **ir5sppresreas6** | R5 IR5 REASON SP NOT PRESENT_OTHSPFY |

**QUESTION TEXT:**

Select reason(s) why the SP wasn't present for the interview?

## CODES

**Code All That Apply**

| | | |
|---|---|---|
| 1 | SP was sleeping | IR6 |
| 2 | SP was to ill | IR6 |
| 3 | SP has Alzheimer's/Dementia | IR6 |
| 4 | Proxy request | IR6 |
| 5 | SP in facility | IR6 |
| 91 | Other (Specify) | |

---

## IR5A

| | | |
|---|---|---|
| **IR5A** | | NOT ON FILE |

**QUESTION TEXT:**

Explain why the SP wasn't present for the interview.

**ENTER TEXT**

| | |
|---|---|
| Length | 500 |

---

## IR6

| | | |
|---|---|---|
| | **ir5intvwhlp** | R5 IR6 ANYONE HELP WITH INTVW |

**DISPLAY INSTRUCTIONS:**

If PROXY flag = 1 (yes), display "and the proxy".

**QUESTION TEXT:**

Besides the SP {and the proxy}, was there anyone else who helped answer questions during the interview?

## CODES

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | BOX IR7 |
| 3 | Interview was conducted by telephone | BOX IR7 |

**IR6A**

| | |
|---|---|
| ir5prsnhlp1 | R5 IR6A SPOUSE HELPED WITH INTVW |
| ir5prsnhlp2 | R5 IR6A CHILD HELPED WITH INTVW |
| ir5prsnhlp3 | R5 IR6A RELATIVE HELP WITH INTVW |
| ir5prsnhlp4 | R5 IR6A FRIEND HELPED WITH INTVW |
| ir5prsnhlp5 | R5 IR6A STAFF HELPED WITH INTVW |
| ir5prsnhlp6 | R5 IR6A AIDE HELPED WITH INTVW |
| ir5prsnhlp91 | R5 IR6A OTHER HELPED WITH INTVW |

**QUESTION TEXT:**

Select any issues that may have affected respondent's understanding of the questions

Select all that apply.

**CODES**      **Code All That Apply**
1          Spouse/Partner
2          Child of SP
3          Other relative
4          Friend/Neighbor
5          Staff person from place Sp lives
6          Personal helper/aide
91         Other

---

**BOX IR7**              BOX IR7              NOT ON FILE

If IR4 = 5 (none of the time), go to IR8.

Otherwise, go to IR7.

---

**IR7**              IR7              NOT ON FILE

**QUESTION TEXT:**

Did you encounter any problems of issues with administering the SP cognition section?

**CODES**
1          Yes
2          No                                    IR8
3          Not Administered

---

**IR7A**              IR7A              NOT ON FILE

**QUESTION TEXT:**

Describe the SP cognition section problems, issues, or reasons not administered.

**ENTER TEXT**
       Length                              500

---

**IR8**              IR8              NOT ON FILE

**QUESTION TEXT:**

Did you encounter any problems or issues with CAPI?

**CODES**

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | BOX IR10 |

---

**IR8A**  IR8A  NOT ON FILE

**QUESTION TEXT:**

Describe problem or issues with CAPI.

**ENTER TEXT**

| Length | 500 |
|---|---|

---

**BOX IR10**  BOX IR10  NOT ON FILE

If IR4 = 5 (none of the time), go to IR12.

Otherwise, go to IR10.

---

**IR10**  IR10  NOT ON FILE

**QUESTION TEXT:**

Did you encounter any problems of issues with administering the physical activities?

**CODES**

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | IR10B |
| 3 | Not Administered | |

---

**IR10A**  IR10A  NOT ON FILE

**QUESTION TEXT:**

Describe the physical activities problems, issues, or reasons not administered.

**ENTER TEXT**

| Length | 500 |
|---|---|

---

**IR10B**  ir5demolang1  R5 PHYS ACT DEMO SAFETY TRANS

**QUESTION TEXT:**

Was the physical activities demonstration or the safety question "Do you think it would be safe to try this?"
Translate for the SP into a language other than English or Spanish?

**CODES**

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | IR11 |

---

**IR10C**  ir5demolang2 (Sensitive)  R5 PHYS ACT DEMO SAFETY LANG

**QUESTION TEXT:**

What language was the physical activity demonstration or the safety question "Do you think it would be safe to try this?" translated into?

**CODES**

| | |
|---|---|
| 1 | Arabic |
| 2 | Armenian |
| 3 | Bengali |
| 4 | Chinese - Cantonese |
| 5 | Chinese - Mandarin |
| 6 | Creole |
| 7 | Czech |
| 8 | Farsi |
| 9 | French |
| 10 | German |
| 11 | Greek |
| 12 | Guajarati |
| 13 | Hindi |
| 14 | Hungarian |
| 15 | Italian |
| 16 | Japanese |
| 17 | Korean |
| 18 | Laotian |
| 19 | Lithuanian |
| 2- | Panjabi |
| 21 | Polish |
| 22 | Portuguese |
| 23 | Russian |
| 24 | Slovak |
| 25 | Tagalog |
| 26 | Thai |
| 27 | Urdu |
| 28 | Vietnamese |
| 91 | Other (Specify) |

**PROGRAMMER INSTRUCTIONS:**
If IR10C=1-28, go to IR11.
Otherwise, go to IR10D.

---

| **IR10D** | IR10D | NOT ON FILE |
|---|---|---|

**QUESTION TEXT:**
Enter the other language that the physical activities were translated into.

**ENTER TEXT**

| Length | 25 |
|---|---|

---

| **IR12** | ir5sessions | R5 IR12 MORE ONE INTVW SESSION |
|---|---|---|

**QUESTION TEXT:**
Did you have to complete the SP interview in more than one session?

**CODES**

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | IR12C |

---

| **IR12A** | ir5sessrsn1 | R5 IR12A MORE 1 SESSION SP TIRED |
|---|---|---|

|   |   |   |
|---|---|---|
| | **ir5sessrsn2** | R5 IR12A MORE 1 SESSION SP ILL |
| | **ir5sessrsn3** | R5 IR12A MORE 1 SESSION  SCHEDULE |
| | **ir5sessrsn91** | R5 IR12A MORE 1 SESSION  OTHER |

**QUESTION TEXT:**

Select reason(s) for completing interview in more than 1 session.

Select all that apply

**CODES**       **Code All That Apply**
1         SP/Proxy too tired to complete in 1 session
2         SP/Proxy felt poorly/ill/SP's health
3         Schedule conflict for respondent
91        Other  (Specify)

**PROGRAMMER INSTRUCTIONS:**

If 91 selected by itself or with any other response, go to IR12B.
Otherwise, go to IR12C.

---

## IR12B            IR12B                NOT ON FILE

**QUESTION TEXT:**

Describe other reason why the interview was completed in more than 1 session.

**ENTER TEXT**

Length                                            500

---

## IR12C            ir5conhomapt            R5 IR12C INTRV CONDTD AT HME/APT

**QUESTION TEXT:**

Was the entire interview conducted inside SP's home/apartment/unit?

**CODES**
1         Yes                                    IR12E
2         No
3         Entire interview conducted by telephone      IR12E

---

## IR12D            IR12D                NOT ON FILE

**QUESTION TEXT:**

Describe where the interview was completed and why it was not administered in SP's home/apartment/unit.

**ENTER TEXT**

Length                                            500

---

## IR12E            ir5insidhome            R5 IR12E GO INSIDE HOME/APT/UNIT

**QUESTION TEXT:**

Did you go inside SP's home/apartment/unit?

**CODES**
1         Yes

| 2 | No | IR15 |
|---|---|---|

---

**BOX IR13**          BOX IR13                    NOT ON FILE

If IR12C = 1 (ENTIRE INTERVIEW IN HOME) or IR12E = 1 (WENT INSIDE HOME), go to IR13.

Otherwise, go to IR15.

---

**IR13**          ir5condihom1          R5 IR13 PAINT PEELING IN SP HOME

                  ir5condihom2          R5 IR13 PESTS IN SP HOME

                  ir5condihom3          R5 IR13 BROKN FURNITURE SP HOME

                  ir5condihom4          R5 IR13 FLOORING NEEDS REPAIR

                  ir5condihom5          R5 IR13 HOM OTHR TRIPPING HAZRD

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.
If at IR13a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[}Inside the SP's home/apartment/unit, did you observe…{]}

{variable text [a-e]}

RESPONSE [1] a. peeling or flaking paint?
RESPONSE [2] b. evidence of pests (e.g., cockroaches, rodents, etc.)?
RESPONSE [3] c. broken furniture or lamps?
RESPONSE [4] d. flooring in need of repair (e.g., torn carpet, broken tiles, split wood)?
RESPONSE [5] e. other tripping hazards (e.g., pathways not clear, throw rugs not secured, electrical cords in path)?

**CODES**

| 1 | Yes |
|---|-----|
| 2 | No |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display 'variable text' in the a-e sequence until all rows have been displayed.

---

**IR14**          ir5clutter1          R5 IR14 CLUTTR IN INTERVIEW ROOM

                  ir5clutter2          R5 IR14 CLUTTR IN OTHR SP ROOMS

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.
If at IR14a, do not display question text in brackets.
Otherwise, display question text in brackets.

If at IR14b, display response option 4, "Could not see other rooms".

**QUESTION TEXT:**

{[}How cluttered…{]}

{variable text [a-b]}

RESPONSE [1] a. was the room where the interview was held?
RESPONSE [2] b. were the other rooms in the SP's home/apartment/unit?

**CODES**

| | |
|---|---|
| 1 | Not at all cluttered |
| 2 | Somewhat cluttered |
| 3 | Very cluttered |
| 4 | Could not see other rooms |

**PROGRAMMER INSTRUCTIONS:**
Array the responses and variable text columns in the panel.
Display 'variable text' in the a-b sequence until all rows have been displayed.

---

**IR15**   ir5areacond1   R5 IR15 LITTER GLASS ON SDWLK ST

         ir5areacond2   R5 IR15 GRAFFITI ON BUILDG WALLS

         ir5areacond3   R5 IR15 VACANT HOUSES OR STORES

**DISPLAY INSTRUCTIONS:**
Use "Same Question Stem" display.
If at IR15a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

REFER TO THE HOME ENVIRONMENT CHECKLIST EC2a-c ITEMS WHEN ANSWERING THESE QUESTIONS.

{[} When standing in front of the SP's home/building, and looking around in every direction, how much of the following did you see?{]}

{variable text [a-c]}

RESPONSE [1] a. Litter, broken glass, or trash, on sidewalks and streets?
RESPONSE [2] b. Graffiti on buildings and walls?
RESPONSE [3] c. Vacant or deserted houses or storefronts?

**CODES**

| | |
|---|---|
| 1 | None |
| 2 | A Little |
| 3 | Some |
| 4 | A lot |
| 5 | Could not observe |

**PROGRAMMER INSTRUCTIONS:**
Array the responses and variable text columns in the panel.
Display 'variable text' in the a-c sequence until all rows have been displayed.

---

**IR16**   ir5condhome1   R5 IR16 BROKEN WINDOWS IN HOME

         ir5condhome2   R5 IR16 CRUMBLING FOUNDTN IN HOME

         ir5condhome3   R5 IR16 MISSING BRCKS SIDNG IN HM

         ir5condhome4   R5 IR16 ROOF PROBLEM IN HOME

         ir5condhome5

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.
If at IR16a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

REFER TO THE HOME ENVIRONMENT CHECKLIST EC3a-F ITEMS WHEN ANSWERING THESE QUESTIONS.

{[}Standing in front of the SP's home/building, did it have…{]}

{variable text [a-f]}

RESPONSE [1] a. any broken or boarded up windows?
RESPONSE [2] b. a crumbling foundation or open holes?
RESPONSE [3] c. missing bricks, siding, or other outside materials?
RESPONSE [4] d. roof problems (e.g., missing material, sagging, or a hole in roof)?
RESPONSE [5] e. uneven walking surfaces or broken steps in the area leading to the home/building?
RESPONSE [6] f. continuous sidewalks in both directions?

**CODES**

| | |
|---|---|
| 1 | Yes |
| 2 | No |
| 7 | Could not observe |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.
Display 'variable text' in the a-f sequence until all rows have been displayed.

---

**IR17**        IR17        NOT ON FILE

**QUESTION TEXT:**

Are there any driving directions that you'd like to enter for the next round interviewer

**CODES**

| | | |
|---|---|---|
| 1 | Yes | |
| 2 | No | IR23 |

---

**IR17A**        IR17A        NOT ON FILE

**QUESTION TEXT:**

Provide driving directions for the next round interviewer.

**ENTER TEXT**

| | |
|---|---|
| Length | 500 |

---

**IR23**        IR23        NOT ON FILE

**QUESTION TEXT:**

Is there any information you have recorded in the CAPI SP interview that you would like the Home Office staff to correct?

**CODES**

| | |
|---|---|
| 1 | Yes |
| 2 | No                                                   BOX IR24 |

---

**IR23A**                  IR23A                      NOT ON FILE

**QUESTION TEXT:**

Describe information you have recorded in the CAPI SP interview that you would like the Home Office staff to correct.

**ENTER TEXT**

Length                                750

---

**BOXIR24**              BOXIR24                  NOT ON FILE

**QUESTION TEXT:**

If DECEASED flag = 1 (YES), go to IR25.
Otherwise, got to IR24.

---

**IR24**                    IR24                       NOT ON FILE

**QUESTION TEXT:**

Are there any other comments about the case or the interviewing situation you would like to make?

**CODES**

| | |
|---|---|
| 1 | Yes |
| 2 | No                                                   IR25 |

---

**IR24A**                  IR24A                      NOT ON FILE

**QUESTION TEXT:**

Describe other comments about the case or interviewing situation.

**ENTER TEXT**

Length                                750

---

**IR25**                    IR25                       NOT ON FILE

**QUESTION TEXT:**

Press 1 and Enter to return to IMS

**PROGRAMMER INSTRUCTIONS:**

Return to IMS.
Finalize SP IRQ task as complete (code 20).

## FQ1PRE    FQ1PRE    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
> If the NHATS Interview task =11 (READY) and NEWSAMPLE flag <> 1, display "CONFIRM WITH THE FACILITY {SP} IS ALIVE BEFORE CONTINUING" and "AND {SP} IS ALIVE"

**QUESTION TEXT:**
> YOU HAVE SELECTED THE FACILITY STAFF QUESTIONNAIRE (FQ) FOR CASE
>
> {CASE ID}, {SP}
>
> {CONFIRM WITH THE FACILITY { SP} IS ALIVE BEFORE CONTINUING}.
>
> IF THIS IS THE CORRECT CASE {AND {SP} IS ALIVE}, PRESS 1 AND ENTER TO CONTINUE
>
> TO SELECT ANOTHER CASE OR TASK, BREAKOFF AND SELECT THE CORRECT CASE ID AND TASK FROM THE IMS

## FQ1Consent    FQ1Consent    NOT ON FILE

**QUESTION TEXT:**
> During the course of the study, we would like to record some of the questions and answers for training and data quality. I'd like to continue now unless you have any questions.
>
> PRESS 1 AND ENTER TO CONTINUE
>
> IF RESPONDENT REFUSES TO ALLOW AUDIO RECORDING, PRESS 7 AND ENTER

**CODES**

| | | |
|---|---|---|
| 1 | CONSENT TO RECORDING | FQ1A |
| 7 | REFUSE CONSENT TO RECORD | |
| 5 | | |

## FQ1NotRec    FQ1NotRec    NOT ON FILE

> That's fine. The interview will not be recorded.
>
> PRESS 1 AND ENTER TO CONTINUE

## FQ1A    FQ1A    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
> Display "FIRST" in bold underlined text.
> Display FQ1a and FQ1b on the same screen.

**QUESTION TEXT:**
> First, I would like to confirm your name and contact information.

What is your name?

ENTER FIRST NAME.  CONFIRM SPELLING.

**ENTER TEXT**

Length                                                    25

---

**FQ1B**                    **FQ1B**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display "LAST" in bold underlined text.
Display FQ1a and FQ1b on the same screen.

**QUESTION TEXT:**
ENTER LAST NAME.  CONFIRM SPELLING.

**ENTER TEXT**

Length                                                    25

---

**FQ2**                     **FQ2**                      NOT ON FILE

**QUESTION TEXT:**
What is your job title?

**ENTER TEXT**

Length                                                    50

---

**FQ3A**                    **FQ3A**                     NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "address" as underlined text.

**QUESTION TEXT:**
What is the mailing address here?

CONFIRM SPELLING

**ENTER TEXT**

Length                                                    25

**PROGRAMMERS INSTRUCTIONS:**
If Breakoff at or before this screen, do not save any FQ data and set FQ task status = 11 (READY).

---

**FQ3B**                    **FQ3B**                     NOT ON FILE

**DISPLAY INSTRUCTIONS:**
Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "address" as underlined text.

**QUESTION TEXT:**
[What is the mailing address here?]

**ENTER TEXT**

Length                                                                          25

**PROGRAMMERS INSTRUCTIONS:**
Allow empty

---

# FQ3C                          **FQ3C**                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "city" as underlined text.

**QUESTION TEXT:**

[What is the city?]

CONFIRM SPELLING

**ENTER TEXT**

Length                                                                          25

---

# FQ3D                          **FQ3D**                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "state" as underlined text.

**QUESTION TEXT:**

[What is the state?]

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND PRESS
ENTER TO SELECT

**PROGRAMMERS INSTRUCTIONS:**
Use lookup file (51STATE) of state names.

---

# FQ3E                          **FQ3E**                          NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "zip code" as underlined text.

**QUESTION TEXT:**

[What is the zip code?]

ENTER A 5-DIGIT ZIP CODE

**ENTER TEXT**

Length                                                                          5

**PROGRAMMERS INSTRUCTIONS:**
5-digit entry required.  If less than 5 digits entered, display Error Message #11.

---

**FQ3F**                    **FQ3F**                    NOT ON FILE

**QUESTION TEXT:**

What is the phone number here?

ENTER AREA CODE AND PHONE NUMBER

**ENTER TEXT**

Length                                                    10
REFUSED

**PROGRAMMERS INSTRUCTIONS:**

Hard edit: if the answer from FQ3f contains less than 10 digits, display error message #12.

Use number input mask (xxx-xxx-xxxx) in the response field.

---

**FQ4**                    **FQ4**                    NOT ON FILE

**QUESTION TEXT:**

What is your email address here?

ENTER 97 IF NOT EMAIL ADDRESS

**ENTER TEXT**

Length                                                    50
REFUSED

---

**FQ5**                    **FQ5**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display "whole" as bold underlined text.

**QUESTION TEXT:**

What is the name of this place?  If there are different names for certain parts of levels of care in this place, please tell me the name for the whole place.

**ENTER TEXT**

Length                                                    75

---

**FQ6**                    **fq5dfacdescr**              R5 FQ6 FACILITY TYPE

**DISPLAY INSTRUCTIONS:**

Display text from FQ5 as FACILITY NAME.
Display "whole" as underlined text.

**QUESTION TEXT:**

SHOW CARD FQ1

Now I'm going to show you a list of places.

Which of these BEST describes {FACILITY NAME FROM FQ5}?  Again, if there are different parts or levels of care in this place, please tell me about the whole place.

PRESS F1 FOR HELP SCREEN

**CODES**

1              FREE STANDING NURSING HOME                    FQ15

| 2 | FREE STANDING ASSISTED LIVING FACILITY | FQ7 |
|---|---|---|
| 3 | NURSING HOME AND ASSISTED LIVING FACILITY | FQ7 |
| 4 | CONTINUING CARE RETIREMENT COMMUNITY (CCRC) | FQ7 |
| 5 | ADULT FAMILY CARE HOME | FQ15 |
| 6 | GROUP HOME | FQ15 |
| 7 | BOARD AND CARE HOME | FQ15 |
| 8 | RETIREMENT COMMUNITY OR SENIOR HOUSING (NOT CCRC) | FQ7 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | FQ7 |
| | DON'T KNOW | FQ7 |

---

## FQ6A      fq5dosfacd      R5 FQ6A OTHER SPECIFY FAC TYPE

**QUESTION TEXT:**

SPECIFY TYPE OF PLACE

**ENTER TEXT**

Length                                          50

---

## FQ7      FQ7      NOT ON FILE

**QUESTION TEXT:**

Next, I need to confirm where {SP} is living.

PRESS 1 AND ENTER TO CONTINUE

---

## FQ8      fq5prtlivnam      R5 FQ8 FAC NM DIFF4PLC SP LIVES

**QUESTION TEXT:**

Does the part of {PLACE NAME FROM FQ5} in which {SP} lives have a different name?

**CODES**

| 1 | YES | |
|---|---|---|
| 2 | NO | FQ10 |
| | REFUSED | FQ10 |
| | DON'T KNOW | FQ10 |

---

## FQ9      FQ9      NOT ON FILE

**QUESTION TEXT:**

What is the name of {SP}'s area?

**ENTER TEXT**

Length                                          50

---

## FQ10      fq5dfacarea      R5 FQ10 FACILITY AREA SP LIVES

**QUESTION TEXT:**

Is the place where {SP} lives considered independent living, assisted living, a special care unit, a nursing home care unit, or something else?

| | | |
|---|---|---|
| 1 | INDEPENDENT LIVING | FQ12 |
| 2 | ASSISTED LIVING | FQ12 |
| 3 | SPECIAL CARE, MEMORY CARE, OR ALZHEIMER'S UNIT | FQ11 |
| 4 | NURSING HOME | FQ12 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | FQ12 |
| | DON'T KNOW | FQ12 |

## FQ10A       fq5dosfaca       R5 D FQ10A OTHER SPECIFY FAC AREA

**QUESTION TEXT:**

SPECIFY OTHER TYPE OF PLACE

**ENTER TEXT**

Length       50

**PROGRAMMERS INSTRUCTIONS:**

Go to FQ12

## FQ11       fq5assdnrsng       R5 FQ11 ASSIST LIV OR NURSG HOME

**QUESTION TEXT:**

Is this special care unit part of an assisted living facility or is it part of a nursing home?

**CODES**

| | |
|---|---|
| 1 | ASSISTED LIVING |
| 2 | NURSING HOME |
| | REFUSED |
| | DON'T KNOW |

## FQ12       fq5othrlevls       R5 FQ12 OTH LEVELS OF CARE AVAIL

**QUESTION TEXT:**

Besides where {SP} lives, are there other levels of care available at {PLACE NAME FREOM FQ5} such as independent living, assisted living, a special care unit, or a nursing home care unit?

**CODES**

| | | |
|---|---|---|
| 1 | YES | FQ13 |
| 2 | NO | FQ15 |
| | REFUSED | FQ15 |
| | DON'T KNOW | FQ15 |

## FQ13

| | |
|---|---|
| fq5whotlevl1 | R5 FQ13 INDEPNDNT LIV CARE AVAIL |
| fq5whotlevl2 | R5 FQ13 ASSISSTED LVNG CARE AVAIL |
| fq5whotlevl3 | R5 FQ13 ALZHEIMER CARE AVAIL |
| fq5whotlevl4 | R5 FQ13 NURSING HOME CARE AVAIL |
| fq5whotlevl5 | R5 FQ13 OTHR SPECIFY CARE AVAIL |

**QUESTION TEXT:**

What other levels of care are available?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | INDEPENDENT LIVING | FQ15 |
| 2 | ASSISTED LIVING | FQ15 |
| 3 | SPECIAL CARE, MEMORY CARE, OR ALZHEIMER'S UNIT | FQ15 |
| 4 | NURSING HOME | FQ15 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | FQ15 |
| | DON'T KNOW | FQ15 |

---

**FQ13A**          FQ13A          NOT ON FILE

**QUESTION TEXT:**

SPECIFY OTHER LEVELS OF CARE

**ENTER TEXT**

Length                                        50

---

**FQ15**

| | | |
|---|---|---|
| **fq5servaval1** | R5 FQ15 MEALS AVAIL |
| **fq5servaval2** | R5 FQ15 HELP WITH MEDS AVAIL |
| **fq5servaval3** | R5 FQ15 HELP W BATH DRESS AVAIL |
| **fq5servaval4** | R5 FQ15 LAUNDRY SERVCS AVAIL |
| **fq5servaval5** | R5 FQ15 HOUSEKEEPING SERV AVAIL |
| **fq5servaval6** | R5 FQ15 TRANSPRT MED CARE AVAIL |
| **fq5servaval7** | R5 FQ15 TRANSPRT TO STORE EVENT |
| **fq5servaval10** | R5 FQ15 FITNESS CENTER AVAIL |
| **fq5servaval11** | R5 FQ15 WALKING AREA AVAIL |
| **fq5servaval8** | R5 FQ15 RECREATIONAL FAC AVAIL |
| **fq5servaval9** | R5 FQ15 SOCIAL EVENTS AVAIL |
| **fq5servaval12** | R5 FQ15 ONSITE HEALTH AVAIL |
| **fq5servaval13** | R5 FQ15 MED EMERGENCY SYSTEM AVAIL |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at FQ15a, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "at {SP}'s current level of care" and "offered" as bold underlined text.

**QUESTION TEXT:**

SHOW CARD FQ2

{[}We are interested in the services that are available to people at {SP}'s current level of care.
Please look at this list. {]}

{[}For each service, please tell me if the service is offered to people at {SP}'s level of care. If the service is offered, please also indicate whether it is part of {SP}'s package of services provided by {PLACE NAME from FQ5} or if there is an extra charge for it. {]}

{variable text [a-m]}

RESPONSE [1] a. Meals (in common dining areas or in resident's own rooms)?
RESPONSE [2] b. Help with medications?
RESPONSE [3] c. Help with bathing and dressing?
RESPONSE [4] d. Laundry services for linens or clothing?
RESPONSE [5] e. Housekeeping services?
RESPONSE [6] f. A van or shuttle to doctors or other medical care providers?
RESPONSE [7] g. A van or shuttle to stores or events like concerts?
RESPONSE [8] h. An indoor fitness center?
RESPONSE [9] i. Areas to walk for pleasure or exercise, like an outdoor walking path?
RESPONSE [10]. j. Other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [11] k. Organized social events and activities?
RESPONSE [12] l. Onsite health and wellness programs?
RESPONSE [13] m. A medical emergency system to call someone for help?

**CODES**

| | |
|---|---|
| 1 | YES, SERVICE PROVIDED AS PART OF PACKAGE |
| 2 | YES, SERVICE PROVIDED AT AN EXYTRA CHARGE |
| 3 | NO, SERVICE NOIT PROVIDED |
| | REFUSED |
| | DON'T KNOW |

**PROGRAMMER INSTRUCTIONS:**

Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-m sequence until all rows have been displayed.

---

**FQ16PRE**          FQ16PRE                    NOT ON FILE

**QUESTION TEXT:**

These next questions are about the sources of payment for {SP}'s care.
PRESS 1 AND ENTER TO CONTINUE

---

**FQ16**

| | | |
|---|---|---|
| | **fq5paysourc1** | R5 FQ16 SP OR SP FAMILY PAYMENT |
| | **fq5paysourc2** | R5 FQ16 SOC SEC SSI PAYMENT |
| | **fq5paysourc3** | R5 FQ16 MEDICAID PAYMENT |
| | **fq5paysourc4** | R5 FQ16 MEDICARE PAYMENT |
| | **fq5paysourc5** | R5 FQ16 PRIVATE INSURANCE PAYMNT |
| | **fq5paysourc6** | R5 FQ16 OTHR GOVT PAYMENT |

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display

If at FQ16a, do not display question text in brackets.

Otherwise, display question text in brackets.

If FQ6= 1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME), display FQ16d {Medicare}.

Display dollar amounts using commas to separate zeroes.

**QUESTION TEXT:**

SHOW CARD FQ3

{[}In the last billing month for which you have complete payment information, what did each of these sources pay for {SP}'s care?{]}

{[}For each one, please tell me the total amount paid by each source for this part of {SP}'s care.{]}

ENTER DOLLAR AMOUNT

ENTER ZERO IF NO PAYMENT FROM SOURCE

{variable text [a-f]}

RESPONSE [1] a.  SP OR SP'S FAMILY
RESPONSE [2] b.  SOCIAL SECURITY OR SSI
RESPONSE [3] c.  MEDICAID
RESPONSE [4] d.  MEDICARE
RESPONSE [5] e.  PRIVATE INSURANCE
RESPONSE [6] f.  OTHER GOVERNMENT SOURCE (VA, STATE, COUNTY)

**ENTER NUMBER**

| | |
|---|---|
| Range | |
| Soft Range | 0 to 26000 |
| REFUSED | 0 to 10000 |
| DON'T KNOW | |

**PROGRAMMER INSTRUCTIONS:**
Array the responses and Variable text columns in the panel.
Display 'variable text' in the a-f sequence until all rows have been displayed.

---

| **BOX FQ17** | **BOX FQ17** | NOT ON FILE |
|---|---|---|

If DK or RF entered at FQ16 for any amount category, go to FQ18.

---

| **FQ17** | **fq5totalpaym** | R5 FQ17 TOTAL PAYMENT FOR CARE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**
Display dollar amounts using comas to separate zeroes.

**QUESTION TEXT:**

That adds up to {TOTAL AMOUNT CALCULATED FROM FQ16}

Is that the total monthly payment for {SP}'s care?

**CODES**

| 1 | YES | FQ19 |
|---|---|---|
| 2 | NO | |
| | REFUSED | FQ19 |
| | DON'T KNOW | FQ19 |

---

| **FQ18** | **fq5tmnthlyamt** | R5 FQ18 TOT MTHLY AMT FOR CARE |
|---|---|---|

**DISPLAY INSTRUCTIONS:**

Display dollar amounts using comas to separate zeroes.

**QUESTION TEXT:**

Display dollar amounts using commas to separate zeroes.

ENTER AMOUNT

**ENTER NUMBER**

| | |
|---|---|
| Range | 0 to 26000 |
| REFUSED | |
| DON'T KNOW | |

---

# FQ19    fq5primpayer    R5 FQ19 PRIMARY PAYER FOR CARE

**DISPLAY INSTRUCTIONS:**

If FQ6= 1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME), display {Medicare,} and response category 4.

**QUESTION TEXT:**

Would you say the primary payer for {SP}'s care is {SP} or {his/her} family, Social Security, Medicaid, {Medicare,} or some other source?

**CODES**

| | | |
|---|---|---|
| 1 | SP/FAMILY | FQ21 |
| 2 | SOCIAL SECURITY/SSI | FQ21 |
| 3 | MEDICAID | FQ21 |
| 4 | MEDICARE | FQ21 |
| 5 | OTHER SOURCE | |
| | REFUSED | FQ21 |
| | DON'T KNOW | FQ21 |

---

# FQ20    fq5govsource    R5 FQ20 GOVERNMENT SOURCE

**QUESTION TEXT:**

Is that a government source?

**CODES**

| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

# FQ21    FQ21    NOT ON FILE

**QUESTION TEXT:**

I would like to confirm that {SP}'s name is {SP'S MIDDLE NAME} {SP'S LAST NAME}.  Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | FQ22 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

## FQ21A    FQ21A    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

 Display preloaded SP name in the response fields.

 Display "FIRST" in bold underlined text.

 Display SP first name in fill as bold underlined

**QUESTION TEXT:**

> What is the correct spelling of {SP}'s full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT FIRST NAME.  CONFIRM SPELLING.

**ENER TEXT**

    Length         25

**PROGRAMMER INSTRUCTIONS:**
 Display FQ21a, 21b, and 21c on the same screen.

## FQ21B    FQ21B    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

 Display "MIDDLE" in bold underlined text.

 Display SP middle name in fill as bold underlined

**QUESTION TEXT:**

> What is the correct spelling of {SP}'s full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT MIDDLE NAME.  CONFIRM SPELLING.
>
> PRESS ENTER IF NO MIDDLE NAME OR INITIAL

**ENER TEXT**

    Length         25

**PROGRAMMER INSTRUCTIONS:**
 Allow empty.

 Display FQ21a, 21b, and 21c on the same screen.

## FQ21C    FQ21C    NOT ON FILE

**DISPLAY INSTRUCTIONS:**

 Display "LAST" in bold underlined text.

 Display SP last name in fill as bold underlined

**QUESTION TEXT:**

> What is the correct spelling of {SP}'s full name?
>
> {FIRST NAME} {MIDDLE NAME} {LAST NAME}
>
> CORRECT LAST NAME.  CONFIRM SPELLING.

**ENER TEXT**

        Length                                        25

**PROGRAMMER INSTRUCTIONS:**

    Display FQ21a, 21b, and 21c on the same screen.

    Set flag to indicate SP name was updated.

---

## FQ22                **r5dgender**          R5 D GENDER OF SP

**QUESTION TEXT:**

THE SP IS LISTED AS A {MALE/FEMALE}

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK: Is {SP} male or female?

**CODES**

| | |
|---|---|
| 1 | MALE |
| 2 | FEMALE |

---

## BOX FQ22A        **BOX FQ22A**        NOT ON FILE

Compare preloaded CMS gender of SP with FQ22 value just entered.
If they are the same, go to FQ23.
Otherwise, go to FQ22a

---

## FQ22A              **FQ22A**           NOT ON FILE

**QUESTION TEXT:**

YOU JUST CHANGED SP'S GENDER FROM {PRELOADED CMS GENDER MALE/FEMALE} TO {FEMALE/MALE FROM FQ22} DID YOU INTEND TO DO THAT?

**CODES**

| | | |
|---|---|---|
| 1 | YES | |
| 2 | NO | FQ22 |

**PROGRAMMER INSTRUCTIONS:**

    If FQ22A = 2 (NO), display hard error message "SELECT "GO TO" TO RETURN TO IS4A AND RE-ENTER RESPONSE."

---

## FQ23              FQ23              NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded CMS DOB in the question text.

SPELL OUT MONTH WHEN DISPLAYING {BIRTH MONTH BIRTH DAY, BIRTH YEAR}.

FORMAT AS MM/DD/YYYY WHEN DISPLAYING ({BIRTH MM/BIRTH DD/BIRTH YEAR}).

**QUESTION TEXT:**

I also want to confirm {SP}'s birth date is {BIRTH MONTH, BIRTH DAY, BIRTH YEAR} ({BIRTH MM/BIRTHDD/BIRTH YEAR}). Is that correct?

**CODES**

| | | |
|---|---|---|
| 1 | YES | BOX FQ26 |
| 2 | NO | |

|  | REFUSED | BOX FQ26 |
|  | DON'T KNOW | BOX FQ26 |

---

**FQ24**   FQ24   NOT ON FILE

**DISPLAY INSTRUCTIONS:**

Display preloaded CMS DOB.

**QUESTION TEXT:**

What is {SP}'s date of birth?

ENTER MONTH, DAY, AND YEAR (MM-DD-YYYY)

**PROGRAMMER INSTRUCTIONS:**

Use mask to collect DOB.  Separate mm/dd/yyyy with hyphens for data entry.
MONTH range: 1-31
DAY range 1-31
YEAR range: (CURRENT YEAR-65 – FQ24 DOB).

---

**FQ25**   r5d2intvrage   R5 D SP CAT AGE AT INTVW

**DISPLAY INSTRUCTIONS:**

COMPUTE AGE AS (CURRENT DATE – FQ24 DOB).

**QUESTION TEXT:**

I would like to confirm that {SP} is {CALCULATED AGE} years old today. Is that correct?

**CODES**

| 1 | YES |  |
| 2 | NO | FQ24 |
|  | REFUSED |  |
|  | DON'T KNOW |  |

---

**BOX FQ26**   BOX FQ26   NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to FQ26.
Otherwise, go to FQ29.

---

**FQ26**

| fq5yourrace1 (Sensitive) | R5 FQ26 SP RACE OF SP-WHITE |
| fq5yourrace2 (Sensitive) | R5 FQ26 SP RACE OF SP-AFRICN AMERICN |
| fq5yourrace3  (Sensitive) | R5 FQ26 SP RACE OF SP-AMERICAN INDIAN |
| fq5yourrace4 (Sensitive) | R5 FQ26 SP RACE OF SP-ALASKA NATIVE |
| fq5yourrace5 (Sensitive) | R5 FQ26 SP RACE OF SP-ASIAN |
|  | R5 FQ26 SP RACE OF SP-NATIVE HWAIIAN |
| fq5yourrace7 (Sensitive) | R5 FQ26 SP RACE OF SP PACIFIC ISLANDR |

**QUESTION TEXT:**

SHOW CARD FQ4

What race does {SP} consider {himself/herself} to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, or something else?

SELECT ALL THAT APPLY

| CODES | Code All That Apply | |
|---|---|---|
| 1 | WHITE/CAUCASIAN | BOX FQ27 |
| 2 | BLACK/AFRICAN AMERICAN | BOX FQ27 |
| 3 | AMERICAN INDIAN | BOX FQ27 |
| 4 | ALASK NATIVE | BOX FQ27 |
| 5 | ASIAN | BOX FQ27 |
| 6 | NATIVE HAWAIIAN | BOX FQ27 |
| 7 | PACIFIC ISLANDER | BOX FQ27 |
| 91 | OTHER (SPECIFY) | |
| | REFUSED | BOX FQ27 |
| | DON'T KNOW | BOX FQ27 |

**PROGRAMMER INSTRUCTIONS:**
Allow select all that apply.

---

**FQ26A**　　　　　　　FQ26A　　　　　　　NOT ON FILE

**QUESTION TEXT:**
SPECIFY OTHER RACE

**ENTER TEXT**
　　　　　　Length　　　　　　　　　　　　　　　　75

---

**BOX FQ27**　　　　BOX FQ27　　　　　　NOT ON FILE

If more than one response category selected at FQ26, go to FQ27.

Otherwise, go to FQ28

---

**FQ27**　　　　　　**fq5primarace (Sensitive)**　　R2 FQ27 RACE CONSID SP PRIMRLY

**DISPLAY INSTRUCTIONS:**
Display "or" between each race in question text.

In question text, display only response categories selected at FQ26.

**QUESTION TEXT:**
SHOW CARD FQ4

Does SP consider {himself/herself} primarily {RESPONSE CATEGORIES SELECTED AT FQ26}?

**CODES**

| | |
|---|---|
| 1 | WHITE/CAUCASIAN |
| 2 | BLACK/AFRICAN AMERICAN |
| 3 | AMERICAN INDIAN |
| 4 | ALASK NATIVE |
| 5 | ASIAN |
| 6 | NATIVE HAWAIIAN |
| 7 | PACIFIC ISLANDER |
| 91 | OTHER RACE SPECIFIED AT FQ26A |
| | REFUSED |

DON'T KNOW

---

**FQ28**                    **fq5hisplatno (Sensitive)**          R5 FQ28 CNSDR SP HSPAN OR LATNO

**QUESTION TEXT:**
Does {SP} consider {himself/herself} Hispanic or Latino?

**CODES**
| | |
|---|---|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

---

**FQ29**                    **FQ29**                    NOT ON FILE

**QUESTION TEXT:**
YOU HAVE COMPLETED THE FACILITY STAFF QUESTIONNAIRE.  THANK RESPONDENT.

PRESS 1 AND ENTER TO CONTINUE

---

**FQ30**                    **FQ30**                    NOT ON FILE

**DISPLAY INSTRUCTIONS:**
If (LAST INT disposition code =61 (Final NH Complete) or LAST INT disposition code =64 (Final FQ complete, SP INT NOT COMPLETE)) and CMS DODFLAG <> 1 (SP ALIVE), display "NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE."

**QUESTION TEXT:**
{NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE.}

PRESS 1 AND ENTER TO RETURN TO IMS SCREEN

**PROGRAMMER INSTRUCTIONS:**
If FQ8=1 (YES), FACILITY NAME = text from FQ9.
Else FACILITY NAME = text from FQ5.
IMS will pull FACILITY NAME from NHATS Facility Task once task status = 20 (COMPLETE).

If FQ6 = 1 or [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) and FQ10 = 4] or FQ11 = 2, set FACILITY TYPE flag = 1 (NURSING HOME).

Otherwise, set FACILITY TYPE flag = 2 (OTHER FACILITY).

If NEWSAMPLE flag=1 (YES) and FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".
Else if LAST INT final disposition code was code 61 (FINAL NH COMPLETE) and if FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".

Else if R1 final disposition code was code 64 (FINAL FQ COMPLETE, SP NOT COMPLETE), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED); set the final case status to code 61, "Complete, NH Facility" if the FACILITY TYPE flag = 1 (NURSING HOME); set the final case status to code 64 (FINAL FQ, SP INTERVIEW NOT COMPLETED) if the FACILITY TYPE flag=2 (OTHER FACILITY).

If FACILITY TYPE flag = 1 or 2, set FACILITY flag = 1 (YES).

IMS will pull FACILITY TYPE flag and FACILITY flag from NHATS Facility Task once task status = 20 (COMPLETE) if the NHATS Interview Task=11 (READY).

Set IRQ Facility Task=code 11 (READY).

---

| Derived Variables From Items in FQ Section | |
| --- | --- |
| fq5dlocsp | R5 D FQ6 6A 10 10A FOR SAMP WGT |
| r5dgender | R5 D GENDER OF SP |
| r5d2intvrage | R5 D SP CAT AGE AT INTVW |