First we have a few questions about ways you may have helped {SP} in the last month, that is since {CURRENT DATE MINUS 1 MONTH}, because of {his/her} health and functioning.

Let's start with chores you may do around {SP}'s home. This includes laundry, cleaning, or making hot meals.

In the last month, how often did you help {SP} with laundry, cleaning, or making hot meals or do these chores? Would you say every day, most days, some days, rarely, or never?

CODES

1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON'T KNOW

If a breakoff occurs at any time after a response is coded for CA1, the disposition for the case should be ST (Started).
CA3  
cca1hlpordmd  
C1 CA3 EVER HELP ORDER MEDICINES  

QUESTION TEXT:  
In the last month, did you ever help (SP) order [his/her] prescribed medicines or order these for him/her?  

CODES  
1  YES  
2  NO  
7  SP DOES NOT TAKE ANY PRESCRIBED MEDICINES  
DON'T KNOW  

CA4  
cca1hlpbnkng  
C1 CA4 HELP WTH BILLS OR BANKING  

QUESTION TEXT:  
In the last month, did you ever help (SP) with handling bills or banking or do this for [him/her]?  

CODES  
1  YES  
2  NO  
3  REFUSED  
DON'T KNOW  

BOX CA5  
BOX CA5  
NOT ON FILE  

If CA2= 1, 2, 3, 4 (HELPS SHOP) or CA3=1 (YES, ORDER MEDS) or CA4=1 (YES, HANDLE BILLS), go to CA5.  
Otherwise, go to CA6.  

CA5  
cca1cmpgrcry  
C1 CA5A USE COMPUTR SHOP FR GROC  
cca1cmpordrx  
C1 CA5B USE COMPUTR ORDER MEDS  
cca1cmpbnkng  
C1 CA5C USE COMPUTR BILLS BANKNG  

DISPLAY INSTRUCTIONS:  
If CA2 = 1, 2, 3, or 4 (HELPS SHOP), display CA5a.  
If CA3 = 1 (YES, ORDER MEDS), display CA5b.  
If CA4 = 1 (YES, HANDLE BILLS), display CA5c.  
Use "Same Question Stem" display.  
If at first item, do not display question text in brackets.  
Otherwise, display question text in brackets.  

QUESTION TEXT:  
{} In the last month, did you use a computer to...{}  
{} variable text [a-c]  
{} RESPONSE [1] a. shop for groceries or personal items for [SP]?
{} RESPONSE [2] b. order medicines for [him/her]?
{} RESPONSE [3] c. handle bills or do banking for [him/her]?

CODES  
1  YES  
2  NO  
3  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.

**CA6PRE**

Next, I have a few questions about hands-on assistance that you may have given [SP] in the last month.

PRESS 1 AND ENTER TO CONTINUE

**CA6**

**QUESTION TEXT:**

In the last month, how often did you help [SP] with personal care such as eating, showering or bathing, dressing or grooming, or using the toilet? Would you say every day, most days, some days, rarely, or never?

**CODES**

1. EVERY DAY
2. MOST DAYS
3. SOME DAYS
4. RARELY
5. NEVER
6. REFUSED
7. DON’T KNOW

**CA7**

**QUESTION TEXT:**

In the last month, how often did you help [SP] get around, that is, getting in and out of bed, getting around inside [his/her] home, or leaving [his/her] home to go outside? Would you say every day, most days, some days, rarely, or never?

**CODES**

1. EVERY DAY
2. MOST DAYS
3. SOME DAYS
4. RARELY
5. NEVER
6. REFUSED
7. DON’T KNOW

**BOX CA8**

If CA6 = 5 (NEVER HELPED WITH PERSONAL CARE), RF, or DK and CA7 = 5 (NEVER HELPED GET AROUND HOME), RF, or DK, go to CA9.

Otherwise, go to CA8.
QUESTION TEXT:

{} In the last month, when you helped {} with personal care, did you ever... {} 

RESPONSE [1] a. lift {} from a seated or lying position?  
RESPONSE [2] b. let {} lean on you or support {} weight?  
RESPONSE [3] c. hold {} steady while {} walked or stood?

CODES

1 YES  
2 NO  
3 REFUSED  
4 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.

If CA8a = 1, go to CA8d.  
Else if CA8b = 1, go to CA8e.  
Else if CA8c = 1, go to CA8f.  
Otherwise go to CA9.

CA8d

QUESTION TEXT:

In the last month, how often did you lift {} from a seated or lying position? Would you say every day, most days, some days, or rarely?

CODES

1 EVERY DAY  
2 MOST DAYS  
3 SOME DAYS  
4 RARELY  
5 REFUSED  
6 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If CA8b = 1, go to CA8e.  
Else if CA8c = 1, go to CA8f.  
Otherwise go to CA9.
QUESTION TEXT:
In the last month, how often did you let {him/her} lean on you to support {his/her} weight? [Would you say every day, most days, some days, or rarely?]

CODES
1  EVERY DAY
2  MOST DAYS
3  SOME DAYS
4  RARELY
    REFUSED
    DON’T KNOW

PROGRAMMER INSTRUCTIONS:
If CA8c = 1, go to CA8f.
Otherwise go to CA9.

CA8f  cca1howfstd
C1 CA8F HOW OFT HELD STEADY

QUESTION TEXT:
In the last month, how often did you hold {him/her} steady while {he/she} stood or walked? [Would you say every day, most days, some days, or rarely?]

CODES
1  EVERY DAY
2  MOST DAYS
3  SOME DAYS
4  RARELY
    REFUSED
    DON’T KNOW

CA9  cca1howfdrv
C1 CA9 HOW OFTEN DROVE SP

QUESTION TEXT:
In the last month, how often did you drive {SP} places? Would you say every day, most days, some days, rarely, or never?

CODES
1  EVERY DAY
2  MOST DAYS
3  SOME DAYS
4  RARELY
5  NEVER
    REFUSED
    DON’T KNOW

CA10  cca1howfott
C1 CA10 OFTN WENT ON OTH TRANSPR

QUESTION TEXT:
In the last month, how often did you go with {SP} in a van, shuttle or cab, or take public transportation (the bus, subway, train, or light rail) with {him/her}? [Would you say every day, most days, some days, rarely, or never?]

CODES
1  EVERY DAY
2  MOST DAYS
3  SOME DAYS
4  RARELY
The next few questions are about help related to {SP}'s health care.

PRESS 1 AND ENTER TO CONTINUE

<table>
<thead>
<tr>
<th>CA11</th>
<th>cca1hlpmed</th>
<th>C1 CA11A KEEP TRACK OF MEDS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>cca1hlpshot</td>
<td>C1 CA11B TAKE SHOTS OF INJECTNS</td>
</tr>
<tr>
<td></td>
<td>ca1hlpmdtk</td>
<td>C1 CA11C MANAGE MEDICAL TASKS</td>
</tr>
<tr>
<td></td>
<td>cca1hlpexrcs</td>
<td>C1 CA11D HELP WITH EXERCISES</td>
</tr>
<tr>
<td></td>
<td>cca1hlpdiet</td>
<td>C1 CA11E HELP WITH A SPECIAL DIET</td>
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<tr>
<td></td>
<td>cca1hlptooth</td>
<td>C1 CA11F HELP CARE FOR TEETH</td>
</tr>
<tr>
<td></td>
<td>cca1hlpfeet</td>
<td>C1 CA11G HELP CARE FOR FEET</td>
</tr>
<tr>
<td></td>
<td>cca1hlpskin</td>
<td>C1 CA11H HELP W SKIN CARE WOUNDS</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.
If at CA11a do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{} In the last month, did you ever help {SP}…{} 

{variable text [a-h]}

RESPONSE [1] a. keep track of {his/her} medications?
RESPONSE [2] b. take shots or injections?
RESPONSE [3] c. manage medical tasks like ostomy care, IVs, or testing blood?
RESPONSE [4] d. with exercises {he/she} was supposed to do?
RESPONSE [5] e. with a special diet?
RESPONSE [6] f. care for {his/her} teeth or dentures?
RESPONSE [7] g. care for {his/her} feet, like clipping nails?
RESPONSE [8] h. with skin care related to wounds or sores?

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-h sequence until all rows have been displayed.

DISPLAY INSTRUCTIONS:

Display date as “Month day, year” with month spelled out.
Now please think about the last year, that is, since [CURRENT DATE MINUS 1 YEAR].

PRESS 1 AND ENTER TO CONTINUE

**CA12**

- **cc1althpmdapt**: C1 CA12A HELP MAKE MEDICAL APPTS
- **cc1althpspkdr**: C1 CA12B HLP SPEAK TO MED PROVIDER
- **cc1althpinsrn**: C1 CA12C HELP ADD HEALTH INS PLN
- **cc1althlpothin**: C1 CA12D HELP W/ OTHER HEALTH INS

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.
If at CA12a, do not display question text in brackets.
Otherwise, display question text in brackets.
Display "year" in bold and underlined text.

**QUESTION TEXT:**

{[} In the last year, did you ever...{]}

{variable text [a-d]}

RESPONSE [1] a. make appointments for {SP} with a medical provider?
RESPONSE [2] b. speak to or e-mail {SP}'s medical provider about {his/her} care?
RESPONSE [3] c. help {him/her} change or add a health insurance or prescription drug plan?

IF NEEDED: For example, changed or helped {him/her} change a Medicare supplemental plan or prescription drug plan, or helped {him/her} decide to join or leave a managed care plan.

RESPONSE [4] d. handle any other health insurance matters related to {his/her} medical care?

IF NEEDED: This includes contacting Medicare or another insurer to find out what is covered, comparing plans or providers, finding out about bills, or filing a claim.

**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 CA13**

**BOX CA13**

**NOT ON FILE**

If INHOUSEHOLD flag = 1 (YES, CAREGIVER LIVES WITH SP) for CG, go to BOX CA15.
Otherwise, go to CA13.

**CA13**

- **cc1alhwget2sp**: C1 CA13 MODE OF TRANS TO VIST SP

**QUESTION TEXT:**

When you visit {SP} how do you usually get there?
### CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Mode of Transportation</th>
<th>Code</th>
<th>Mode of Transportation</th>
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</tr>
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<td>2</td>
<td>DRIVE</td>
<td>CA</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SOMEONE DRIVES ME</td>
<td>CA</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>TAXI</td>
<td>CA</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>BUS</td>
<td>CA</td>
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</tr>
<tr>
<td>6</td>
<td>SUBWAY/TRAIN/LIGHT RAIL</td>
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</tr>
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<td>TRAIN</td>
<td>CA</td>
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</tr>
<tr>
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<td>AIRPLANE/FLY</td>
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</tr>
<tr>
<td></td>
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<td>CA</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>CA</td>
<td></td>
</tr>
</tbody>
</table>

### CA13a

**QUESTION TEXT:**

**SPECIFY MODE OF TRANSPORTATION**

**ENTER TEXT**

Length: 75

---

### CA14

**cca1tm2spunt**

**C1 CA14 UNIT TIME GET 2 SP HOME**

**QUESTION TEXT:**

How long does it normally take you to get to [SP]'s home from where you live?

**INDICATE RESPONSE UNIT**

**CODES**

<table>
<thead>
<tr>
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<th>Unit</th>
<th>Code</th>
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</tr>
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<td>HOURS</td>
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<tr>
<td></td>
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</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>BOX</td>
<td>CA15</td>
</tr>
</tbody>
</table>

---

### CA14a

**cca1tm2spmin**

**C1 CA14A MINUTES GET 2 SP HOME**

**QUESTION TEXT:**

**ENTER NUMBER OF MINUTES**

**ENTER NUMBER**

Range: 1 to 60

---

### CA14b

**cca1tm2sphrs**

**C1 CA14B HOURS GET 2 SP HOME**

**QUESTION TEXT:**

**ENTER NUMBER OF HOURS**

**ENTER NUMBER**

Range: 1 to 24

Soft Range: 1 to 6

---

### BOX CA15

**BOX CA15**

**NOT ON FILE**
If CA1 = 5 (NEVER HELP WITH HH ACTIVITIES), DK, or RF and CA2 = 5 (NEVER HELP WITH SHOPPING), DK, or RF and CA3 = 2 (NO HELP WITH MEDS), 7 (SP DOES NOT TAKE MEDS), DK, OR RF and CA4 = 2 (NO HELP WITH HANDLING BILLS), DK, or RF and CA6 = 5 (NEVER HELP WITH PERSONAL CARE), DK, or RF AND CA7 = 5 (NEVER HELP WITH GETTING AROUND), DK or RF AND CA9 = 5 (NEVER HELP DRIVING), DK or RF and CA10 = 5 (NEVER GO WITH SP), DK, or RF and CA11a-g = 2 (NO), DK or RF, go to CA15.

Otherwise, go to Section DC - Duration of Care.

CA15  cca1hplstyr  C1 CA15 HLPED W ACTIVITY IN LAST YR

DISPLAY INSTRUCTIONS:
Display date as “Month day, year” with month spelled out.

QUESTION TEXT:
You said that in the last month you didn't help {SP} with any of the activities we just talked about. Did you help {SP} with any of these activities in the last year, that is since {CURRENT YEAR MINUS 1 YEAR}?

CODES
1  YES
2  NO
3  REFUSED
4  DON'T KNOW

PROGRAMMER INSTRUCTIONS:
If CA15 = 1 (YES HELPED IN LAST YEAR), set HELPED IN PREVIOUS MONTHS flag = 1 (YES)

CA16  cca1lstmhlpd  C1 CA16 LAST MONTH HELPED

DISPLAY INSTRUCTIONS:
Display date as “Month, day year” with month spelled out.

QUESTION TEXT:
What was the last month since {CURRENT DATE MINUS 1 YEAR} that you helped {SP} with any of these activities?

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

PROGRAMMER INSTRUCTIONS:
Go to Section DC, Duration of Care

CA17  CA17  NOT ON FILE

QUESTION TEXT:
Those are all of the questions I have for you about helping {SP}. 
PROGRAMMER INSTRUCTIONS:
Set CATI Disposition Code to IE, Ineligible - Did not help SP in last year.
Go to Section CN - Closing
National Study of Caregiving Round 1

Section DC [DURATION OF CARE] Sequence: 2

DC1 cdc1hpsched C1 DC1 HELP ON REGULAR SCHEDULE

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “that you helped {him/her}”.
Otherwise, use null display.

QUESTION TEXT:
Thinking about all of the ways you helped {SP} in the last month {that you helped {him/her}}, did you help on a regular basis or did it vary? By regular schedule, we mean the same days or times every week.

CODES

1 REGULAR SCHEDULE
2 VARIED
3 REFUSED
4 DON’T KNOW

DC2 cdc1hldyswk C1 DC2 NUMB OF DAYS PER WK HELP

QUESTION TEXT:
How many days per week did you help {him/her}?

ENTER NUMBER OF DAYS PER WEEK

ENTER NUMBER

Range 1 to 7
REFUSED DC6
DON’T KNOW DC6

PROGRAMMER INSTRUCTIONS:
If any response other than DK or RF entered, go to DC4.

DC3 cdc1hldysmt C1 DC3 NUMB DAYS HELPD LAST MNTH

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “that you helped {him/her}”.
Otherwise, use null display.

QUESTION TEXT:
In the last month {that you helped {him/her}}, how many days altogether did you help {SP}?

ENTER NUMBER OF DAYS PER MONTH

ENTER NUMBER

Range 1 to 31
REFUSED DC6
DON’T KNOW DC6
DC4  

**cdc1hlphrsdy**  
C1 DC4 NUMB HOURS HELPED PER DAY

**QUESTION TEXT:**

On days when you helped [him/her], about how many hours did you spend helping?

**ENTER NUMBER OF HOURS PER DAY**

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 24</th>
</tr>
</thead>
<tbody>
<tr>
<td>REFUSED</td>
<td>DC6</td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td>DC6</td>
</tr>
</tbody>
</table>

DC5  

**cdc1hlphrmvf**  
C1 DC5 VERFY TOTAL HRS HELP MNTH

**DISPLAY INSTRUCTIONS:**

If DC1 = 1 (REGULAR SCHEDULE), multiply number entered at DC2 (DAYS PER WEEK) by number entered at DC4 (HOURS PER DAY) by 4 [(DC2*DC4)/4]} and display calculated number of hours.

Else if DC1 = 2 (VARIED), RF, or DK, multiply number entered at DC3 (DAYS LAST MONTH) by number entered at DC4 (HOURS ON DAYS HELPED) and display calculated number of hours.

IF HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "in the last month that you helped [him/her]". Otherwise, display "last month".

**QUESTION TEXT:**

So that adds up to about {CALCULATED NUMBER OF HOURS} hours {last month/in the last month that you helped [him/her]}. Does that sound about right?

**CODES**

<table>
<thead>
<tr>
<th>1</th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

DC6  

**cdc1hlphrlmt**  
C1 DC6 HOURS HELPED IN MONTH

**DISPLAY INSTRUCTIONS:**

If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “in the last month that you helped [him/her]”. Otherwise, display “last month”.

**QUESTION TEXT:**

About how many hours altogether {last month/in the last month that you helped [him/her]} would say you helped?

**ENTER NUMBER OF HOURS**

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 744</th>
</tr>
</thead>
<tbody>
<tr>
<td>REFUSED</td>
<td>DC6</td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td>DC6</td>
</tr>
</tbody>
</table>

**BOX DC7**

**BOX DC7**  
NOT ON FILE

If CA6 = 5 (NEVER HELPED WITH PERSONAL CARE), RF, or DK and CA7 = 5 (NEVER HELPED GET AROUND), RF, or DK, go to DC9.
DISPLAY INSTRUCTIONS:

If DC6 > 0, display hours from DC6.
Else if DC1 = 1 (REGULAR SCHEDULE) and DC3>0 and DC4 > 0, multiply number entered at DC2 (DAYS PER WEEK) by number entered at DC4 by 4 and display calculated number of hours.

Else if DC1 = 2 (VARIED), RF, or DK, and DC3 >0 and DC4 >0, multiply number entered at DC3 (DAYS LAST MONTH) by number entered at DC4 (HOURS ON DAYS HELPED) and display calculated number of hours.

Else if DC6 = DK or RF, use null display.

If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "in the last month that you helped {him/her}". Otherwise, display "last month".

If CA6 = 1, 2, 3, or 4, display "personal care"
If CA7 = 1, 2, 3, or 4, display "helping {SP} get around"
If both "personal care" and "helping {SP} get around" are displayed, also display "and".

QUESTION TEXT:

Of the {CALCULATED NUMBER OF HOURS/HOURS FROM DC6} hours you helped {SP} {last month/in the last month that you helped {him/her}}, about how many were spent helping just with {personal care} {and} {helping {him/her} get around}?

ENTER NUMBER

Range 0 to 744
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Number of hours entered cannot exceed total number of hours helped in last month. If it does, display error message "NUMBER OF HOURS HELPED WITH THESE ACTIVITIES CANNOT EXCEED TOTAL NUMBER OF HOURS HELPED IN MONTH. VERIFY WITH RESPONDENT AND RE-ENTER ANSWER."

If number entered at DC7, go to DC9.

DISPLAY INSTRUCTIONS:

If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "in the last month that you helped {him/her}". Otherwise, display "last month."

If CA6 = 1, 2, 3, or 4, display "personal care"
If CA7 = 1, 2, 3, or 4, display "helping {SP} get around"
If both "personal care" and "helping {SP} get around" are displayed, also display "and".

QUESTION TEXT:

If you had to guess, would you say less than half, about half, more than half, or nearly all of the hours you helped {SP} {last month/in the last month that you helped {him/her}} were for {personal care} {and} {helping {him/her} get around}?
**DC9**

**DISPLAY INSTRUCTIONS:**
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "Thinking back from the last month you helped {SP}, had you".
Otherwise, display "Have you".

**QUESTION TEXT:**
{Thinking back from the last month you helped {SP}, had you/Have you} been helping {SP} for a year or longer?

**CODES**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

**BOX DC10**

**CODES**
1. NOT ON FILE

**PROGRAMMER INSTRUCTIONS:**
Go to Section AC – Aspects of Caregiving.
DC11  cdc1hpunit  C1 DC11 UNIT YEARS HELPING SP

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "Thinking back from the last month you helped {SP}, how" and "had". Otherwise, display, "How" and "have".

QUESTION TEXT:
{Thinking back from the last month you helped {SP}, how/How} many years {had/have} you been helping {SP}?

INDICATE RESPONSE UNIT

CODES
1  NUMBER YEARS
2  DATE  DC11b
      REFUSED  DC12
      DON'T KNOW  DC12

DC11a  cdc1hpyrs  C1 DC11A NUMBER OF YEARS HELPING

QUESTION TEXT:
ENTER NUMBER OF YEARS

ENTER NUMBER
Range  0 to 90
Soft Range  1 to 40

PROGRAMMER INSTRUCTIONS:
Go to Section AC.

DC11b  cdc1hpyrst  C1 DC11B YEAR STARTED HELPING

QUESTION TEXT:
ENTER YEAR

ENTER NUMBER
Range  1920 to 2012

PROGRAMMER INSTRUCTIONS:
Edit check: Year entered must be between (CURRENT YEAR - 90) and (CURRENT YEAR - 1). If year entered is outside of edit check, display error message "RESPONSE NOT LIKELY. VERIFY WITH RESPONDENT AND REENTER."

If DC11b = CURRENT YEAR, display error message "LAST YEAR HELPED MUST BE PRIOR TO CURRENT YEAR."

Go to Section AC-Aspects of Caregiving.
**DC12**

**cdc1hlpyrs5p**

**C1 DC12 HELP LONGER THAN FIVE YRS**

**QUESTION TEXT:**

<table>
<thead>
<tr>
<th>Was it 5 years or longer?</th>
</tr>
</thead>
</table>

**CODES**

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<tbody>
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<td>Section AC</td>
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<tr>
<td></td>
<td>DON'T KNOW</td>
<td>Section AC</td>
</tr>
</tbody>
</table>
Now we have a few questions about your relationship with {SP}.

PRESS 1 AND ENTER TO CONTINUE

AC1 QUESTION TEXT: cac1joylevel C1 AC1 ENJOY BEING WITH SP

How much do you enjoy being with {SP}? Would you say a lot, some, a little, or not at all?

CODES

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON’T KNOW

AC2 QUESTION TEXT: cac1arguelv C1 AC2 LEVEL SP ARGUES WITH YOU

How much does {SP} argue with you? Would you say a lot, some, a little, or not at all?

CODES

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON’T KNOW

AC3 QUESTION TEXT: cac1spapprlv C1 AC3 LEVEL SP APPRECIATES YOU

How much does {SP} appreciate what you do for {him/her}?

[Would you say a lot, some, a little, or not at all?]

CODES

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON’T KNOW
AC4 cac1nerveslv

C1 AC4 LEVEL SP ON YOUR NERVES

QUESTION TEXT:
How often does {he/she} get on your nerves?

[Would you say a lot, some, a little, or not at all?]

CODES
1 A LOT
2 SOME
3 A LITTLE
4 NOT AT ALL
REFUSED
DON'T KNOW

AC5 cac1moreconf cac1dealbetr cac1closr2sp cac1moresat

C1 AC5A HLP SP U MORE CNF ABLTY
C1 AC5B HLP SP U DEAL W DIFF SIT
C1 AC5C HLP SP U R CLOSER TO SP
C1 AC5D HLP SP U STSFY SP CARED4

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at AC5a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{[ ]} Next we have a few questions about your experience helping {SP}. For each statement I read, please tell me whether this describes your situation very much, somewhat, or not so much.{[ ]}

{variable text [a-d]}

RESPONSE [1] a. Helping {SP} has made you more confident about your abilities.
RESPONSE [2] b. Helping {him/her} has taught you to deal with difficult situations.
RESPONSE [3] c. Helping {SP} has brought you closer to {him/her}.
RESPONSE [4] d. Helping {SP} gives you satisfaction that {he/she} is well cared for.

CODES
1 VERY MUCH
2 SOMewhat
3 NOT SO MUCH
4 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.

AC6 cac1diffinc cac1diffemo cac1diffphy

C1 AC6A FINANCIAL DIFF HELPING
C1 AC6B EMOTIONAL DIFF HELPING
C1 AC6C PHYSICAL DIFF HELPING

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at AC6a, do not display question text in brackets.
Otherwise, display question text in brackets.

If preloaded relationship of SP to Caregiver is 2 (spouse/partner), display "Helping a spouse or partner who has health problems can be difficult."

If preloaded caregiver is related to SP (relationship codes 3-29), display "Helping older relatives can be difficult."

Otherwise, use null display.

**QUESTION TEXT:**

```
{{}} {{Helping a spouse or partner who has health problems can be difficult./Helping older relatives can be difficult.}} is helping {SP}...{}
{variable text [a-c]}
```

**RESPONSE [1]** a. financially difficult for you?

**RESPONSE [2]** b. emotionally difficult for you?

**RESPONSE [3]** c. physically difficult for you?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

Array the responses and variable text columns in the panel.

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

---

**BOX AC7**

If AC6a, 6b, and 6c = 2 (NO), RF, or DK, go to BOX AC8.

Otherwise, go to AC7.

**AC7**

<table>
<thead>
<tr>
<th>cac1difffinlv</th>
<th>cac1diffemlv</th>
<th>cac1diffphlv</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1 AC7A LEVEL FINANCIALLY DIFF</td>
<td>C1 AC7B LEVEL EMOTIONALLY DIFF</td>
<td>C1 AC7C LEVEL PHYSICALLY DIFF</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

If AC6a = 1 (YES, FINANCIALLY DIFFICULT), display AC7a.
If AC6b = 1 (YES, EMOTIONALLY DIFFICULT), display AC7b.
If AC6c = 1 (YES, PHYSICALLY DIFFICULT), display AC7c.

Use "Same Question Stem" display.

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

**QUESTION TEXT:**

```
{{}} Please tell me how difficult helping is by picking a number from 1 to 5. The number 5 means very difficult and the number 1 means a little difficult.{}
{variable text [a-c]}
```
RESPONSE [1] a. How financially difficult is helping {SP}?\
RESPONSE [2] b. How emotionally difficult is helping {SP}?\
RESPONSE [3] c. How physically difficult is helping {SP}?

CODES
1  1 A LITTLE DIFFICULT
2
3
4
5 5 VERY DIFFICULT
   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.

BOX AC8  BOX AC8  NOT ON FILE
If preloaded relationship of Caregiver to SP is 2 through 12, go to AC8.
Otherwise, go to AC9.

AC8  cac1fmlydisa  C1 AC8 LVL FMLY DISAGR OVER CARE
QUESTION TEXT:
In general, how much has your family disagreed over the details of (SP)’s care? Would you say very much, somewhat, or not so much?

CODES
1  VERY MUCH
2  SOMewhat
3  NOT SO MUCH
   REFUSED
   DON’T KNOW

AC9  cac1exhaustd  C1 AC9A U ARE EXHAUSTED AT NIGHT
   cac1toomuch  C1 AC9B CARE MORE THAN CAN HANDLE
   cac1notime  C1 AC9C U HAVE NO TIME FOR SELF
   cac1routchg  C1 AC9D CARE ROUTINE THEN CHANGES

DISPLAY INSTRUCTIONS:
Use “Same Question Stem” display.
If at AC9a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{[] Please listen to a few more statements and answer whether this describes your situation very much, somewhat, or not so much.[]}
RESPONSE [1] a. You are exhausted when you go to bed at night.
RESPONSE [2] b. You have more things to do than you can handle.
RESPONSE [3] c. You don't have time for yourself.
RESPONSE [4] d. As soon as you get a routine going, {SP}'s needs change.

CODES
1 VERY MUCH
2 SOMEWHAT
3 NOT SO MUCH
   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 SE, Support Environment.
The next questions are about support you may be getting.

PRESS 1 AND ENTER TO CONTINUE

<table>
<thead>
<tr>
<th>SE1 PRE</th>
<th>SE1 PRE</th>
<th>NOT ON FILE</th>
</tr>
</thead>
</table>

**Question Text:**
Do you have friends or family that you talk to about important things in your life?

**Codes:**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

<table>
<thead>
<tr>
<th>SE2</th>
<th>CSE2 FRIENDS FAMILY HLP W ACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE2</td>
<td>CSE2 FRIENDS FAMILY HLP W ACT</td>
</tr>
</tbody>
</table>

**Question Text:**
Do you have friends or family that help you with your daily activities, such as running errands, or helping you with things around the house?

**Codes:**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

<table>
<thead>
<tr>
<th>SE3</th>
<th>CSE3 FRIENDS FAMILY HELP W SP</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE3</td>
<td>CSE3 FRIENDS FAMILY HELP W SP</td>
</tr>
</tbody>
</table>

**Question Text:**
Do you have friends or family that help you care for {SP}?

**Codes:**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

<table>
<thead>
<tr>
<th>SE4</th>
<th>CSE4 GONE TO SUPPORT GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE4</td>
<td>CSE4 GONE TO SUPPORT GROUP</td>
</tr>
</tbody>
</table>

**Question Text:**
In the last year, have you gone to a support group for people who give care?

**Codes:**
1. YES
<table>
<thead>
<tr>
<th>SE4a</th>
<th>cse1srv2hlp</th>
<th>C1 SE4A USED SERV TAKE TIME AWAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISPLAY INSTRUCTIONS:</td>
<td>Display the first “you” in underlined text.</td>
<td></td>
</tr>
<tr>
<td>QUESTION TEXT:</td>
<td>In the last year, have you used any service that took care of {SP} so that you could take some time away from helping?</td>
<td></td>
</tr>
<tr>
<td>CODES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SE5</th>
<th>csetraining</th>
<th>C1 SE5 U RCVD TRAINING 2 HELP</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUESTION TEXT:</td>
<td>In the last year, have you received any training to help you take care of {SP}?</td>
<td></td>
</tr>
<tr>
<td>CODES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SE6</th>
<th>cse1fndfnhlp</th>
<th>C1 SE6 U FOUND FINANCIL HLP 4 SP</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISPLAY INSTRUCTIONS:</td>
<td>Display &quot;, also known as [STATE NAME FOR MEDICAID PROGRAM] in [SP STATE].&quot; if state name for Medicaid in SP’s STATE is not &quot;Medicaid.&quot; Display full state name.</td>
<td></td>
</tr>
<tr>
<td>QUESTION TEXT:</td>
<td>In the last year, have you found financial help for {SP}, including helping {him/her} apply for Medicaid {also known as [STATE NAME FOR MEDICAID PROGRAM] in [SP STATE]}?</td>
<td></td>
</tr>
<tr>
<td>CODES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>PROGRAMMER INSTRUCTIONS:</td>
<td>Use lookup file of STATE NAME FOR MEDICAID PROGRAM.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BOX SE7</th>
<th>BOX SE7</th>
<th>NOT ON FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>If SE4 or SE4a or SE5 or SE6 = 1 (YES, SUPPORT, USED SERVICE, TRAINING, FINANCIAL HELP), go to SE7. Otherwise, go to SE8.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SE7

<table>
<thead>
<tr>
<th>variable text [a-f]</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1 SE7A INFO FROM GOVT OR COMM</td>
</tr>
<tr>
<td>C1 SE7B INFO MED PROVIDER SOC WRKR</td>
</tr>
<tr>
<td>C1 SE7C INFO FROM CHURCH OR SYNAGOG</td>
</tr>
<tr>
<td>C1 SE7D INFO FROM EMPLOYER</td>
</tr>
<tr>
<td>C1 SE7E FOUND INFO ON OWN</td>
</tr>
<tr>
<td>C1 SE7F INFO FROM OTHER SOURCE</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:
If SE4 = 1 (YES), display "the support group".
If SE4a = 1 (YES), display "the service you used in order to take time away".
If SE5 = 1 (YES), display "the training".
If SE6 = 1 (YES), display "financial help for {SP}".
If more than one item displayed, display "and" between each one.

If only one service listed, display "this service".
If more than one service listed, display "these services".
Use "Same Question Stem" display.
If at SE7a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{} We'd like to understand a little more about how you found out about {the support group} {the service you used in order to take time away} {the training} {financial help for {SP}}. Did you find out about {this service/these services}...{}

{} variable text [a-f]

RESPONSE [1] a. from a government or community agency?
IF NEEDED: This includes an area agency on aging, an aging and disability resource center, a senior center, a county or state social service agency, the VA, or any other federal, state, or county government agency.

RESPONSE [2] b. by talking to a medical care provider or social worker?

RESPONSE [3] c. from a church or synagogue?

RESPONSE [4] d. from your employer?

RESPONSE [5] e. on your own, for example, from a friend, online, or at the library?

RESPONSE [6] f. from any other source?

CODES
1 YES
2 NO
3 REFUSED
4 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 SE7f = 1, go to SE7g.
Otherwise, go to BOX SE8.

SE7g

NOT ON FILE

QUESTION TEXT:
SPECIFY OTHER SOURCE OF INFORMATION

ENTER TEXT

Length 75
REFUSED
DON'T KNOW

BOX SE8

BOX SE8 NOT ON FILE

If SE4 = 1 (YES) and SE4a = (YES) and SE5 = 1 (YES) and SE6 = 1 (YES), go to SE10.

Otherwise, go to SE8.

SE8

cse1look4hlp C1 SE8 EVER LOOKED FOR HELP

DISPLAY INSTRUCTIONS:
If SE4 = 2 (NO), DK or RF, display "a support group for people who provide care".
If SE4a = 2 (NO), DK, or RF, display "a service to care for {SP} so you could take time away".
If SE5 = 2 (NO), DK, or RF, display "training to help you care for {SP}".
If SE6 = 2 (NO), DK, or RF, display "information about how to get financial help for {SP}".
If more than one item displayed, display "or" between each one.

QUESTION TEXT:
Have you ever looked for {a support group for people who provide care} {a service to care for {SP} so you could take time away} {training to help you care for {SP}} {information about how to get financial help for {SP}}?

CODES

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>SE10</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>SE10</td>
</tr>
</tbody>
</table>

SE9

cse1look1 C1 SE9A LOOKD FOR INFO GOVT AGCY

cse1look2 C1 SE9B LOOKD FOR INFO MED PROV

cse1look3 C1 SE9C LOOKD FOR INFO RELIGIOUS

cse1look4 C1 SE9D LOOKD FOR INFO EMPLOYER

cse1look5 C1 SE9E LOOKD FOR INFO ON OWN

cse1look6 C1 SE9F LOOKD FOR INFO OTHER

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at SE9a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{} Did you look for this information...{}?

{variable text [a-f]}

RESPONSE [1] a. by contacting a government or community agency?
IF NEEDED: This includes an area agency on aging, an aging and disability resource center, a senior center, a county or state social service agency, the VA, or any other federal, state, or county government agency.
RESPONSE [2] b. by talking to a medical care provider or social worker?
RESPONSE [3] c. by asking a church or synagogue?
RESPONSE [4] d. by asking your employer?
RESPONSE [5] e. on your own, for example, by asking a friend, looking online, or at the library?
RESPONSE [6] f. from any other source?

CODES
1    YES
2    NO
    REFUSED
    DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Array the responses and variable text column in the panel.
Display 'variable text' in the a-f sequence until all rows have been displayed.
If SE9f = 1, go to SE9g.
Otherwise, go to SE10

SE9g

QUESTION TEXT:
SPECIFY THE OTHER SOURCE WHERE INFORMATION WAS LOOKED FOR

ENTER TEXT
Length 75

SE10
cse1hlpgtdev  C1 SE10 HLPD GET MOBILITY DEVICES

QUESTION TEXT:
In the last year, have you helped {SP} to get devices to get around more easily, such as a cane, walker, wheelchair, or scooter?

CODES
1    YES
2    NO
    REFUSED
    DON'T KNOW

SE11
cse1homsafer  C1 SE11 MADE SP HOME SAFER

DISPLAY INSTRUCTIONS:
If preloaded INHOUSEHOLD flag = 1 (lives with SP) display "made your home safer for {SP}".
Otherwise, display "helped {SP} make {his/her} home safer".

QUESTION TEXT:
In the last year, have you {made your home safer for {SP}/helped {SP} make {his/her} home safer} by adding features such as a railing or a ramp, grab bars in the bathroom, a seat for the shower or tub, or an emergency call system?

CODES
1    YES
2    NO
    REFUSED
    DON'T KNOW
### SE12 cse1hlppdhlp

**C1 SE12 HELPED FIND PAID HELPER**

**QUESTION TEXT:**

> In the last year, have you helped [SP] find a paid helper to do household chores or personal care?

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
<th>Section PP</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>
National Study of Caregiving Round 1

Section PP [PARTICIPATION]  Sequence: 5

PP1PRE  PP1PRE  NOT ON FILE

QUESTION TEXT:
Now let's talk about other activities you may have done in the last month.
PRESS 1 AND ENTER TO CONTINUE

PP1  cpp1vstfrfam  C1 PP1 VISIT FAMILY OR FRIENDS

DISPLAY INSTRUCTIONS:
Display PP1, PP2, and PP3 on the same screen.
Display "not" in bold and underlined text.

QUESTION TEXT:
In the last month, did you ever visit in person with friends or family not living with you, either at your home or theirs?

CODES
1 YES
2 NO
4 REFUSED
5 DON'T KNOW

PP2  cpp1hlpkptvs  C1 PP2 KEPT FRM VISITING

DISPLAY INSTRUCTIONS:
Display "not" in bold and underlined text.

QUESTION TEXT:
In the last month, did helping {SP} ever keep you from doing this (visiting in person with friends or family not living with you)?

CODES
1 YES
2 NO
4 REFUSED
5 DON'T KNOW

PP3  cpp1mpvst  C1 PP3 IMPORTNCE OF VISITING

DISPLAY INSTRUCTIONS:
Display "not" in bold and underlined text.

QUESTION TEXT:
How important is it to you to visit in person with friends or family not living with you? Would you say very important, somewhat important, or not so important?

CODES
1 VERY IMPORTANT
2 SOMEWHAT IMPORTANT
3 NOT SO IMPORTANT
**PP4**  
**cpp1gorelgs**  
**C1 PP4 ATTEND RELIGIOUS SERVICES**

**DISPLAY INSTRUCTIONS:**
Display PP4, PP5 and PP6 on the same screen.

**QUESTION TEXT:**
In the last month, did you ever attend religious services?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**PP5**  
**cpp1hlpkptrl**  
**C1 PP5 KEPT FRM RELIG SERV**

**QUESTION TEXT:**
In the last month, did helping {SP} ever keep you from doing this (attending religious services)?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**PP6**  
**cpp1imprel**  
**C1 PP6 IMPORTNCE OF RELIG SERV**

**QUESTION TEXT:**
How important is it to you to attend religious services? Would you say very important, somewhat important, or not so important?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>VERY IMPORTANT</td>
</tr>
<tr>
<td>2</td>
<td>SOMewhat IMPORTANT</td>
</tr>
<tr>
<td>3</td>
<td>NOT SO IMPORTANT</td>
</tr>
<tr>
<td>4</td>
<td>REFUSED</td>
</tr>
<tr>
<td>5</td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**PP7**  
**cpp1prtgroup**  
**C1 PP7 PARTICIPATE GROUP ACTIV**

**DISPLAY INSTRUCTIONS:**
Display PP7, PP8, and PP9 on the same screen.
If PP4 = 1 (YES), display "besides religious services,"

**QUESTION TEXT:**
In the last month, {besides religious services,} did you ever participate in club meetings or group activities?

**IF NEEDED:** These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting or regular exercise groups.

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
</tbody>
</table>
PP8  
**ccp1hlkp*rt**  
**C1 PP8 KEPT FRM GROUP ACTIV**

**DISPLAY INSTRUCTIONS:**

If PA4 = 1 (YES), display "other than religious services".

**QUESTION TEXT:**

In the last month, did helping {SP} ever keep you from doing this (participating in club meetings or group activities other than religious services)?

IF NEEDED: These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting, or regular exercise groups.

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
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*Note that the name of this variable is inconsistent with the rest of the series on the NSOC data file. This inconsistency will be corrected in future waves.*

---

PP9  
**cpp1impgroup**  
**C1 PP9 IMPORTNCE OF GROUP ACTIV**

**DISPLAY INSTRUCTIONS:**

If PA4 = 1 (YES), display "other than religious services".

**QUESTION TEXT:**

How important is it to you to participate in club meetings or group activities other than religious services? Would you say very important, somewhat important, or not so important?

IF NEEDED: These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting or regular exercise groups.

**CODES**

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<td>SOMEWHAT IMPORTANT</td>
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PP10  
**cpp1go4fun**  
**C1 PP10 GO OUT FOR ENJOYMENT**

**DISPLAY INSTRUCTIONS:**

Display PP10, PP11, and PP12 on the same screen.

If PP7 = 1 (YES), display "besides for club or group activities,"

**QUESTION TEXT:**

In the last month, {besides for club or group activities,} did you 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**

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</table>
PP11  cpp1hlkptgo  C1 PP1 KEEP FRM GOING OUT

QUESTION TEXT:
In the last month, did helping {SP} ever keep you 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

PP12  cpp1impgo  C1 PP12 IMPORTNCE OF GOING OUT

QUESTION TEXT:
How important is it to you to go 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

PP13  cpp1wrk4pay  C1 PP13 WORK FR PAY IN LAST MNTH

DISPLAY INSTRUCTIONS:
Display PP13 and PP14 on the same screen.

QUESTION TEXT:
In the last month, did you ever work for pay or at a business you own?

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW

PP14  cpp1hlkptwk  C1 PP14 KEEP FRM WORKING

QUESTION TEXT:
In the last month, did helping {SP} ever keep you from doing this (working for pay)?

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW
**PP15**  
**cpp1volun**  
C1 PP15 VOLUNTEER IN LAST MONTH

**DISPLAY INSTRUCTIONS:**
Display PP15 and PP16 on the same screen.

**QUESTION TEXT:**
In the last month, did you ever do volunteer work?

**CODES**

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</table>

**PP16**  
**cpp1hlpktvo**  
CA PP16 KEPT FRM VOLUNTEER

**QUESTION TEXT:**
In the last month, did helping {SP} ever keep you from doing this (volunteer work)?

**CODES**

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</table>

**PP17**  
**cpp1careothr**  
C1 PP17 PROVIDE CARE ANYONE ELSE

**DISPLAY INSTRUCTIONS:**
Display PP17 and PP18 on the same screen.
If PP13 = 1 (YES, WORKED FOR PAY) or PP15 = 1 (YES, VOLUNTEER WORK), display "besides as {a job/volunteer work/a job or volunteer work}".
If PP13 = 1 (YES, WORKED FOR PAY) and PP15 = 2 (NO), RF or DK, display "a job".
If PP15 = 1 (YES, VOLUNTEER WORK) and PP13 = 2 (NO), RF, or DK, display "volunteer work".
If PP13 = 1 (YES, WORKED FOR PAY) and PP15 = 1 (YES, VOLUNTEER WORK), display "a job or volunteer work".

**QUESTION TEXT:**
In the last month, {besides as {a job/volunteer work/a job or volunteer work}, did you ever provide care to or look after a child or adult who cannot care for themselves? We mean someone besides {SP}.}

**CODES**

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HE1  

**che1health**  

C1 HE1 GENERAL HEALTH  

**QUESTION TEXT:**

Would you say that in general, your health is excellent, very good, good, fair, or poor?  

**CODES**  

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<td>GOOD</td>
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<td>FAIR</td>
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HE2  

**che1hrtattck**  

C1 HE2A HAD HEART ATTACK  

**che1othheart**  

C1 HE2B HAD HEART DISEASE  

**che1highbld**  

C1 HE2C HAD HIGH BLOOD PRESS |

**che1arthrits**  

C1 HE2D HAD ARTHRITIS  

**che1osteoprs**  

C1 HE2E HAD OSTEOPOROSIS  

**che1diabetes**  

C1 HE2F HAD DIABETES  

**che1lungdis**  

C1 HE2G HAD LUNG DISEASE  

**che1cancer**  

C1 HE2H HAD CANCER  

**che1seeing**  

C1 HE2I HAD SERIOUS DIFF SEEING  

**che1hearing**  

C1 HE2J HAD SERIOUS DIFF HEARING  

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.

If at HE2a, do not display question text in brackets.

Otherwise, display question text in brackets.  

**QUESTION TEXT:**

{{} I will read a list of some diseases that a doctor may have said you have. Please tell me if a doctor ever told you that you had...{}}}  

{{variable text [a-j]}}  

RESPONSE [1] a. a heart attack or myocardial infarction?  

RESPONSE [2] b. any other heart disease including angina or congestive heart failure?  

RESPONSE [3] c. high blood pressure or hypertension?  

RESPONSE [4] d. 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. cancer?  

RESPONSE [9] i. serious difficulty seeing?  

RESPONSE [10] j. serious difficulty hearing?  

**CODES**  

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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.

BOX HE3

If HE2h = 1 (YES, CANCER), go to HE3. Otherwise, go to HE4PRE.

HE3

che1cncrskin C1 HE3 CANCER TYPE SKIN CANCER
che1cnrcrbrst C1 HE3 CANCER TYPE BREAST CANCER
che1cncrpros C1 HE3 CANCER TYPE PROSTATE CANCER
che1cncroth C1 HE3 CANCER TYPE OTHER TYPE

DISPLAY INSTRUCTIONS:
If pre-loaded CG SEX= 2 (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 HE4PRE
2 BREAST CANCER HE4PRE
3 {PROSTATE CANCER} HE4PRE
4 OTHER TYPE OF CANCER (SPECIFY) HE4PRE

HE3a

SPECIFY TYPE OF CANCER

IF NEEDED: What type of cancer was that?

ENTER TEXT

Length 50
REFUSED
DON'T KNOW

HE4PRE

PRESS 1 AND ENTER TO CONTINUE

HE4

che1pain C1 HE4 PAIN IN LAST MONTH

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.
QUESTION TEXT:
In the last month, have you been bothered by pain?

CODES
1 YES
2 NO
3 REFUSED
4 DON’T KNOW

HE5 che1painlimt C1 HE5 PAIN OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often has pain limited your activities? Would you say every day, most days, some days, rarely, or never?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON’T KNOW

HE6 che1brethprb C1 HE6 BREATHING PROBLEMS

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have any breathing problems, including shortness of breath or difficulty breathing?

CODES
1 YES
2 NO
3 REFUSED
4 DON’T KNOW

HE7 che1brethlimt C1 HE7 BREATHING OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did your breathing problems limit your activities? Would you say every day, most days, some days, rarely, or never?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
DON'T KNOW

HE8

che1armstr

C1 HE8 LIMITED STRENGTH IN ARMS

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have limited strength or movement in your shoulders, arms, or hands?

CODES
1 YES
2 NO
3 REFUSED
4 DON'T KNOW

HE9

che1armlmt

C1 HE9 ARM STRENGTH OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did this problem with your shoulders, arms or hands limit your activities?
[Would you say every day, most days, some days, rarely, or never?]

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON'T KNOW

HE10

che1legstr

C1 HE10 LIMITED STRENGTH IN LEGS

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have limited strength in your hips, legs, knees, or feet?

CODES
1 YES
2 NO
3 REFUSED
4 DON'T KNOW

HE11

che1leglmt

C1 HE11 LEG STRENGTH OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did this problem with your hips, legs, knees, or feet limit your activities?
[Would you say every day, most days, some days, rarely, or never?]
### CODES

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#### HE12 che1lowenrgy

**C1 HE12 LOW ENERGY IN LAST MONTH**

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**
**In the last month, did you have low energy or were you easily exhausted?**

**CODES**

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#### HE13 che1energylmnt

**C1 HE13 ENERGY OFT LIMITED**

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**
**In the last month, how often did your low energy or exhaustion limit your activities?**

[Would you say every day, most days, some days, rarely, or never?]

**CODES**

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#### HE14 che1sleeptrb

**C1 HE14 TROUBL FALLNG BACK ASLEP**

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**
**In the last month, on nights when you woke up before you wanted to, how often did you have trouble falling back asleep?**

[Would you say every day, most days, some days, rarely, or never?]

**CODES**

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<td>MOST NIGHTS</td>
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<td>SOME NIGHTS</td>
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4 RARELY
5 NEVER
REFUSED
DON'T KNOW

**BOX HE15**

*NOT ON FILE*

If preloaded INHOUSELHOLD flag = 1 for Caregiver, go to HE15.

Otherwise, go to HE16.

**HE15**

che1sleepint C1 HE15 INTERRUPTED SLEEP

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**
In the last month, how often did helping [SP] cause your sleep to be interrupted?

[Would you say every day, most days, some days, rarely, or never?]

**CODES**

1 EVERY NIGHT
2 MOST NIGHTS
3 SOME NIGHTS
4 RARELY
5 NEVER
REFUSED
DON'T KNOW

**HE16**

che1weight C1 HE16 WEIGHT IN POUNDS

**QUESTION TEXT:**
How much do you currently weigh?

ENTER WEIGHT IN POUNDS

**ENTER NUMBER**

Range 65 to 600
Soft Range 90 to 300
REFUSED
DON'T KNOW

**HE17a**

che1heightft C1 HE17A HEIGHT IN FEET

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

ENTER FEET

**ENTER NUMBER**

Range 3 to 7
Soft Range 4 to 6
REFUSED HE18
DON'T KNOW HE18

**HE17b**

che1heightin C1 HE17B HEIGHT INCHES
**QUESTION TEXT:**

[How tall are you?]

ENTER INCHES

**ENTER NUMBER**

Range 0 to 11
REFUSED DON'T KNOW

**HE18**

**QUESTIONS TEXT:**

CHE110LBD HE18 IN YR LOST 10 POUNDS

**CODES**

1 YES
2 NO
REFUSED
DON'T KNOW

**HE18a**

**QUESTIONS TEXT:**

CHE1TRY2LOSE HE18A TRYING TO LOSE WEIGHT

**CODES**

1 YES
2 NO
REFUSED
DON'T KNOW

**HE19**

**QUESTIONS TEXT:**

CHE1MOODCHER C1 HE19A CG FELT CHEERFUL
CHE1MOODPCFL C1 HE19B CG FELT CALM PEACEFUL
CHE1MOODFULL C1 HE19C CG FELT FULL OF LIFE
CHE1MOODBORD C1 HE19D CG FELT BORED
CHE1MOODLONE C1 HE19E CG FELT LONELY
CHE1MOODUPST C1 H319F CG FELT UPSET

**DISPLAY INSTRUCTIONS:**

Use “Same Question Stem” display.
If at HE19a, do not display question text in brackets.
Otherwise, display question text in brackets.
Display “the last month” in underlined text.

**QUESTION TEXT:**

{} Thinking about the last month, how often did you feel…{}

{variable text [a-f]}

RESPONSE [1] a. cheerful?
RESPONSE [2] b. calm and peaceful?
RESPONSE [3] c. full of life?
RESPONSE [4] d. bored?
RESPONSE [5] e. lonely?
RESPONSE [6] f. upset?
{[Ov\text{er the last month, how often have you...}{}\]}

\{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?

{[Would you say 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
5. REFUSED
6. 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.

HE21

\text{che1lifemng} \quad C1 \text{HE21A LIFE HAS MEANING PURPOSES}
\text{che1feelfconf} \quad C1 \text{HE21B CG FEELS CONFIDENT}
\text{che1gaveup} \quad C1 \text{HE21C CG GAVEUP IMPROVING LIFE}
\text{che1lifegood} \quad C1 \text{HE21D CG LIKES LIVING SITUATN}
\text{che1lifelone} \quad C1 \text{HE21E CG FEELS LONELY}
che1easychng C1 HE21F CG ADJUSTS CHANGE EASILY
che1rcvrqick C1 HE21G CG RECOVERS QUICKLY

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at HE21a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{
Now I’m going to read a few statements.
Think about yourself, and after each statement, please tell me whether you agree strongly, agree somewhat, disagree somewhat, or disagree strongly. {}
{variable text [a-g]}
RESPONSE [5] e. I often feel lonely because I have few close friends.
RESPONSE [6] f. I have an easy time adjusting to changes.
RESPONSE [7] g. I get over (recover from) illness and hardship quickly.

CODES
1 AGREE STRONGLY Section HD
2 AGREE SOMEWHAT Section HD
3 DISAGREE SOMEWHAT Section HD
4 DISAGREE STRONGLY Section HD
REFUSED Section HD
DON’T KNOW Section HD

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.
National Study of Caregiving Round 1

Section HD [HOUSEHOLD COMPOSITION AND DEMOGRAPHICS] Sequence: 7

BOX HD1

If preloaded CG RELATIONSHIP to SP = 2 (SPOUSE/PARTNER), go to section EC - Employment and Caregiving. Otherwise, go to HD1.

HD1

chd1martstat C1 HD1 MARITAL STATUS
chd1dmartstat C1 D HD1 MARITAL STATUS

DISPLAY INSTRUCTIONS:
Display “currently” in bold, underlined text.

QUESTION TEXT:
Are you currently married, living with a partner, separated, divorced, widowed, or never married?

CODES
1 MARRIED HD3
2 LIVING WITH A PARTNER HD3
3 SEPARATED HD3
4 DIVORCED HD3
5 WIDOWED HD3
6 NEVER MARRIED HD3
7 REFUSED HD3
8 DON’T KNOW HD3

HD2

chd1marendmt C1 HD2 MONTH MARRIAGE ENDED

DISPLAY INSTRUCTIONS:
If HD1 = 4 (DIVORCED), display "(most recent) marriage end".
If HD1 = 5 (WIDOWED), display "spouse pass away".

QUESTION TEXT:
In what month and year did your {(most recent) marriage end/spouse pass away}?

ENTER NUMBER
Range 1 to 12
REFUSED
DON’T KNOW

HD2a

chd1marendyr C1 HD2A YEAR MARRIAGE ENDED

DISPLAY INSTRUCTIONS:
If HD1 = 4 (DIVORCED), display "(most recent) marriage end".
If HD1 = 5 (WIDOWED), display "spouse pass away".

QUESTION TEXT:
[In what month and year did your {(most recent) marriage end/spouse pass away}?]
ENTER 4-DIGIT YEAR

ENTER NUMBER

Range 1920 to 2010
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
If Month and year entered are after TODAY'S MONTH AND YEAR, display error message #5.

HD3

chd1chldlvng C1 HD3 HAVE CHILDREN LIVING
chd1chd1dlvng C1 D HD3 HAVE CHILDREN LIVING

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) display "and your spouse".
IF HD1 = 2 (LIVING WITH A PARTNER), display "and your partner".

QUESTION TEXT:
Do you {and your {spouse/partner}} have any living children, including stepchildren?

CODES

| 1 | YES |
| 2 | NO |
|   | REFUSED |
|   | DON'T KNOW |
|   | BOX HD6 |

HD4

chd1numchild C1 HD4 NUMBER OF CHILDREN
chd1dnumchild C1 D HD4 NUMBER OF CHILDREN

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED), display "and your spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "and your partner".

QUESTION TEXT:
How many children do you {and your {spouse/partner}} have?

ENTER NUMBER

ENTER NUMBER

Range 1 to 24
Soft Range 1 to 10
REFUSED BOX HD6

HD5

chd1numch18 C1 HD5 NUMBER CHILDREN UNDER 18
chd1dnumch18 C1 D HD5 NUMBER CHILDREN UNDER 18

QUESTION TEXT:
How many are under the age of 18?

ENTER NUMBER
IF NONE, ENTER ZERO

ENTER NUMBER

Range 0 to 24
PROGRAMMER INSTRUCTIONS:
Number of children under age 18 must be < or = number of children entered at HD4, or RF. Otherwise, display error message "The number of children under age 18 must be less than or equal to the total number of children."

BOX HD6

C1 HD6 NUMBR OF PEOPLE LIVE HERE EXCLUDING CG
C1 D HD6 NUMBR OF PEOPLE LIVE HERE INCLUDING CG

DISPLAY INSTRUCTIONS:
Display “other” in bold underlined text.

QUESTION TEXT:
Not counting you, how many other people live here?
ENTER NUMBER
IF NO ONE ELSE, ENTER ZERO

ENTER NUMBER
Range 0 to 20
Soft Range 0 to 15
REFUSED
DON'T KNOW

BOX HD7

C1 HD7 HIGHEST DEGREE OR GRADE
C1 D HD7 HIGHEST DEGREE OR GRADE

QUESTION TEXT:
What is the highest degree or level of school you 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 HD8

NOT ON FILE
If HD1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HD8. Otherwise, go to HD9.

**HD8**

| ch1educsprt | C1 HD8 SPOUS PARTR HIGH DEGREE |
| ch1deducsprt | C1 D HD8 SPOUS PARTR HIGH DEGREE |

**DISPLAY INSTRUCTIONS:**

- If HD1 = 1 (MARRIED), display “spouse”.
- IF HD1 = 2 (LIVING WITH A PARTNER), display “partner”.

**QUESTION TEXT:**

What is the highest degree or level of school your {spouse/partner} 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

**HD9**

| chd1cgbrthmt | C1 HD9 CG BIRTHDATE MONTH |
| chd1dcgbirthyr | C1 D HD9 CG BIRTHDATE MONTH |
| chd1cgbirthyr | C1 HD9 CG BIRTHDATE YEAR |
| chd1dcgbirthyr | C1 D HD9 CG BIRTHDATE YEAR |
| chd1dcgage | C1 D HD9 CG AGE |

**QUESTION TEXT:**

What is your date of birth?

ENTER MONTH, DAY, AND YEAR

REFUSED
DON’T KNOW

**PROGRAMMER INSTRUCTIONS:**

Use mask to collect DOB. Separate mm/dd/yyyy with forward slashes for data entry.

Month range: 1-12
Day range: 1-31
Year range: (CURRENT YEAR-18) - (CURRENT YEAR-110)

**BOX HD10**

If HD1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HD10. Otherwise, go to HD11.
HD10  chd1spbrthmt  C1 HD10 SPOUS PART DOB MONTH
    chd1spbrthmt  C1 D HD10 SPOUS PART DOB MONTH  
    chd1spbrthyr  C1 HD10 SPOUS PART DOB YEAR
    chd1spbrthyr  C1 D HD10 SPOUS PART DOB YEAR  
    chd1spouage  C1 D HD10 SPOUS PART AGE

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

QUESTION TEXT:
What is your {spouse/partner}'s date of birth?
ENTER MONTH, DAY, AND YEAR

REFUSED
DON'T KNOW

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-18) - (CURRENT YEAR-110)

HD11  NOT ON FILE

DISPLAY INSTRUCTIONS:
If CAREGIVER'S preloaded PERSON GENDER = 1 (male), display male.
If CAREGIVER'S preloaded PERSON GENDER = 2 (female), display female.

QUESTION TEXT:
CONFIRM GENDER OF RESPONDENT.
IF GENDER IS OBVIOUS, CODE WITHOUT ASKING.
OTHERWISE, ASK: We have you listed as {male/female}. Is that correct?

CODES

1  YES  SECTION EC
2  NO
       REFUSED  SECTION EC
       DON'T KNOW  SECTION EC

HD12  NOT ON FILE

QUESTION TEXT:
CODE GENDER OF RESPONDENT

CODES

1  MALE  Section EC
2  FEMALE  Section EC

Derived Variables from Items in HD Section

<table>
<thead>
<tr>
<th>Derived Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>c1dgender</td>
<td>C1 D HD 11 12 CG GENDER</td>
</tr>
</tbody>
</table>
Now I'd like to ask you some questions about work and jobs you may have had.

PRESS 1 AND ENTER TO CONTINUE

QUESTIONS:

Did you do any work for pay in the last week? By the last week, I mean the week beginning on Sunday, {MONTH AND DAY OF SUNDAY PRIOR TO TODAY/MONTH AND DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE} and ending {today/on Saturday, {MONTH AND DAY OF SATURDAY PRIOR TO TODAY'S DATE}}?

CODES
1 YES
2 NO
3 RETIRED/DON’T WORK ANYMORE
   REFUSED
   DON’T KNOW

Do you {or your {spouse/partner}} own a business or farm?

CODES
1 YES
2 NO
   REFUSED
   DON’T KNOW

If EC1 = 1 (YES, WORKED LAST WEEK), go to EC6.
If EC1 = 2 (NO), RF, or DK and EC2 = 2 (NO FARM OR BUSINESS), RF, or DK, go to EC4.
If EC1 = 3 (RETIRED) and EC2 = 2 (NO FARM OR BUSINESS), RF, or DK, go to EC21.
Otherwise, go to EC3.
**EC3**  
**cec1unpdwrk**  
C1 EC3 UNPAID WRK FAM BUS LST WK

DISPLAY INSTRUCTIONS:
Display “unpaid” in bold underlined text.

**QUESTION TEXT:**
Last week, did you do any unpaid work in the family business or farm?

**CODES**
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**BOX EC4**  
**BOX EC4**  
NOT ON FILE

IF EC1 = 3 (RETIRED), go to EC21.  
Otherwise, go to EC4.

**EC4**  
**cec1misswork**  
C1 EC4 ABSENT FROM JOB LAST WEEK

DISPLAY INSTRUCTIONS:
If EC3 = 1(YES), display “another”.  
Otherwise, display “a”.

**QUESTION TEXT:**
Do you have {a/another} job from which you were absent last week because of illness, vacation, or some other reason?

**CODES**
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td>3</td>
<td>RETIRED/DON’T WORK ANYMORE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**EC5**  
**cec1look4wrk**  
C1 EC5 LOOKING FOR JOB LAID OFF

**QUESTION TEXT:**
In the last week, were you looking for a job or were you on layoff from a job?

**CODES**
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES, LOOKING FOR A JOB</td>
</tr>
<tr>
<td>2</td>
<td>YES, ON LAYOFF</td>
</tr>
<tr>
<td>3</td>
<td>NO</td>
</tr>
<tr>
<td>4</td>
<td>RETIRED/DON’T WORK ANYMORE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**EC6**  
**cec1wrkmulti**  
C1 EC6 HAVE MORE THAN ONE JOB

**QUESTION TEXT:**
Last week, did you have more than one job, including part-time, evening, or weekend work?

**CODES**
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
</tbody>
</table>
EC7  cec1hrsweek  C1 EC7 HRS PER WEEK AT MAIN JOB

DISPLAY INSTRUCTIONS:
If EC6 = 1 (YES, MORE THAN 1 JOB), display "main job" and "By main job, I mean the job at which you work the most hours."

Otherwise, display "job".

QUESTION TEXT:
How many hours per week do you usually work at your {job/main job}? {By main job, I mean the job at which you work the most hours.}
ENTER NUMBER OF HOURS USUALLY WORK
IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997

ENTER NUMBER
Range  1 to 120
Soft Range  1 to 80
REFUSED  BOX EC10

PROGRAMMER INSTRUCTIONS:
Allow entry of 997. If 997 entered, go to BOX EC8.

BOX EC8  BOX EC8  NOT ON FILE

If EC4 = 1 (YES, ABSENT LAST WEEK), go to EC9.
Otherwise, go to EC8.

EC8  cec1hrs1stwk  C1 EC8 NUMB HRS WORKED LAST WEEK

QUESTION TEXT:
How many hours did you work last week?
ENTER NUMBER OF HOURS

ENTER NUMBER
Range  1 to 120
Soft Range  1 to 80
REFUSED  DON'T KNOW

BOX EC9  BOX EC9  NOT ON FILE

If EC4 = 1 (YES, MORE THAN 1 JOB), go to EC10.
Otherwise, go to EC11.

EC9  cec1hrslast  C1 EC9 HRS WRKED LST WEEK WORKED

QUESTION TEXT:
You said you were absent from work last week. How many hours did you work the last week you were at work?
**EC10**

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 120</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soft Range</td>
<td>1 to 80</td>
</tr>
<tr>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

**BOX EC10**

If EC6 = 1 (YES), go to EC10.
Otherwise, go to EC11.

**EC10**

**CEC10 HOURS WORKED AT ALL JOBS**

**QUESTION TEXT:**

How many hours do you usually work on all of your jobs together?

**ENTER NUMBER OF HOURS**

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 120</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soft Range</td>
<td>1 to 80</td>
</tr>
<tr>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

**EC11**

**CEC11 HAVE FLEXIBLE HOURS**

**QUESTION TEXT:**

Do you have flexible work hours that allow you to vary or make changes in the time you begin and end work?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>2</td>
<td>REFUSED</td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**EC12**

**CEC12 WORK SCHEDULE**

**DISPLAY INSTRUCTIONS:**

If EC6 = 1 (YES, WORKS MORE THAN 1 JOB), display "On your main job, do".
Otherwise, display "Do".

**QUESTION TEXT:**

{On your main job, do/Do} you usually work a daytime schedule or some other schedule?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>DAYTIME</th>
<th>SOME OTHER SCHEDULE</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DAYTIME</td>
<td>SOME OTHER SCHEDULE</td>
<td>REFUSED</td>
<td>DON'T KNOW</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If EC4 = 1 (YES, ABSENT FROM WORK), go to EC14. Otherwise, go to EC13.

**EC13**

**BOX EC13**

**ec1msswrkmt**

C1 EC13 EVER ABSENT FROM WORK

**DISPLAY INSTRUCTIONS:**

Spell out month for date display.

**QUESTION TEXT:**

Now thinking back over the last month, (by last month we mean the last 4 weeks or since {CURRENT DATE MINUS 4 WEEKS}), were you ever absent from work for any reason?

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**EC14**

**BOX EC14**

**ec1mskwkvcnt**

C1 EC14A MISS WORK VACATION

**ec1mswksick**

C1 EC14B MISS WORK SICK

**ec1mswkhelp**

C1 EC14C MISS WORK HELPING

**ec1mswkfmly**

C1 EC14D MISS WORK FAM SICK

**ec1mswkpers**

C1 EC14E MISS WORK PERSONAL

**DISPLAY INSTRUCTIONS:**

If EC4 = 1 (YES, ABSENT LAST WEEK), display "You said you were absent from work last week. Think about that time and any other time in the last month since {CURRENT DATE MINUS 4 WEEKS}) when you missed work."

Otherwise, use null display.

Use "Same Question Stem" display.

If at EC14a, do not display question text in brackets.

Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[} You said you were absent from work last week. Think about that time and any other time in the last month (since {CURRENT DATE MINUS 4 WEEKS}) when you missed work. {]}

{[} I will read a few reasons people miss work. For each one, please say "yes" if this was a reason you missed work over the last month, and say "no" if you did not miss work for this reason. {]}

{variable text [a-e]}

RESPONSE [1] a. You were on vacation.
RESPONSE [2] b. You were sick.
RESPONSE [3] c. You took time off to help {SP}.
RESPONSE [4] d. Other family members were sick.
RESPONSE [5] e. You took personal time for other reasons.

IF NEEDED: For example, a school visit for a child, looking for a job, taking classes.

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
</tbody>
</table>
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.

EC15  cec1mswkunit  C1 EC15 HRS MISS WORK HELP UNIT

QUESTION TEXT:
You said one of the reasons you were absent from work last month was because you were helping {SP}. About how many hours of work did you miss last month to do this?

CODES
1  ENTER NUMBER OF HOURS
2  ENTER NUMBER OF DAYS  EC15b
   REFUSED  EC17
   DON'T KNOW  EC17

PROGRAMMER INSTRUCTIONS:
Display EC15 and either EC15a or EC15b on the same screen.

EC15a  cec1mswkhlph  C1 EC15A NUM HRS MISS WORK HELP

QUESTION TEXT:
ENTER NUMBER OF HOURS

ENTER NUMBER

Range  1 to 600
Soft Range  1 to 160

PROGRAMMER INSTRUCTIONS:
Go To EC17.

EC15b  cec1mswkhlpd  C1 EC15B NUM DYS MISS WORK HELP

QUESTION TEXT:
ENTER NUMBER OF DAYS

ENTER NUMBER

Range  1 to 31

EC16  cec1wkhrperd  C1 EC16 NUM OF HOURS IN WORK DAY

QUESTION TEXT:
Were those 8-hour work days, something less, or something more?

CODES
1  8-HOUR DAYS
2  SOMETHING LESS
3  SOMETHING MORE
   REFUSED
We are interested in whether helping {SP} affects you at work. In the last month, did helping {him/her} make it harder for you to get your work done?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>EC19PRE</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td>EC19PRE</td>
</tr>
</tbody>
</table>

Please tell me how much helping {SP} affected you at work by picking a number from 1 to 10. The number 10 means helping {him/her} made your work a lot harder and the number 1 means helping {him/her} made your work a little harder.

**ENTER NUMBER**

Range 1 to 10

If EC6 = 2 (NO), RF, or DK, display "your job".
If EC6 = 1 (YES, MORE THAN 1 JOB), display "your main job".
If EC5 = 2 (ON LAYOFF), display "the job you are on layoff from."

Now I have two questions about {your job/your main job/the job you are on layoff from}.

PRESS 1 AND ENTER TO CONTINUE

What kind of business or industry is this?

IF NEEDED: What do they make or where do you work?

ENTER INDUSTRY DESCRIPTION

Length 75
**EC20**

**QUESTION TEXT:**
What kind of work do you do, that is, what is your occupation? (For example, plumber, typist, farmer)

**ENTER OCCUPATION DESCRIPTION**

<table>
<thead>
<tr>
<th>ENTER TEXT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Length</td>
<td>75</td>
</tr>
<tr>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

**EC21**

**DISPLAY INSTRUCTIONS:**
If EC20 not empty, display “also” and response option 2 (CURRENT OCCUPATION SAME).

**QUESTION TEXT:**
We are [also] interested in the work people did most of their lives. What kind of work was that? (In other words, what was your occupation?)

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>ENTER OCCUPATION</th>
<th>CURRENT OCCUPATION SAME</th>
<th>NEVER WORKED ENTIRE LIFE</th>
<th>HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>2</td>
<td>97</td>
<td>98</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EC21a**

**QUESTION TEXT:**
ENTER OCCUPATION DESCRIPTION

**ENTER TEXT**

<table>
<thead>
<tr>
<th>ENTER TEXT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Length</td>
<td>75</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
Go to Section HI, Health Insurance and Income
We have a few last questions.

PRESS 1 AND ENTER TO CONTINUE

**HI1**

**QUESTION TEXT:**
Are you currently covered by Medicare, a health insurance program for person 65 years and over and for persons with disabilities?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**HI2**

**QUESTION TEXT:**
Some people with Medicare also have a Medigap or Medicare Supplement plan. Do you have this type of health insurance coverage?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**HI3**

**DISPLAY INSTRUCTIONS:**
Display ", also known as {STATE NAME FOR MEDICAID PROGRAM}," if caregiver’s state name for Medicaid is not "Medicaid."
Display {STATE NAME FOR SCHIP PROGRAM} for caregiver’s state.

**QUESTION TEXT:**
Medicaid {}, also known as {STATE NAME FOR MEDICAID PROGRAM} and {STATE NAME FOR SCHIP PROGRAM} are state programs for low-income persons or for persons on public assistance.

Are you now covered by {STATE NAME FOR MEDICAID PROGRAM} or {STATE NAME FOR SCHIP PROGRAM}?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>
PROGRAMMER INSTRUCTIONS:
Use lookup file for State Medicaid and SCHIP programs.

HI4

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "or your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

QUESTION TEXT:
Are you currently covered by a private health insurance plan?

IF NEEDED: This may be a policy you {or your {spouse/partner} have through a job, a labor union, or an association or organization you belong to. It may also be bought directly from an insurance agent or company.

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW

HI5

QUESTION TEXT:
TRICARE and CHAMPVA are health care programs for active duty and retired members of the uniformed Armed Forces, their families, and survivors. Are you now covered by either one of these programs?

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW

BOX HI6

BOX HI6
NOT ON FILE

If HI1, HI3, HI4, and HI5 = 2 (NO), RF, or DK, go to HI6.
Otherwise, go to BOX HI8.

HI6

QUESTION TEXT:
Based on your answers, you are uninsured and do not currently have any health insurance. Is that correct?

CODES
1  YES
   BOX HI8
2  NO
   REFUSED
   DON'T KNOW
   BOX HI8
   BOX HI8

HI7

QUESTION TEXT:
What kind of health insurance do you have?
CODES
1  MEDICARE  BOX HI8
2  MEDICAID  BOX HI8
3  PRIVATE HEALTH INSURANCE  BOX HI8
4  TRICARE/CHAMPVA  BOX HI8
91  OTHER (SPECIFY)  BOX HI8
99  REFUSED  BOX HI8
       DON’T KNOW  BOX HI8

HI7a  chitinstypos  C1 HI7A INSURANCE TYPE OTHR SPEC

QUESTION TEXT:
SPECIFY THE TYPE OF HEALTH INSURANCE

ENTER TEXT
Length
REFUSED
DON’T KNOW

75

HI8  chitownhome  C1 HI8 OWN YOUR HOME
       chitdownhome  C1 D HI8 OWN YOUR HOME

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display {IF OWNERSHIP WITH
{SPOUSE/PARTNER}, CODE YES.}.
If HD1 = 1 (MARRIED), display "SPOUSE".
If HD1 = 2 (LIVING WITH A PARTNER), display "PARTNER".

QUESTION TEXT:
Do you own your home?
{IF OWNERSHIP IS WITH [SPOUSE/PARTNER], CODE YES.}

CODES
1  YES
2  NO
       REFUSED
       DON’T KNOW

HI9  chitchkacct  C1 HI9A CGHAS CHECKING ACCT
       chitdchkacct  C1 D HI9A CGHAS CHECKING ACCT
       chitvgsacct  C1 HI9B CG HAS SAVINGS ACCOUNT
       chitdvgacct  C1 D HI9B CG HAS SAVINGS ACCOUNT
       chitcertdpst  C1 HI9C CG HAS CERT OF DEPOSIT
       chitdcertdpst  C1 D HI9C CG HAS CERT OF DEPOSIT
DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "and your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

Use "Same Question Stem" display.

If at HI9a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{} Do you {and your {spouse/partner}} have... {} 

{variable text [a-e]}

RESPONSE [1] a. any checking accounts?
RESPONSE [2] b. savings or money market accounts?
RESPONSE [3] c. certificates of deposit?
RESPONSE [4] d. retirement plans such as IRAs, SEPs, 401K, or 403b plans?
RESPONSE [5] e. stocks or mutual funds that are not in retirement accounts?

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-e sequence until all rows have been displayed.

HI10  chitincome  C1 HI10 INCOME LAST YEAR
      chitincmf  C1 F IMPUTED INCOME LAST YEAR FLG
      chitincm1  C1 HI10 IMPUTED INCOME LAST YEAR1
      chitincm2  C1 HI10 IMPUTED INCOME LAST YEAR2
      chitincm3  C1 HI10 IMPUTED INCOME LAST YEAR3
      chitincm4  C1 HI10 IMPUTED INCOME LAST YEAR4
      chitincm5  C1 HI10 IMPUTED INCOME LAST YEAR5

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "or your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

If EC1 or EC4 = 1 (YES), display "from work and".

Display "last year" in bold underlined text.

QUESTION TEXT:
Now thinking about the income that you {and your {spouse/partner}} have {from work and} all other
sources, about how much was your [and your [spouse/partner]'s] total income for the last year (in the last 12 months ending in December {CURRENT YEAR - 1}) before taxes?

IF NEEDED: We don't need an exact dollar amount. The nearest thousand dollars is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this detail to understand how people who are helping older relatives or friends are getting along financially these days.

ENTER TOTAL INCOME FOR LAST YEAR

ENTER NUMBER

Range 1 to 99999999
REFUSED HI14
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Display dollar amount entries using 1000 coma separator.
If amount entered, go to HI14

BOX HI11

Compute CAREGIVER HHSIZE:
If CAREGIVER has INHOUSEHOLD flag = 1, use NHATS HH SIZE.
Otherwise, CAREGIVER HHSIZE = number entered at HD6 +1.

The following table presents the poverty guidelines used to compute the percentage of poverty amounts for HH11-HH13. The amounts displayed in HH11-HH13 are based on the amounts presented for the caregiver's computed HHSIZE.

<table>
<thead>
<tr>
<th>HHSIZE</th>
<th>2010 Poverty Guidelines</th>
<th>100% of poverty</th>
<th>200% of poverty</th>
<th>400% of poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$10,800</td>
<td>$10,800</td>
<td>$21,600</td>
<td>$43,200</td>
</tr>
<tr>
<td>2</td>
<td>$14,600</td>
<td>$14,600</td>
<td>$29,200</td>
<td>$58,400</td>
</tr>
<tr>
<td>3</td>
<td>$18,300</td>
<td>$18,300</td>
<td>$36,600</td>
<td>$73,200</td>
</tr>
<tr>
<td>4</td>
<td>$22,200</td>
<td>$22,200</td>
<td>$44,400</td>
<td>$88,800</td>
</tr>
<tr>
<td>5</td>
<td>$25,800</td>
<td>$25,800</td>
<td>$51,600</td>
<td>$103,200</td>
</tr>
<tr>
<td>6</td>
<td>$29,500</td>
<td>$29,500</td>
<td>$59,000</td>
<td>$118,000</td>
</tr>
<tr>
<td>7</td>
<td>$33,300</td>
<td>$33,300</td>
<td>$66,600</td>
<td>$133,200</td>
</tr>
<tr>
<td>8+</td>
<td>$37,000</td>
<td>$37,000</td>
<td>$74,000</td>
<td>$148,000</td>
</tr>
</tbody>
</table>

HI11

DISPLAY INSTRUCTIONS:
Display for (200% OF POVERTY GUIDELINE) uses the following conditions:
If CAREGIVER HHSIZE = 1, set 200% OF POVERTY GUIDELINE = $21,600 and display "$21,600".
If CAREGIVER HHSIZE = 2, set 200% OF POVERTY GUIDELINE = $29,200 and display "$29,200".
If CAREGIVER HHSIZE = 3, set 200% OF POVERTY GUIDELINE = $36,600 and display "$36,600".
If CAREGIVER HHSIZE = 4, set 200% OF POVERTY GUIDELINE = $44,400 and display "$44,400".
If CAREGIVER HHSIZE = 5, set 200% OF POVERTY GUIDELINE = $51,600 and display "$51,600".
If CAREGIVER HHSIZE = 6, set 200% OF POVERTY GUIDELINE = $59,000 and display "$59,000".
If CAREGIVER HHSIZE = 7, set 200% OF POVERTY GUIDELINE = $66,600 and display "$66,600".
If CAREGIVER HHSIZE = or >8, set 200% OF POVERTY GUIDELINE = $74,000 and display "$74,000".

QUESTION TEXT:
Was it less than or more than $200% OF POVERTY GUIDELINE?
CODES

<table>
<thead>
<tr>
<th></th>
<th>LESS THAN</th>
<th>MORE THAN</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hi13</td>
<td>Hi14</td>
<td>Hi14</td>
<td>Hi14</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

Display for [100% OF POVERTY GUIDELINE] uses the following conditions:
- If CAREGIVER HHSIZE = 1, set 100% OF POVERTY GUIDELINE to $10,800 and display "$10,800".
- If CAREGIVER HHSIZE = 2, set 100% OF POVERTY GUIDELINE to $14,600 and display "$14,600".
- If CAREGIVER HHSIZE = 3, set 100% OF POVERTY GUIDELINE to $18,300 and display "$18,300".
- If CAREGIVER HHSIZE = 4, set 100% OF POVERTY GUIDELINE to $22,200 and display "$22,200".
- If CAREGIVER HHSIZE = 5, set 100% OF POVERTY GUIDELINE to $25,800 and display "$25,800".
- If CAREGIVER HHSIZE = 6, set 100% OF POVERTY GUIDELINE to $29,500 and display "$29,500".
- If CAREGIVER HHSIZE = 7, set 100% OF POVERTY GUIDELINE to $33,300 and display "$33,300".
- If CAREGIVER HHSIZE = or > 8, set 100% OF POVERTY GUIDELINE to $37,000 and display "$37,000".

**QUESTION TEXT:**
Was it less than or more than $\{100\% \text{ OF POVERTY GUIDELINE}\}$?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>LESS THAN</th>
<th>MORE THAN</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hi14</td>
<td>Hi14</td>
<td>Hi14</td>
<td>Hi14</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

Display for [400% OF POVERTY GUIDELINE] uses the following conditions:
- If CAREGIVER HHSIZE = 1, set 400% OF POVERTY GUIDELINE to $43,200 and display "$43,200".
- If CAREGIVER HHSIZE = 2, set 400% OF POVERTY GUIDELINE to $58,400 and display "$58,400".
- If CAREGIVER HHSIZE = 3, set 400% OF POVERTY GUIDELINE to $73,200 and display "$73,200".
- If CAREGIVER HHSIZE = 4, set 400% OF POVERTY GUIDELINE to $88,800 and display "$88,800".
- If CAREGIVER HHSIZE = 5, set 400% OF POVERTY GUIDELINE to $103,200 and display "$103,200".
- If CAREGIVER HHSIZE = 6, set 400% OF POVERTY GUIDELINE to $118,000 and display "$118,000".
- If CAREGIVER HHSIZE = 7, set 400% OF POVERTY GUIDELINE to $133,200 and display "$133,200".
- If CAREGIVER HHSIZE = or > 8, set 400% OF POVERTY GUIDELINE to $148,000 and display "$148,000".

**QUESTION TEXT:**
Was it less than or more than $\{400\% \text{ OF POVERTY GUIDELINE}\}$?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>LESS THAN</th>
<th>MORE THAN</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hi14</td>
<td>Hi14</td>
<td>Hi14</td>
<td>Hi14</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

Display for [CG PAY FOR MEDS] uses the following conditions:

- If CAREGIVER HHSIZE = 1, set CG PAY FOR MEDS to $1,000 and display "$1,000".
- If CAREGIVER HHSIZE = 2, set CG PAY FOR MEDS to $1,400 and display "$1,400".
- If CAREGIVER HHSIZE = 3, set CG PAY FOR MEDS to $1,800 and display "$1,800".
- If CAREGIVER HHSIZE = 4, set CG PAY FOR MEDS to $2,200 and display "$2,200".
- If CAREGIVER HHSIZE = 5, set CG PAY FOR MEDS to $2,600 and display "$2,600".
- If CAREGIVER HHSIZE = 6, set CG PAY FOR MEDS to $3,000 and display "$3,000".
- If CAREGIVER HHSIZE = 7, set CG PAY FOR MEDS to $3,400 and display "$3,400".
- If CAREGIVER HHSIZE = or > 8, set CG PAY FOR MEDS to $3,800 and display "$3,800".

**QUESTION TEXT:**
Was it less than or more than $\{CG PAY FOR MEDS\}$?
Family members often help each other out financially. In the last year have you used your own money to pay...

RESPONSE
a. {SP}'s medications or medical care?
RESPONSE b. {SP}'s Medicare premiums or copayments or other insurance premiums and copayments?
RESPONSE c. mobility devices for {SP} such as walkers, canes, or wheelchairs?
RESPONSE d. features that made {SP}'s home safer such as a railing or a ramp, grab bars in the bathroom, a seat for the shower or tub, or an emergency call system?
RESPONSE e. any other assistive devices for {SP} that make it easier or safer for [him/her] to do activities or do them on [his/her] own? This includes devices to help [him/her] see, hear, reach, hold things, or pick things up.
RESPONSE f. a paid in-home helper for {SP}?

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 HI14a-f = 2 (NO), RF, or DK, go to HI18.
Otherwise, go to HI15

Altogether last year, would you say you paid more or less than $1,000 for...

RESPONSE
MORE THAN $1,000
LESS THAN $1,000
<table>
<thead>
<tr>
<th>HI16</th>
<th>chitpay2000</th>
<th>C1 HI16 MORE THAN 2000 TO HELP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>QUESTION TEXT:</strong></td>
<td></td>
<td>Was it more than $2,000?</td>
</tr>
<tr>
<td><strong>CODES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>YES</td>
<td>HI18</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>HI18</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td>HI18</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
<td>HI18</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HI17</th>
<th>chitpay500</th>
<th>C1 HI17 LESS THAN 500 TO HELP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>QUESTION TEXT:</strong></td>
<td></td>
<td>Was it less than $500?</td>
</tr>
<tr>
<td><strong>CODES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HI18</th>
<th>chitgiftosp</th>
<th>C1 HI18 FINANCIAL GIFT TO SP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>QUESTION TEXT:</strong></td>
<td></td>
<td>Last year, ending December 31, 2010, did you give any financial help or gifts to {SP}?</td>
</tr>
<tr>
<td><strong>CODES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>YES</td>
<td>HI22</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>HI22</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td>HI22</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
<td>HI22</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HI19</th>
<th>chitgift500</th>
<th>C1 HI19 GFT MOR OR LESS THAN 500</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>QUESTION TEXT:</strong></td>
<td></td>
<td>For the year {CURRENT YEAR-1}, was that more or less than $500?</td>
</tr>
<tr>
<td><strong>CODES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>MORE THAN $500</td>
<td>HI21</td>
</tr>
<tr>
<td>2</td>
<td>LESS THAN $500</td>
<td>HI21</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td>HI22</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
<td>HI22</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HI20</th>
<th>chitgift1000</th>
<th>C1 HI20 GFT TO SP MOR THAN 1000</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>QUESTION TEXT:</strong></td>
<td></td>
<td>Was that more than $1000?</td>
</tr>
<tr>
<td><strong>CODES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>YES</td>
<td>HI22</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>HI22</td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td>HI22</td>
</tr>
<tr>
<td>4</td>
<td>DON'T KNOW</td>
<td>HI22</td>
</tr>
</tbody>
</table>
### HI21 chit1gift100

**C1 HI21 GFT TO SP LESS THAN 100**

**QUESTION TEXT:**

Was that less than $100?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

### HI22 chitfromsp

**C1 HI22 FINANCIAL GIFT FROM SP**

**DISPLAY INSTRUCTIONS:**

Display “Last year” in bold underlined text.

**QUESTION TEXT:**

Last year, ending December 31, 2010, did you receive any financial help or gifts from [SP]?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

### HI23 chitfrsp500

**C1 HI23 GFT FRM SP MOR LESS 500**

**QUESTION TEXT:**

For the year [CURRENT YEAR -1], was that more or less than $500?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MORE THAN $500</td>
</tr>
<tr>
<td>2</td>
<td>LESS THAN $500</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

### HI24 chitfrsp1000

**C1 HI24 GFT FRM SP MORE THN 1000**

**QUESTION TEXT:**

Was that more than $1,000?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

### HI25 chitfrsp100

**C1 HI25 GFT FRM SP LESS THN 100**

**QUESTION TEXT:**

Was that less than $100?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
<tr>
<td></td>
<td>YES</td>
</tr>
<tr>
<td>---</td>
<td>-----------</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>