NHATS Round 1

Section   IS   [INTERVIEW SETUP]   Sequence: 1

IS1   IS1   NOT ON FILE

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

IS2   **is1resptype**   R1 IS2 TYPE OF RESPONDENT

                                 op1proxy   R1 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.

IS2A   **is1reasnprx1**   R1 IS2A PROXY REAS SP DEMENTIA

                                 is1reasnprx2   R1 IS2A PROXY REAS SP ILL

                                 is1reasnprx3   R1 IS2A PRXY REAS SP SPCH IMPAIR

                                 is1reasnprx4   R1 IS2A PRXY REAS SP HEAR IMPAIR

                                 is1reasnprx5   R1 IS2A PROXY REAS LANG BARRIER (from IS2B)

                                 is1reasnprx6   R1 IS2A PROXY REAS TEMP UNAVAIL (from IS2B)

                                 is1reasnprx9   R1 IS2A PROXY REAS OTHER

QUESTION TEXT:

SPECIFY REASON FOR PROXY

SELECT ALL THAT APPLY

CODES   **Code All That Apply**

1	DEMENTIA OR COGNITIVE IMPAIRMENT REPORTED BY PROXY	BOX IS2C
2	SP TOO ILL	BOX IS2C
3	SP SPEECH IMPAIRED	BOX IS2C
4	SP HEARING IMPAIRED	BOX IS2C
91	OTHER (SPECIFY)	

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

IS2B   IS2B   NOT ON FILE

QUESTION TEXT:

SPECIFY REASON FOR PROXY

ENTER TEXT

Length   50

BOX IS2C   BOXIS2C   NOT ON FILE

QUESTION TEXT:

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 UNLESS RESPONDENT TYPE IS CHANGED AT IS2 ON RESTART.

IS2D   IS2D   NOT ON FILE

QUESTION TEXT:

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

PRESS1 AND ENTER TO CONTINUE

IS3   IS3   NOT ON FILE

QUESTION TEXT:

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

SPELL OUT SP'S NAME. CONFIRM SPELLING.

CODE

1	YES	IS4
2	NO	

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.

QUESTION TEXT:

What is the correct spelling of {your/SPs} full name?

{FIRST NAME} {MIDDLE NAME} {LAST NAME}

CORRECT FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length   25

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.

QUESTION TEXT:

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

ENTER TEXT

Length   25

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

QUESTION TEXT:

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

ENTER TEXT

Length   25

PROGRAMMER INSTRUCTIONS:

Write SP name (preloaded or updated spelling if corrected IS3c) as the first entry on the person roster.

IS4   r1dgender   R1 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 IS5.
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

IS5   **r1dbirthmth (Sensitive)**   R1 D BIRTH MONTH OF SP

                       r1dbirthyr (Sensitive)   R1 D BIRTH YEAR OF SP

DISPLAY INSTRUCTIONS:

Display preloaded 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 {your/SP's} birth date is {BIRTH MONTH BIRTH DAY, BIRTH YEAR} ({BIRTH
MM/BIRTH DD/BIRTH YEAR}). Is that correct?

CODES

1	YES	BOX IS8
2	NO	

IS6   **r1dbirthmth(Sensitive)**   R1 D BIRTH MONTH OF SP

                       r1dbirthyr(Sensitive)   R1 D BIRTH YEAR OF SP

QUESTION TEXT:

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

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

PROGRAMMER INSTRUCTIONS:

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 **r1dintvwrage (Sensitive)** R1 D AGE OF SP AT INTERVIEW

r1d2intvrage R1 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

BOX IS8 **BOXIS8** NOT ON FILE

Write SP name, gender, date of birth, and calculated age (from IS7) to the PERSON ROSTER.
Set relationship to SP =1 (SAMPLE PERSON).

If IS2 = 1 (SP), go to Section RE RESIDENCE.
If IS2 = 2 (PROXY), 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 25

PROGRAMMER INSTRUCTIONS:

IS8a, IS8b, and IS8c are displayed on the same screen.

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:

        IS8a, IS8b, and IS8c are displayed on the same screen.

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:

        IS8a and IS8b are displayed on the same screen.

        WRITE PROXY NAME AS SECOND ENTRY ON PERSON ROSTER. SET PROXY RESP FLAG=1 FOR PERSON IDENTIFIED AS PROXY RESPONDENT.

IS9   **is1prxyrelat**   R1 IS9 PROXY RELATIONSHIP TO SP

                      op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

        Do not display response category 1.

        Display PROXY RELATIONSHIP CODE LIST.

QUESTION TEXT:

        How are you related to {SP}?

        IF NEEDED: Are you {hisher}…..?

        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	ROOMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	NOT RELATED

PROGRAMMER INSTRUCTIONS:

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

is1prxygendr   R1 IS10 PROXY GENDER

op1gender   R1 OTHER PERSON GENDER

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

BOXIS11   NOT ON FILE

Write PROXY relationship and gender to PERSON ROSTER.

IS11

is1famrrutin   R1 IS11 FAMILRTY SP DAILY ROUTIN

QUESTION TEXT:

How familiar are you with {SP}'s daily routine? Are 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

PROGRAMMER INSTRUCTIONS

GO TO SECTION RE RESIDENCE

Derived Variables from Items in IS Section	
is1dproxyid	R1 D PROXY OPID
r1d2intvrage	R1 D SP CAT AGE AT INTVW

RE1   **re1resistrct**   R1 RE1 RESIDNCE PHYSICAL STRCTUR

QUESTION TEXT:

CODE PHYSICAL STRUCTURE OF SP'S RESIDENCE

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	RE3
2	SINGLE HOUSE BUT ATTACHED TO OTHERS (ROW HOUSE, TOWNHOUSE, DUPLEX, TRIPLEX, OR TRIPLE DECKER)	RE3
3	MOBILE HOME OR TRAILER	RE3
4	MULTI-UNIT (2+) BUILDING	RE2
91	OTHER (SPECIFY)	RE1a

PROGRAMMER INSTRUCTIONS:

If 1, 2, or 3 is selected set STRUCTURE flag=1 (HOUSE) and use display text of "home"
Else if 4 is selected set STRUCTURE flag=2 (MULTI-UNIT) and use display text of "building"
Else if 91 is selected set 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

RE1a   **RE1a**   NOT ON FILE

QUESTION TEXT:

SELECT TYPE OF STRUCTURE

ENTER TEXT

Length   25

RE2   **re1bldgfl**   R1 RE2 SP BLDG MORE THAN ONE
                                                           FLOOR

QUESTION TEXT:

CODE NUMBER OF FLOORS OF STRUCTURE

CODES

1	BUILDING HAS ONE FLOOR
2	BUILDING HAS MULTIPLE FLOORS

PROGRAMMER INSTRUCTIONS:

>If 1 is selected, set NUMFLOORS flag=1

>If 2 is selected, set NUMFLOORS flag=2

RE3

RE3   NOT ON FILE

QUESTION TEXT:

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

CODES

1	YES	RE5
2	NO	

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.

QUESTION TEXT:

>What is {your/SP's} address?
>
>CONFIRM SPELLING
>
>{Address 1}
>{Address 2}
>{City}, {State} {Zip}

ENTER TEXT

>Length   25

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.

QUESTION TEXT:

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

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   **re1spadrscty (Restricted)**   R1 RE SP ADDRESS CITY

DISPLAY INTRUCTIONS:

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.

QUESTION TEXT:

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

CONFIRM SPELLING

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

ENTER TEXT

Length   25

RE4d   **re1spadrsstt (Restricted)**   R1 RE 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.

QUESTION TEXT:

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

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 of state names

RE4e   **re1spadrszip (Restricted)**   R1 RE SP ADDRESS ZIP CODE

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 {State} fields as lighter, "grayed out" text
Display "zip code" as underlined text.

Display preloaded SP address in the question text.

QUESTION TEXT:

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

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.

RE5   **RE5**   NOT ON FILE

QUESTION TEXT:

Is this {your/SPs} mailing address?

CODES

1	YES	GO TO HC
2	NO	

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   25

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 ADDRESS

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 LOCATE STATE, AND
PRESS ENTER TO SELECT

ENTER TEXT

Length   2

PROGRAMMER INSTRUCTIONS:

Use lookup file of state names

RE6c   **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.

GO TO SECTION HC HEALTH CONDITIONS

Derived Variables from Items in RE Section

re1dcensdiv	R1 D SP CENSUS DIVISION

Flag Variables set in RE Section

fl1structure	R1 F RE STRUCTURE OF SP DWELLING
fl1bldgfl	R1 F RE SP BLDG MORE THAN ONE FLOOR

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   **hc1health**   R1 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   **hc1disescn1**   R1 HC2 SP HAD HEART ATTACK

hc1disescn2   R1 HC2 SP HAS HEART DISEASE

hc1disescn3   R1 HC2 SP HAS HIGH BLOOD PRESS

hc1disescn4   R1 HC2 SP HAS ARTHRITIS

hc1disescn5   R1 HC2 SP HAS OSTEOPOROSIS

hc1disescn6   R1 HC2 SP HAS DIABETES

hc1disescn7   R1 HC2 SP HAS LUNG DISEASE

hc1disescn8   R1 HC2 SP HAD STROKE

hc1disescn9   R1 HC2 SP HAS DEMENTIA OR ALZH

hc1disescn10   R1 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.

QUESTION TEXT:

{[}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
	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

---

BOX HC3   **BOXHC3**   NOT ON FILE

QUESTION TEXT:

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

HC3   **hc1cancerty1**   R1 HC3 SP HAD SKIN CANCER

hc1cancerty2 (Sensitive)   R1 HC3 SP HAD BREAST CANCER

hc1cancerty3 (Sensitive)   R1 HC3 SP HAD PROSTATE CANCER

hc1cancerty4 (Sensitive)   R1 HC3 SP HAD BLADDER CANCER (from HC3b)

hc1cancerty5 (Sensitive)   R1 HC3 SP HAD CRV OVRN UTRN CNCR (from HC3b)

hc1cancerty6 (Sensitive)   R1 HC3 SP HAD COLON CANCER (from HC3b)

hc1cancerty7 (Sensitive)   R1 HC3 SP HAD KIDNEY CANCER (from HC3b)

hc1cancerty8 (Sensitive)   R1 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
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

BOXHC4   BOXHC4   NOT ON FILE

If HC2i = 1 (YES), go to HC4.
Otherwise, go to HC5.

HC4   hc1dementage   R1 HC4 AGE TOLD HAD DEMENTIA

QUESTION TEXT:

How old {were you/was SP} when {you were/{he/she} was} told {you have/{he/she} had} dementia or Alzheimer's disease?

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 "CONFIRMED RESPONSE. AGE ENTERED IS GREATER THAN SP'S CURRENT AGE".

HC5   hc1brokebon1   R1 HC5A SP BROKEN OR FRACT HIP

                   hc1brokebon2   R1 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.

QUESTION TEXT:

{[}Since age 50 has a doctor told {you/SP} that {you have/{he/she} has}{]}

{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.

HC6   hc1serdisill   R1 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   **hc1hosptstay**   R1 HC7 SP HOSP STAY LAST 12MOS

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

{Have you/Has SP} had an overnight hospital stay 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   **hc1hosovrnht**   R1 HC8 SP NUM OF HOSP STAYS

DISPLAY INSTRUCTIONS:

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)? By hospital stay, we mean a time when {you/SP} stayed at least one night in the hospital.

ENTER NUMBER

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

QUESTION TEXT:

Next I have a few questions about any types of surgery {you/SP} may have had.

PRESS 1 AND ENTER TO CONTINUE

HC9A   **hc1kneesurg**   R1 HC9A HAD KNEE SURGERY

DISPLAY INSTRUCTIONS:

Items HC9a-HC13c should be displayed as a grid with four columns in the response area:

1st: Item text
2nd: Yes/no response to surgery (a)
3rd: Yes/no if surgery was in last 12 months (b)
4th: If not in last 12 months, age at last surgery

QUESTION TEXT:

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

Knee repair or replacement?

CODES

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

HC9B **hc1knesrgyr** R1 HC9B KNEE SURGERY IN 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC9C **hc1ageknesur** R1 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 **hc1hipsurg** R1 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   **hc1hipsrgyr**   R1 HC10B HIP SURG IN 12 MNTHS

DISPLAY INSTRUCTIONS:

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	HC11A
2	NO	
	REFUSED	HC11A
	DON'T KNOW	HC11A

HC10C   **hc1agehipsur**   R1 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   **hc1catarsurg**   R1 HC11A 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   hc1catrsrgyr   R1 HC11B CATER SURG IN 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC11C   hc1agecatsur   R1 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   hc1bckspnsur   R1 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:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC12C   hc1agebcksrg   R1 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   hc1heartsurg   R1 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   hc1hartsrgyr   R1 HC13B HEART SURGERY 12 MONTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC13C　　　　　hc1agehrtsrg　　　　R1 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　　　　　hc1fllsinmth　　　　R1 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   **hc1worryfall**   R1 HC15 WORRIED ABOT FALLNG 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   **hc1worrylimt**   R1 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   **hc1faleninyr**   R1 HC17 FALLEN DOWN IN 12 MONTHS

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

In the last 12 months {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   hc1multifall   R1 HC18 FALLEN DWN MORE THN ONCE

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

In the last 12 months, {have you/has SP} fallen down more than one time?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HC19   hc1depresan1   R1 HC19A SP LITTLE INTERST PLEAS

hc1depresan2   R1 HC19B SP DOWN DEPRES HOPELESS

hc1depresan3   R1 HC19C SP NERVOUS ANXIOUS

hc1depresan4   R1 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 hc1aslep30mn R1 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 hc1trbfalbck R1 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?

CODES

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

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

HT1PRE   **HT1PRE**   NOT ON FILE

Now, let's talk about the place {you live/SP lives}.
PRESS 1 AND ENTER TO CONTINUE

HT1   **ht1longlived**   R1 HT1 HOW LONG LIVED THERE

DISPLAY INSTRUCTIONS:

Display preloaded 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 {HOME STREET ADDRESS 1 AND STREET ADDRESS 2 }?

INDICATE RESPONSE UNIT

CODES

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

HT1A   **ht1mthslived**   R1 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   **ht1yrslived**   R1 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   **ht1longer5yr**   R1 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 at {HOME STREET ADDRESS 1 AND STREET ADDRESS 2 } for 5 years or longer?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX HT3   **BOXHT3**   NOT ON FILE

If RE1= 1 (FREE STANDING) or RE1=2 (SINGLE HOME, ATTACHED),
go to HT3. Otherwise, go to HT4

HT3   **ht1placedesc**   R1 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	RELIGIOUS GROUP QUARTERS	BOX HT3b
91	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   **BOXHT3b**   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   **ht1retiresen**   R1 HT4 RETIRMNT CMMTY SEN HOUSIN

DISPLAY INSTRUCTIONS:

If RE1=1 (FREE-STANDING), display "a detached house"
If RE1=2 (SINGLE HOME, BUT ATTACHED), display "a row house, townhouse, or duplex"
If RE1=3 (MOBILE HOME OR TRAILER), display "a mobile home or trailer"
If RE1=4 (A MULTI-UNIT BUILDING), display "a multi-unit building"
If RE1=91 (other) display "TEXT ENTERED IN RE1a"
If HT3=1 (PRIVATE RESIDENCE), display "that is a private residence"
If HT3=2 (GROUP HOME), display "that is a group home"
If HT3=3 (ASSISTED LIVING), display "that is an assisted living facility or CCRC"
If HT3=4 (RELIGIOUS GROUP QUARTERS), display "that is a religious group quarters"
If HT3=91 (OTHER SPECIFY), display "that is a "TEXT ENTERED IN HT3a"

QUESTION TEXT:

> I have recorded that {you live/SP lives} in {a detached house/a row house, townhouse, or duplex/a mobile home or trailer/a multi-unit building/OTHER} {that is {a private residence/a group home/an assisted living facility or CCRC/a religious group quarters/OTHER}}.
>
> Is {your/{his/her}} 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   **BOXHT5**   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 , 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   **ht1diffareun**   R1 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   **ht1helpmedbd**   R1 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   **ht1meals**   R1 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   **BOXHT8**   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   BOXHT9A   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.

HT9B   HT9B   NOT ON FILE

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length   50

PROGRAMMER INSTRUCTIONS:

Text length 50 char
Display FACILITY NAME from HT9b for facility name displays.

HT10   ht1spacename   R1 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 HT 11
4	SUITE	BOX HT 11
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   BOXHT11   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".

If FACILITY flag=1 (YES), go to Section SE – Service Environment
Otherwise, go to Section HH – Household and Family.

Flag variables set in HT Section	
fl1facility	R1 F ROUTING FLAG FROM HT3 5 6 7
fl1hotype	R1 F HT TYPE OF HOME
fl1retirecom	R1 F HT SP LIVES IN RETIREMT COM

BOX SE1PRE   BOXSE1PRE   NOT ON FILE

If (FACILITY flag = 1), 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   BOXSE1   NOT ON FILE

If HT7 = 1 (YES, MEALS OFFERED), code SE1a = 1 (YES) and go to SE1b.
Otherwise, go to SE1a.

SE1

se1servcoff1	R1 SE1 FAC SERVICES MEALS
se1servcoff2	R1 SE1 FAC SERVICES HELP W RX
se1servcoff3	R1 SE1 FAC SERV HELP BATH DRESS
se1servcoff4	R1 SE1 FAC SERVICES LAUNDRY
se1servcoff5	R1 SE1 FAC SERVICES HOUSEKEEP
se1servcoff6	R1 SE1 FAC SERV VAN TO DOCTOR
se1servcoff7	R1 SE1 FAC SRV VAN TO STORE EVNT
se1servcoff8	R1 SE1 FAC SERV RECREATIONAL FAC
se1servcoff9	R1 SE1 FAC SERV SOCIAL EVENTS

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-i]}

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 [8] h. recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [9] i. organized social events and activities?

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.

BOX SE2   BOXSE2   NOT ON FILE

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

SE2

se1servused1	R1 SE2 SERVS USED MEALS
se1servused2	R1 SE2 SERVS USED HELP W RX
se1servused3	R1 SE2 SERVS USED HLP BATH DRESS
se1servused4	R1 SE2 SERVS USED LAUNDRY
se1servused5	R1 SE2 SERVS USED HOUSEKEEPING
se1servused6	R1 SE2 SERVS USED VAN TO DOCTOR
se1servused7	R1 SE2 SERVS USED VAN TO STORE
se1servused8	R1 SE2 SERVS USED RECREATION FAC
se1servused9	R1 SE2 SERVS USED SOCIAL EVENTS

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.

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-i]}

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. recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [9] i. organized social events and activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

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

BOX SE3   **BOXSE3**   NOT ON FILE

In any item at SE2a-i= 1 (YES), go to SE3.
Otherwise, go to Section HH - Household.

SE3

se1payservi1	R1 SE3 PAYMENT FOR SERV MEALS
se1payservi2	R1 SE3 PAYMENT FOR SERV HLP W RX
se1payservi3	R1 SE3 PAY FR SERV HLP BATH DRSS
se1payservi4	R1 SE3 PAYMENT FOR SERV LAUNDRY
se1payservi5	R1 SE3 PAYMNT FOR SERV HOUSEKEEP
se1payservi6	R1 SE3 PAYMNT FR SERV VAN TO DOC
se1payservi7	R1 SE3 PAY FOR SERV VAN TO STORE
se1payservi8	R1 SE3 PAY FOR SERV RECREATION
se1payservi9	R1 SE3 PAY FOR SERV SOCIAL EVNTS

DISPLAY INSTRUCTIONS:

If SE2a = 1 (YES), display SE3a.
If SE2b = 1 (YES), display SE3b.
If SE2c = 1 (YES), display SE3c.
If SE2d = 1 (YES), display SE3d.
If SE2e = 1 (YES), display SE3e.
If SE2f = 1 (YES), display SE3f.
If SE2g = 1 (YES), display SE3g.
If SE2h = 1 (YES), display SE3h.
If SE2i = 1 (YES), display SE3i.

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}} that {you/SP} used in the last month, 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 -i]}

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. recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [9] i. organized social events and activities?

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-i 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

HH1   hh1martlstat   R1 HH1 MARITAL STATUS

DIPLAY 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	HH3
2	LIVING WITH A PARTNER	HH3
3	SEPARATED	BOX HH13
4	DIVORCED	
5	WIDOWED	
6	NEVER MARRIED	BOX HH13
	REFUSED	BOX HH13
	DON'T KNOW	BOX HH13

PROGRAMMER INSTRUCTIONS:

Write Marital Status for SP to PERSON ROSTER.

HH2A   hh1mthendmar (Sensitive)   R1 HH2A MTH MARR END OR SPS PAS[S]

DISPLAY INSTRUCTIONS:

If HH1=4 (DIVORCED), display "{your/SP's} (most recent) marriage end". If
HH1=5 (WIDOWED), display, "{your/SP's} spouse 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 pass away}?

ENTER MONTH

ENTER NUMBER

Range		1 to 12
REFUSED		
DON'T KNOW		

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH2B
hh1yrendmarr   R1 HH2B YR MARR END OR SPS PASS

DISPLAY INSTRUCTIONS:

If HH1=4 (DIVORCED), display "{your/SP's} (most recent) marriage end".
If HH1=5 (WIDOWED), display, "{your/SP's} spouse pass away".
Display "4-digit year" in underlined text.

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	BOX HH13
DON'T KNOW	BOX HH13

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

HH3
hh1yrsmarliv   R1 HH3 YEARS MARR OR LIV TOGTEHR

DISPLAY INSTRUCTIONS:

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and HH1=1 (MARRIED), display "have you, "and {SP}", and "been married".
Else if PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and HH1=2 (LIVING WITH A PARTNER), display "have you", "and {SP}" and "lived together".
Else if PROXY flag=1 (YES) and HH1=1 (MARRIED), display "has {SP}" and "been married".
Else if PROXY flag=1 (YES) and HH1=2 (LIVING WITH A PARTNER), display "have {SP}", "and {his/her} partner", and "lived together".
Else If HH1=1 (MARRIED), display "have you" and "been married".
Else if HH1=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 HH4A   **BOXHH4A**   NOT ON FILE

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), set SPOUSE/PARTNER flag=1 FOR PERSON, and go to HH6a.
Otherwise, go to HH4a.

HH4A   **HH4A**   NOT ON FILE

DISPLAY INSTRUCTIONS:

    If HH1=1 (MARRIED), display "spouse".
    If HH1=2 (LIVING WITH A PARTNER), display "partner".

    Display "FIRST" in bold underlined text.

QUESTION TEXT:

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

ENTER FIRST NAME. CONFIRM SPELLING

ENTER TEXT

    Length   25

PROGRAMMER INSTRUCTIONS:

    HH4a, HH4b, and HH4c are displayed on the same screen.

HH4B   **HH4B**   NOT ON FILE

DISPLAY INSTRUCTIONS:

    Display "MIDDLE" in bold underlined text.

QUESTION TEXT:

[What is {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

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

QUESTION TEXT:

[What is {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 SPOUSE/PARTNER name from HH4 to PERSON ROSTER. Set SPOUSE/PARTNER flag = 1 (YES) for person entered at HH4. Set RELATIONSHIP = 2 (SPOUSE/PARTNER).

HH5

hh1spgender   R1 HH5 GENDER OF SPOUSE

op1gender   R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

If HH1=1 (MARRIED), display "spouse".
If HH1=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.

HH6A

hh1modob (Sensitive)   R1 HH6A MONTH DOB OF SPOUSE

op1birthmth (Sensitive)   R1 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 NUMBER

Range	1 to 12
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH6B   hh1daydob (Restricted)   R1 HH6B DAY DOB OF SPOUSE

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 "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   hh1yrdob (Sensitive)   R1 HH6C YEAR DOB OF SPOUSE

                          op1birthyear (Sensitive)   R1 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   hh1dspousage (Sensitive)   R1 D SPOUSE AGE

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 = in (1 (yes), DK, RF) write PERSON AGE to PERSON ROSTER.

HH8   hh1dspousage (Sensitive)   R1 D SPOUSE AGE

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.

HH9

hh1spouseduc   R1 HH9 HIGHEST EDUC OF SPOUSE

op1leveledu   R1 OP HIGHEST LEVEL EDUCATION

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:

SHOWCARD 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

hh1spoupchlp   R1 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 **hh1livwthspo** R1 HH11 LIVE WITH SPOUSE PARTNER

op1prsninhh R1 OTHER PRSN IN HOUSEHOLD

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 INHOUSEHOLD flag = 1 (YES) for SPOUSE/PARTNER.

HH12 **hh1placekind** R1 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 BOXHH13 NOT ON FILE

If FACILITY flag = 1 (yes), go to Section CS.
Else if If PROXY flag=1 and PROXY RELATIONSHIP=35, go to HH13b.
Else if PROXY flag=1 and PROXY RELATIONSHIP =3-34, 91, or 92, go to HH13a. Otherwise, go to HH13b.

HH13a hh1proxlivsp R1 HH13A PROXY LIVES W SP
op1prsninhh R1 OTHER PRSN IN HOUSEHOLD

QUESTION TEXT:

Do you live here with {SP}?

CODES

1	YES
2	NO

PROGRAMMER INSTRUCTIONS:

If HH13a=1 (YES), set INHOUSEHOLD flag=1 (YES) for PROXY PERSON.

HH13b hh1othlvhere R1 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 INHOUSEHOLD flag for PROXY=1 (YES) and PROXY RELATIONSHIP ‡ 2 (SPOUSE/PARTNER), display "you and SP".
Otherwise, display "{SP}".

IF INHOUSEHOLD 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

2	NO	SECTION CS
	REFUSED	SECTION CS
	DON'T KNOW	SECTION CS

HH14
op1prsninhh   R1 OTHER PRSN IN HOUSEHOLD

DISPLAY INSTRUCTIONS:

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

Display questions HH14-HH19 on full matrix screen.
If INHOUSEHOLD flag = 1 (yes) for PROXY PERSON, display "you and {SP}".
Else if PROXY flag=2 (NO), display "you"
Otherwise, display "{SP}".

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:

{[}Please tell me the names of all of the people who usually live (here) with {you and {SP}/you/{SP}}. Please include people temporarily absent.{]}

PROBE: Is there anyone else living (here) with {you and {SP}/you/{SP}}?

PRESS 1 and ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

Display grid with SP preloaded, and Proxy preloaded if INHOUSEHOLD flag= 1 (YES) for PROXY PERSON.
For each HHMEMBER ROSTER addition, set INHOUSEHOLD flag= 1 (YES).
Allow up to 15 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

HH14A
HH14A   NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text

QUESTION TEXT:

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

CONFIRM SPELLING

PRESS ENTER IF MATRIX IS COMPLETE

ENTER TEXT

Length   25

HH14B

HH14B   NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in underlined text

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length   25

HH15

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

op1childinhh   R1 HH15 CHILD IN HOUSEHOLD

op1gender   R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

Display HOUSEHOLD RELATIONSHIP CODE LIST.

QUESTION TEXT:

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

PRESS F1 FOR HELP SCREEN

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   op1gender   R1 OTHER PERSON GENDER

QUESTION TEXT:

Is {FIRST NAME LAST NAME} male or female?

CODES

1	MALE
2	FEMALE

PROGRAMMER INSTRUCTIONS:

If HH16 = 1, set PERSON GENDER = 1 (male), and display "M" in matrix gender field.
If HH16 = 2, set PERSON GENDER = 2 (female), and display "F" in matrix gender field.

BOX HH17   BOXHH17   NOT ON FILE

If HH15 = 25-36, 91 or 92, set HH17a-c, HH18, and HH19 as NOT REQUIRED and go to HH14a. Otherwise, go to HH17a.

HH17A   op1birthmth (Sensitive)   R1 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 op1birthday (Sensitive) R1 OTHER PERSON DAY OF BIRTH

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 op1birthyear R1 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

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 HH18 NOT ON FILE

QUESTION TEXT:

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

CODES

1	YES	HH14
2	NO	HH17
	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.

HH19

HH19   NOT ON FILE

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

Derived Variables from Items in the HH Section	
hh1dspouseid	R1 D SPOUSE ID
hh1dlvngarrg	R1 D LIVING ARRANGEMENT
hh1dspousage	R1 D SPOUSE AGE
hh1dhshldnum	R1 D TOTAL NUMBER IN HOUSEHOLD
hh1dhshldchd	R1 D TOTAL CHILDREN IN HOUSEHOLD

CS1   cs1dreconcil   R1 D CS1 OP RECORD RECONCILE

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	CS2PRE
2	NO	
	REFUSED	
	DON'T KNOW	

BOX CS2   BOXCS2   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 any roster entries with CHILDINHH flag = 1 (yes), go to CS9PRE.
Otherwise, go to CS14.

CS2PRE   op1chnotinhh   R1 CS2 CHILD NOT IN HOUSEHOLD

DISPLAY INSTRUCTIONS:

Display CHILDREN ROSTER as a grid.

Display questions CS2-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.

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?

ENTER TEXT

Length	25

CS3

op1relatnshp	R1 OTHR PRSN RELATIONSHIP TO SP
op1gender	R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

Display CHILD RELATIONSHIP CODE LIST.

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

PROGRAMMER INSTRUCTIONS:

If CS3 = 3 (daughter) or 7 (stepdaughter), set PERSON GENDER = 2 (female), and display "F" in matrix gender field.
ELSE set PERSON GENDER = 1 (male), and display "M" in matrix gender field.

CS4A

op1birthmth (Sensitive)	R1 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

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	

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

op1birthyear (Sensitive)   R1 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

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

op1age (Sensitive)   R1 OTHER PERSON AGE

op1dage   R1 D OTH PERSN CAT AGE AT INTVW

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.

CS6 op1age (Sensitive) R1 OTHER PERSON AGE
 op1dage R1 D OTH PERSN CAT AGE AT INTVW

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:

Write PERSON AGE to PERSON ROSTER.
If CS6 = DK or RF, display "DK" or "RF" in matrix age field.

CS7A op1cityres (Restricted) R1 OTHER PRSN 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 op1stateres (Restricted) R1 OTHER PRSN 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 STATE

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

ENTER TEXT
>   REFUSED
>   DON'T KNOW

PROGRAMMER INSTRUCTIONS:
> Use lookup file of state names.
> Write PERSON CITY and STATE to PERSON ROSTER.
> Go to CS2.

CS8   CS8   NOT ON FILE

QUESTION TEXT:

> IS THE CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS2

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   op1leveledu   R1 OP HIGHEST LEVEL EDUCATION

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 CHILDINHH flag = 1 (yes) or CHILDNOTINHH flag = 1 (yes) preloaded.

Allow movement between grid items using the arrow keys.

When exiting matrix, if any blank fields in matrix CS2-CS7b, or matrix CS9-CS12, return cursor to the blank field and display appropriate error message.

Go to CS13 when matrix is complete.

Write education level to PERSON ROSTER.

Display the following in the matrix education field for CS9 response values: 1: "NONE", 2: "PRE-8TH", 3: "9TH-12TH", 4: "HS GRAD", 5: "VOC/TECH", 6: "SOME COLL", 7: "AA", 8: "BA", 9: "POSTGRAD", DK: "DK", RF: "RF".

CS10   op1martlstat   R1 OTHER PERSON MARITAL STATUS

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   op1numchldrn   R1 OTHER PRSN NUMBER OF CHILDREN

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   op1anychdu18   R1 OTH PRS ANY CHILDREN UNDER 18

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   op1numchdu18   R1 OTH PR NUMBER OF CHILDREN U18

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.

CS13   CS13   NOT ON FILE

QUESTION TEXT:

IS THE CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS2

CS14   cs1sistrsnum   R1 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.

CS15   cs1brthrsnum   R1 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.

Go to Section SN – Social Network.

Derived Variables from Items in CS Section	
op1dage	R1 D OTH PERSN CAT AGE AT INTVW
cs1dnumchild	R1 D NUMBER OF CHILDREN
cs1dnmstpchd	R1 D NUMBER OF STEP CHILDREN
cs1dnumdaugh	R1 D NUMBER OF DAUGHTERS
cs1dnumson	R1 D NUMBER OF SONS
cs1dreconcil	R1 D CS1 OP RECORD RECONCILE

BOX SN1   **BOXSN1**   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   **op1soclntwrk**   R1 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/S TO ADD A PERSON

PROGRAMMER INSTRUCTIONS:

Allow up to 5 selections to PERSON ROSTER. SET SOCIAL NETWORK ORDER flag 1-5 in order selected/added.

Display "CTRL/S" in red bolded font.

If "SP HAS NO ONE TO TALK TO" is selected, disallow other roster entries or selections and go to Section HO – Home Environment.

If "SP HAS NO ONE TO TALK TO" is selected, set NOONETOTALKTO flag = 1 (yes).

If no additions to 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).

SN3　　　　　　　　　**SN3**　　　　　　　　　NOT ON FILE

DISPLAY INSTRUCTIONS:

Display SN3 and SN4 on same page.

Display "first" as underline text.

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length　　　　　　　　　　　　　　　　　　　25

SN4　　　　　　　　　**SN4**　　　　　　　　　NOT ON FILE

DISPLAY INSTRUCTIONS:

Display SN3 and SN4 on same page.

Display "last" as underlined text.

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length　　　　　　　　　　　　　　　　　　　25

SN5　　　　　　　　**op1relatnshp**　　　　　R1 OTHR PRSN RELATIONSHIP TO SP
　　　　　　　　　　　　op1gender　　　　　　R1 OTHER PERSON GENDER

QUESTION TEXT:

[What is {FIRSTNAME LASTNAME}'s relationship to you?]

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-WIFE/EX-HUSBAND
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

PROGRAMER INSTRUCTIONS:

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) and display SN7-SN8b for each.

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) and display SN7-SN8b for each.

Otherwise, display SN6-SN8b for each.

NOTE: persons with relationship codes 2,3 and 4 will have been written to the roster in HH and CS.

SN6   **op1gender**   R1 OTHER PERSON GENDER

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.

SN7   **op1catgryage (Sensitive)**   R1 OTH PERSN SN CAT AGE

op1dcatgryag   R1 D OTH PERSN SN CAT AGE

QUESTION TEXT:

How old is {FIRST NAME LAST NAME}?

CODES

1	UNDER 20
2	20-24
3	25-29
4	30-34
5	35-39
6	40-44
7	45-49
8	50-54
9	55-59
10	60-65
11	66-69
12	70-74
13	75-79
14	80-85
15	86-89
16	90-94
17	95-99
18	100+
	REFUSED
	DON'T KNOW

PROGRAMER INSTRUCTIONS:

Write PERSON CATEGORICAL AGE to PERSON ROSTER.

SN8A   **op1cityres (Restricted)**   R1 OTHR PRSN 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   **op1stateres (Restricted)**   R1 OTHR PRSN STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display SN8a and 8b 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 of state names
Display state name response label.

Write PERSON CITY and STATE to PERSON ROSTER.

Go to Section HO – Home Environment.

Derived Variables from Items in the SN Section	
sn1dnumsn	R1 D NUMBER IN SOCIAL NETWORK
op1dcatgryag	R1 D OTH PERSN SN CAT AGE
op1dsocwrkfl	R1 D LIKELY SOCIAL NETWRK MEMBER

Flag variables set in SN Section	
fl1noonetalk	R1 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   ho1entrstair   R1 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   BOXHO2   NOT ON FILE

> If STRUCTURE flag = 2 (multi-unit), go to HO2.
> ELSE, go to HO3.

HO2   ho1entrccomn   R1 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 **ho1entrnramp** R1 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 **BOXHO4** NOT ON FILE

> If STRUCTURE flag = 2 (multi-unit) and RE2= 2 (multiple floors), then go to HO4, variable text [a].
>
> If STRUCTURE flag = 2 (multi-unit) and RE2=1 (single floor), then go to HO4, variable text [c].
>
> Otherwise, go to BOX HO5.

HO4 **ho1bldgamen1** R1 HO4A BUILDING HAS ELEVATOR

  ho1bldgamen2 R1 HO4B BUILDNG STAIR LIFT GLIDE

  ho1bldgamen3 R1 HO4C BUILD COMMN SPACE MEALS

  ho1bldgamen4 R1 HO4D BUILD SPACE SOCIAL EVENT

DISPLAY INSTRUCTIONS:

> If at HO4a do not display brackets in question text.
> If at HO4c and RE2 = 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   **BOXHO5**   NOT ON FILE

> If STRUCTURE flag = 2 (multi-unit) or RE1 = 3 (mobile home), go to HO10PRE.
>
> Otherwise, go to HO5.

HO5   **ho1levelsflr**   R1 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   **ho1homeamen1**   R1 Ho8A BED KITCHN BATH SAME FLR

          ho1homeamen2   R1 Ho8B HOME HAS ELEVATOR

          ho1homeamen3   R1 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-c 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}.

PRESS 1 AND ENTER TO CONTINUE

BOX HO10
BOXHO10 NOT ON FILE

If FACILITY flag = 1, go to HO10.
Otherwise, go to HO11.

HO10
ho1bathprivt R1 H010 PRIVATE 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

ho1bathamen1	R1 H011A BATH HAS BATHTUB
ho1bathamen2	R1 H011B BATH HAS SHOWER STALL
ho1bathamen3	R1 H011C BATH GRAB BAR IN SHOWER
ho1bathamen4	R1 H011D BATH SEAT FR SHOWER TUB
ho1bathamen5	R1 H011E BATH RAISED TOILET SEAT
ho1bathamen6	R1 H011F BATH GRAB BARS TOILET
ho1bathamen7	R1 H011G 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 **BOXHO12** NOT ON FILE

> IF FACILITY FLAG = 1 (YES), GO TO HO12.
> ELSE GO TO HO14.

HO12 **ho1kitchnprv** R1 HO12 PRIVATE 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	
2	NO	HO14
	REFUSED	
	DON'T KNOW	

HO13 **ho1kitchncom** R1 H013 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 **ho1microwave** R1 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
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section EM – Environmental Modifications.

Flag variables set in HO Section	
fl1onefloor	R1 F HO SP LIVES ON ONE FLOOR
fl1bathgrbbr	R1 F HO SPS BATH HAS GRAB BARS
fl1bathseat	R1 F HO SPS BATH HAS SEAT
fl1raisedtlt	R1 F HO SP HAS RAISED TOILET
fl1tltgrbbr	R1 F HO SP TOLIET HAS GRAB BARS

BOX EM1   BOXEM1   NOT ON FILE

> 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   em1modhere1   R1 EM1 ENVIRON MODS HERE OR ADD

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

EM2

em1addlstyr1	R1 EM2A RAMP ADDED IN LAST YR
em1addlstyr2	R1 EM2B ELEVATOR ADDED IN LST YR
em1addlstyr3	R1 EM2C STR LIFT ADDED IN LST YR
em1addlstyr4	R1 EM2D SHWR GRABBAR ADD LST YR
em1addlstyr5	R1 EM2E BATHSEAT ADDED IN LST YR
em1addlstyr6	R1 EM2F TOILETSEAT ADD IN LST YR
em1addlstyr7	R1 EM2G TOILET GRABBARS 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 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 HO11c=1 (YES), display RESPONSE [4] and variable text {d}

If HO11d=1 (YES), display RESPONSE [5] and variable text {e}

If HO11e=1 (YES), display RESPONSE [6] and variable text {f}

If HO11f=1 (YES), display RESPONSE [7] and variable text {g}

Display "in the last year" in bold underlined text.

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}. In the last year, did {you/SP} add the{[}

{variable text [a-g]}

{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   **BOXEM3**   NOT ON FILE

If EM2 a-g = 2 (NO), go to EM4.
Otherwise, go to EM3.

EM3   **em1payyufam1**   R1 EM3A SP PAID FOR RAMP

                        em1payyufam2   R1 EM3B SP PAID FOR ELEVATOR

                        em1payyufam3   R1 EM3C SP PAID STAIR LFT GLIDE

                        em1payyufam4   R1 EM3D SP PAID SHOWER GRABBAR

                        em1payyufam5   R1 EM3E SP PAID SHOWER SEAT

                        em1payyufam6   R1 EM3F SP PAID RAISD TOILT SEAT

                        em1payyufam7   R1 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{]}

{variable text [a-g]}

{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

em1paydevce1	R1 EM4A SP PAID FOR VISION AIDS
em1paydevce2	R1 EM4B SP PAID FOR HEARING AID
em1paydevce3	R1 EM4C SP PAID FOR CANE
em1paydevce4	R1 EM4D SP PAID FOR WALKER
em1paydevce5	R1 EM4E SP PAID FOR WHEELCHAIR
em1paydevce6	R1 EM4F SP PAID FOR SCOOTER
em1paydevce7	R1 EM4G SP PAID FOR GRABBER
em1paydevce8	R1 EM4H SP PD SPECIAL DRESS ITM
em1paydevce9	R1 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.

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, 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.

BOX EM5   **BOXEM5**   NOT ON FILE

If EM3a-g=1 (YES) or any of EM4a-i = 1 (YES), go to EM5.
Otherwise, go to Section CM-Community

EM5   **em1payaltgth**   R1 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.

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, about how much was that altogether? Was it more than $500, less than $500, or just about $500?

CODES

1	MORE THAN $500	
2	LESS THAN $500	EM7
3	JUST ABOUT $500	Section CM
	REFUSED	Section CM
	DON'T KNOW	Section CM

EM6 **em1morls1000**

QUESTION TEXT:

Was it more than $1,000, 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 **em1morls100**

QUESTION TEXT:

Was it more than $100, less than $100, or just about $100?

CODES

1	MORE THAN $100
2	LESS THAN $100
3	JUST ABOUT $100
	REFUSED
	DON'T KNOW

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   cm1knowwell   R1 CM1 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   cm1willnghlp   R1 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

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 SECFTION TE – TECHNOLOGICAL ENVIRONMENT

TE1PRE   TE1PRE   NOT ON FILE

> 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   te1cellphone   R1 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   te1othrphone   R1 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   te1computer   R1 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	TE9
2	NO	
7	YES, DOESN'T KNOW HOW TO USE A COMPUTER	BOX TE9
	REFUSED	
	DON'T KNOW	

TE8   te1compoth   R1 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

BOX TE9   BOX TE9   NOT ON FILE

If TE1 = 2 (NO CELL PHONE) and TE6 = 2 (NO COMPUTER) and TE8 = 2 (NO COMPUTER USE ELSEWHERE), go to Section MD – Mobility Devices.
If TE1 = 2 (NO CELL PHONE) and TE6 = 7 (DOESN'T KNOW HOW TO USE COMPUTER), go to Section MD – Mobility Devices.
Otherwise, go to TE9.

TE9   te1emailtext   R1 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 **te1oftnemail** R1 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 **te1online** R1 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 **te1shoponli1** R1 TE12A INTERNET SHOP GROCERY

te1shoponli2 R1 TE12B INTERNET BANKING

te1shoponli3 R1 TE12C INTERNET ORDR REFLL RX

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-c]}

RESPONSE [1] a. shop for groceries or personal items?
RESPONSE [2] b. pay bills or do banking?
RESPONSE [3] c. order or refill prescriptions?

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.

TE13

te1intrntmd1	R1 TE13A INTERNET MEDICAL PROVDR
te1intrntmd2	R1 TE13B INTERNET INSURANCE INFO
te1intrntmd3	R1 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 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.

MD1PRE   **MD1PRE**   NOT ON FILE

> The next questions are about items that {you/SP} may use to help {you/him/her} get around more easily, safely, or on {your/his/her} own.
>
> PRESS 1 AND ENTER TO CONTINUE

MD1   **md1canewlker**   R1 MD1 USED CANE WALKER WHLCHAIR

QUESTION TEXT:

> In the last month, {have you/has SP} used a cane, walker, wheelchair, or scooter, yes or no?
>
> PRESS F1 FOR HELP SCREEN

CODES

1	YES	
2	NO	Section SS
	REFUSED	Section SS
	DON'T KNOW	Section SS

MD2   **md1cane**   R1 MD2 USED A CANE

QUESTION TEXT:

> In the last month, 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   **md1walker**   R1 MD3 USED A WALKER

QUESTION TEXT:

> [In the last month, 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   **md1wheelchar**   R1 MD4 USED A WHEELCHAIR

DISPLAY INSTRUCTIONS:

Display image of wheelchair.

QUESTION TEXT:

SHOW CARD MD1

[In the last month, did {you/SP} use]

a wheelchair?

IF NEEDED: This includes manual, power, electric, or motorized wheelchairs.

CODES

1	YES	
2	NO	MD5
	REFUSED	MD5
	DON'T KNOW	MD5

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set WHEELCHAIR flag = 1 (yes).

MD4a   **md1whelcrspc**   R1 MD4A WHELCHAIR 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   md1scooter   R1 MD5 USE A SCOOTER

DISPLAY INSTRUCTIONS:

Display image of scooter.

QUESTION TEXT:

SHOW CARD MD2

[In the last month, did {you/SP} use]

a scooter?

IF NEEDED: This includes electric or power scooters that are used for travel.

CODES

1	YES	
2	NO	Section SS
	REFUSED	Section SS
	DON'T KNOW	Section SS

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.

MD5a   md1scterinsp   R1 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

fl1cane	R1 F MD SP USES CANE
fl1walker	R1 F MD SP USES WALKER
fl1wheelchr	R1 F MD SP USES WHEELCHAIR
fl1whlchrhom	R1 F MD SP HAS WHEELCHR AT HOME
fl1scooter	R1 F MD SP USES SCOOTER
fl1scooterhm	R1 F MD SP HAS SCOOTER AT HOME

SS3PRE   SS3PRE   NOT ON FILE

> Now let's talk about how well {you hear/SP hears}.
>
> PRESS 1 AND ENTER TO CONTINUE

SS3   ss1heringaid   R1 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	

SS4a   ss1hearphone   R1 SS4A SP CAN USE TELEPHONE

DISPLAY INSTRUCTIONS:

> 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}…"
>
> FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

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   ss1convwradi   R1 SS4B CONVERSATIN WTH TV RADIO

DISPLAY INSTRUCTIONS:

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}..."

FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

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　　　　　ss1convquiet　　　　　R1 SS4C CONVERS IN QUIET ROOM

DISPLAY INSTRUCTIONS:

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}..."

FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

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　　　　　ss1glasseswr　　　　　R1 SS7 WEARS GLASSES CONTCTS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "at a distance" IN BOLD UNDERLINED 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	

SS8a   **ss1seewellst**   R1 SS8A SEES ACROSS THE STREET

DISPLAY INSTRUCTIONS:

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}…"

FOR ITEMS SS8a AND SS8b, USE "SAME QUESTION STEM" DISPLAY

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   **ss1seestvgls**   R1 SS8B TV ACROSS ROOM W GLASSES

DISPLAY INSTRUCTIONS:

IF SS7=1 (GLASSES OR CONTACTS FOR DISTANCE), DISPLAY "When {you use/SP uses} glasses or contacts, {do you/does {he/she}}…"

ELSE DISPLAY "{Do you/Does SP}…"

FOR ITEMS SS8a AND SS8b, USE "SAME QUESTION STEM" DISPLAY

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   **ss1glasscls**   R1 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   **ss1othvisaid**   R1 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   **ss1glrednewp**   R1 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 NE 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

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   ss1probchswl   R1 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   ss1probspeak   R1 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   ss1painbothr   R1 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   ss1painlimts   R1 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   ss1painmedof   R1 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?

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

BOX SS18B   BOXSS18B   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

	ss1painwhe1	R1 SS18B BACK PAIN IN LAST MNTH
	ss1painwhe2	R1 SS18B HIP PAIN IN LAST MONTH
	ss1painwhe3	R1 SS18B KNEE PAIN IN LAST MNTH
	ss1painwhe4	R1 SS18B FOOT PAIN IN LAST MNTH

---

ss1painwhe5	R1 SS18B HAND PAIN IN LAST MNTH
ss1painwhe6	R1 SS18B WRIST PAIN IN LAST MNTH
ss1painwhe7	R1 SS18B SHOULDR PAIN LST MNTH
ss1painwhe8	R1 SS18B HEAD PAIN IN LAST MNTH
ss1painwhe9	R1 SS18B NECK PAIN IN LAST MNTH
ss1painwhe10	R1 SS18B ARM PAIN IN LAST MNTH (from SS18c)
ss1painwhe11	R1 SS18B LEG PAIN IN LAST MNTH (from SS18c)
ss1painwhe12	R1 SS18B STOMACH PAIN LAST MNTH (from SS18c)
ss1painwhe13	R1 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.

SELECT ALL THAT APPLY

CODES

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
91	OTHER PLACES (SPECIFY)	

SS18C

| SS18C | NOT ON FILE |

QUESTION TEXT:

SPECIFY OTHER PLACES SP HAD PAIN

ENTER TEXT

| Length | 50 |

SS19

| ss1probbreat | R1 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   ss1prbbrlimt   R1 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   ss1strnglmup   R1 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   ss1uplimtact   R1 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   ss1lwrbodstr   R1 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   ss1lwrbodimp   R1 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   ss1lowenergy   R1 SS25 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   ss1loenlmtat   R1 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   ss1prbbalcrd   R1 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   ss1prbbalcnt   R1 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

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 IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL 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

pc1walk6blks   R1 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 IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL 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

pc1walk3blks   R1 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 IS NULL, DISPLAY "cane"

ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL 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   pc1up20stair   R1 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   pc1up10stair   R1 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   pc1car20pnds   R1 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 IS NULL, DISPLAY "cane"
>   ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
>   ELSE IF CANE FLAG IS NULL 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   **pc1car10pnds**   R1 PC6 ABLE TO CARRY 10 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.

>   DISPLAY TEXT "able" and "10 pound" AS BOLD UNDERLINED TEXT.

>   IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"
>   ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
>   ELSE IF CANE FLAG IS NULL 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   **pc1geonknees**   R1 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   **pc1bendover**   R1 PC8 ABLE TO BEND OVER

DISPLAY INSTRUCTIONS:

  DISPLAY QUESTION TEXT "able" AS BOLD UNDERLINED TEXT

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   **pc1hvobovrhd**   R1 PC9 HEAVY OBJECT ABOVE HEAD

DISPLAY INSTRUCTIONS:

  DISPLAY TEXT "able" IN BOLD UNDERLINED TEXT

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   **pc1rechovrhd**   R1 PC10 ABLE TO REACH OVERHEAD

DISPLAY INSTRUCTIONS:

  DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT

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   **pc1opnjarwhd**   R1 PC11 OPEN SEALED JAR W HANDS

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT

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   **pc1grspsmobj**   R1 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 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   **cp1memrygood**   R1 CP1 HOW GOOD MEMRY AT PRESNT

DISPLAY INSTRUCTIONS:

> DISPLAY "at the present time" IN BOLD UNDERLINED TEXT.

QUESTION TEXT:

> First, how would you rate {SP's} 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 CP2   BOXCP2   NOT ON FILE

> If IS9 = 30-37, or 92 (proxy is not a relative), go to CP2.
> Otherwise, go to CP3PRE.

CP2   **cp1knownspyr**   R1 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 and memory problems.

PRESS 1 AND ENTER TO CONTINUE

CP3

cp1chgthink1	R1 CP3A SP DIFF REMEMBER DATE
cp1chgthink2	R1 CP3B SP REPEATS SELF
cp1chgthink3	R1 CP3C SP DIFF REMEMBER APPT
cp1chgthink4	R1 CP3D SP CHNG INTRST ACT HOB
cp1chgthink5	R1 CP3E SP DIFF WITH MONEY MGMT
cp1chgthink6	R1 CP3F SP DIFF LEARNG USE TOOL
cp1chgthink7	R1 CP3G SP PRBLMS WITH JDGMNT
cp1chgthink8	R1 CP3H SP DLY PRBLMS W THNK MEM

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, 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 and memory problems, please say "Yes". Otherwise say "No".{]}

The {first/next/last} item is [READ ITEM].

{variable text [a-h]}

IF NEEDED: Has there been a change caused by {his/her} thinking and memory problems in {RESPONSE ITEM a-h}?

RESPONSE [1] a. remembering the month or year
RESPONSE [2] b. repeating questions, stories, or statements
RESPONSE [3] c. difficulty remembering appointments
RESPONSE [4] d. interest in hobbies or activities
RESPONSE [5] e. difficulty handling money matters like balancing a checkbook or paying bills
RESPONSE [6] f. 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 gifts that are inappropriate for the recipient
RESPONSE [8] h. daily problems with thinking and/or memory

CODES

1	YES, A CHANGE
2	NO, NO CHANGE
3	DEMENTIA/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

cp1memcogpr1   R1 CP4A LOST IN FAMILIAR ENVIRON

cp1memcogpr2   R1 CP4B SP WANDERD OFF NO RETRN

cp1memcogpr3   R1 CP4C SP ABLE LEFT ALONE 1 HR

cp1memcogpr4   R1 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)

BOX CG1PRE **BOXCG1PRE** 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 **cg1speaktosp** R1 CG1A MAY 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 **cg1quesremem** R1 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 **cg1reascan01** R1 CG1D SP CANT ANS DEMENTIA

cg1reascan02 R1 CG1D SP CANT ANS UNABLE SPEAK

cg1reascan03 R1 CG1D SP CANT ANS UNABLE HEAR

cg1reascan04	R1 CG1D SP CANT ANS SP REFUSED
cg1reascan05	R1 CG1D SP CANT ANS PROXY REFUSD
cg1reascan06	R1 CG1D SP CANT ANS NOT PRESENT (from CG1e)
cg1reascan07	R1 CG1D SP CANT ANS SP TOO ILL (from CG1e)
cg1reascan08	R1 CG1D SP CANT ANS LANG BARRIER (from CG1e)
cg1reascan09	R1 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
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　　　　cg1ratememry　　　　R1 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   **BOXCG3**   NOT ON FILE

If CG2=1 (excellent) or 2 (very good)), go to CG4.
Otherwise, go to CG3.

CG3   **cg1ofmemprob**   R1 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	SOME DAYS (2-4 DAYS A WEEK)
4	RARELY (ONCE A WEEK OR LESS)
5	NEVER
	REFUSED
	DON'T KNOW

CG4   **cg1memcom1yr**   R1 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

cg1todaydat1	R1 CG6A TODAY'S DATE CORRCT MNTH
cg1todaydat2	R1 CG6B TODAY'S DATE CORRECT DAY
cg1todaydat3	R1 CG6C TODAY'S DATE CORRECT YR
cg1todaydat4	R1 CG6D TODAY'S DATE CORRCT DOW
cg1todaydat5	R1 CG6E TODAY'S DATE SP USED AID

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 CG6d, display "IF SP DID NOT ALREADY MENTION DAY OF THE WEEK, ASK: What is the day of the week?".

Display "MONTH", "DAY", "YEAR", and "DAY OF THE WEEK" in underlined text.

QUESTION TEXT:

{[]}Without looking at a calendar or watch, please tell me today's date.{[]}

{IF SP DID NOT ALREADY MENTION DAY OF THE WEEK, ASK: What is the day of the week?}

TODAY'S DATE IS: {DAY OF WEEK}, {MONTH DAY,YEAR} {(mm/dd/yyyy)}

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 SAY THE CORRECT DAY OF THE WEEK?
RESPONSE [5] e. 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 [5]e.

BOX CG7

BOXCG7 NOT ON FILE

If PROXY flag =1 and CG6a-CG6e=2(NO/DON'T KNOW) or REFUSED, go Section MO Mobility.
Otherwise, go to CG7PRE.

CG7PRE

cg1prewrdrcl R1 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   **cg1dwrdlstnm**   R1 D WHCH WORD LIST WAS ASSIGNED

DISPLAY INSTRUCTIONS:

If WORD RECALL LIST 1ST ADMIN = 1 (from preload), display words from word list 1.
Else if WORD RECALL LIST 1ST ADMIN = 2(from preload), display words from word list 2.
Else if WORD RECALL LIST 1ST 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

AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE.

CG8

cg1wrdsrcal1	R1 CG8 1 TELL WORDS U CAN RECALL	
cg1wrdsrcal2	R1 CG8 2 TELL WORDS U CAN RECALL	
cg1wrdsrcal3	R1 CG8 3 TELL WORDS U CAN RECALL	
cg1wrdsrcal4	R1 CG8 4 TELL WORDS U CAN RECALL	
cg1wrdsrcal5	R1 CG8 5 TELL WORDS U CAN RECALL	
cg1wrdsrcal6	R1 CG8 6 TELL WORDS U CAN RECALL	
cg1wrdsrcal7	R1 CG8 7 TELL WORDS U CAN RECALL	
cg1wrdsrcal8	R1 CG8 8 TELL WORDS U CAN RECALL	
cg1wrdsrcal9	R1 CG8 9 TELL WORDS U CAN RECALL	
cg1wrdsrca10	R1 CG8 10 TELLWORDS U CAN RECALL	
cg1dwrdimmrc	R1 D SCORE IMMEDIATE WORD RECALL	
cg1dwrdinone	R1 D IMMEDIATE RECALL NONE	
cg1dwrdirref	R1 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
cg1wrdsntlst   R1 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
cg1numnotlst   R1 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

cg1probreca1	R1 CG9 SP HAD DIFF HEARING WORDS
cg1probreca2	R1 CG9 INTERRUPTION AS LIST READ
cg1probreca3	R1 CG9 PROB WORD RECALL SPECIFY
cg1probreca4	R1 CG9 WD RECALL NO PROB OCCURRD

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

PROGRAMMER INSTRUCTIONS:

Response code 92 cannot be selected in combination with any other code. Display error message "INCONSISTENT ANSWER. NO PROBLEMS OCCURRED CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

CG9A   CG9A   NOT ON FILE

QUESTION TEXT:

SPECIFY THE TYPE OF PROBLEM EXPERIENCED DURING WORD RECALL TASK

ENTER TEXT

Length   255

CG10

cg1dclkdraw	R1 D SCORE OF CLOCK DRAWING TEST
cg1dclkimgcl	R1 D IMAGE CLARITY CLOCK DRAWING

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 pas 11)."

START STOPWATCH

STOP ACTIVITY WHEN 2 MINS IS UP OR BEFORE IF SP SAYS DONE

PRESS 1 AND ENTER TO CONTINUE

CG10A   cg1atdrwclck   R1 CG10A SP ATTEMPT CLOCK DRAWIG

QUESTION TEXT:

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

cg1presidna1	R1 CG13A PRES LAST NAME CORRECT
cg1presidna2	R1 CG13B PRES LAST NAME INCORRCT
cg1presidna3	R1 CG13C PRES FIRST NAME CORRCT
cg1presidna4	R1 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   **Code All That Apply**

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

cg1vpname1	R1 CG14A VP LAST NAME CORRECT
cg1vpname2	R1 CG14B VP LAST NAME INCORRECT
cg1vpname3	R1 CG14C VP FIRST NAME CORRECT
cg1vpname4	R1 CG14D VP FIRST NAME INCORRECT

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   **Code All That Apply**
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   BOXCG15   NOT ON FILE

IF CG7PRE = 2 (SP REFUSES ACTIVITY), GO TO SECTION MO - MOBILITY
ELSE GO TO CG15

CG15

cg1wrdsdcal1	R1 CG15 1 DELAYED WORD RECALL
cg1wrdsdcal2	R1 CG15 2 DELAYED WORD RECALL

cg1wrdsdcal3	R1 CG15 3 DELAYED WORD RECALL
cg1wrdsdcal4	R1 CG15 4 DELAYED WORD RECALL
cg1wrdsdcal5	R1 CG15 5 DELAYED WORD RECALL
cg1wrdsdcal6	R1 CG15 6 DELAYED WORD RECALL
cg1wrdsdcal7	R1 CG15 7 DELAYED WORD RECALL
cg1wrdsdcal8	R1 CG15 8 DELAYED WORD RECALL
cg1wrdsdcal9	R1 CG15 9 DELAYED WORD RECALL
cg1wrdsdca10	R1 CG15 10 DELAYED WORD RECALL
cg1dwrddlyrc	R1 D SCORE DELAYED WORD RECALL
cg1dwrddnone	R1 D DELAYED RECALL NONE
cg1dwrddrref	R1 D DELAYED RECALL REFUSED

DISPLAY INSTRUCTIONS:

Display word list that was presented in CG7.

Display response codes 91 and 92 response categories in 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.

If response 91 or 92 given, go to Section MO- Mobility.

CG15a   CG15a   NOT ON FILE

AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE.

CG16   **cg1wrdnotlst**   R1 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   **cg1numwrdnot**   R1 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

cg1dwrd1rcl	R1 D WORD1 IMMEDIATE RECALL
cg1dwrd2rcl	R1 D WORD2 IMMEDIATE RECALL
cg1dwrd3rcl	R1 D WORD3 IMMEDIATE RECALL
cg1dwrd4rcl	R1 D WORD4 IMMEDIATE RECALL
cg1dwrd5rcl	R1 D WORD5 IMMEDIATE RECALL
cg1dwrd6rcl	R1 D WORD6 IMMEDIATE RECALL
cg1dwrd7rcl	R1 D WORD7 IMMEDIATE RECALL
cg1dwrd8rcl	R1 D WORD8 IMMEDIATE RECALL
cg1dwrd9rcl	R1 D WORD9 IMMEDIATE RECALL
cg1dwrd10rcl	R1 D WORD10 IMMEDIATE RECALL
cg1dwrdunnrc	R1 D WORD1 DELAYED RECALL [See CG8]
cg1dwrdinone	R1 D IMMEDIATE RECALL NONE [See CG8]
cg1dwrdirref	R1 D IMMEDIATE RECALL REFUSED [See CG8]
cg1dwrd1dly	R1 WORD1 DELAYED RECALL
cg1dwrd2dly	R1 D WORD3 DELAYED RECALL
cg1dwrd3dly	R1 D WORD4 DELAYED RECALL
cg1dwrd4dly	R1 D WORD5 DELAYED RECALL
cg1dwrd5dly	R1 D WORD6 DELAYED RECALL
cg1dwrd6dly	R1 D WORD7 DELAYED RECALL
cg1dwrd7dly	R1 D WORD8 DELAYED RECALL
cg1dwrd8dly	R1 D WORD9 DELAYED RECALL
cg1dwrd9dly	R1 D WORD10 DELAYED RECALL
cg1dwrd10dly	R1 D WORD2 DELAYED RECALL
cg1dwrddlyre	R1 D SCORE DELAYED WORD RECALL [See CG15]
cg1dwrddnone	R1 D DELAYED RECALL NONE [See CG15]
cg1dwrddrref	R1 D DELAYED RECALL REFUSED [See CG15]

MO1PRE   **MO1PRE**   NOT ON FILE

DISPLAY INSTRUCTIONS:

    If STRUCTURE flag = 2 (MULTI-UNIT), display "building".
    Otherwise, display "home".

QUESTION TEXT:

Now we're going to ask about {leaving your/SP leaving {his/her}} {home/building} to go outside.

PRESS 1 AND ENTER TO CONTINUE

MO1   **mo1outoft**   R1 MO1 OFTEN GO OUTSIDE

QUESTION TEXT:

SHOW CARD MO1

In the last month, 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	MO10
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:
    IF MO1=5 (NEVER) SET DIDNTLEAVE FLAG TO 1 (YES)

BOX MO2   **BOXMO2**   NOT ON FILE

IF CANE FLAG=1 (YES) GO TO MO2
ELSE GO TO BOX MO3

MO2   **mo1outcane**   R1 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   **BOXMO3**   NOT ON FILE

IF WALKER FLAG=1 (YES), GO TO MO3
ELSE GO TO BOX MO4

MO3   **mo1outwalkr**   R1 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   **BOXMO4**   NOT ON FILE

If WHEELCHAIR flag = 1 (yes), go to MO4.
Otherwise, go to BOX MO5.

MO4   **mo1outwlchr**   R1 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 a 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   **BOXMO5**   NOT ON FILE

> If SCOOTER flag = 1 (yes), go to MO5.
> Otherwise, go to BOX MO6.

MO5   **mo1outsctr**   R1 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 a 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   **mo1outhlp**   R1 MO6 HELP GO OUTSIDE

DISPLAY INSTRUCTIONS:

> If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

QUESTION TEXT:

> In the last month, 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},} or someone paid to help {you/him/her}.

CODES

1	YES	
2	NO	MO8
	REFUSED	MO8
	DON'T KNOW	MO8

MO6a   **op1outhlp**   R1 MO6A HELPS SP GO OUTSIDE

                     op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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 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},} 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

1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO6, set HELPSGOOUTSIDE flag = 1 (yes).

MO7   mo1outslf   R1 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 most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	MO9
	REFUSED	
	DON'T KNOW	

MO8   mo1outdif   R1 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   mo1outyrgo   R1 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   BOXMO10   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   mo1outwout   R1 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

BOXMO11   NOT ON FILE

If STRUCTURE flag = 2 (multi-unit), go to MO11
Otherwise, go to BOX MO12.

MO11

mo1oftgoarea   R1 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)	BOX MO13
2	MOST DAYS (5-6 DAYS A WEEK)	BOX MO13
3	SOME DAYS (2-4 DAYS A WEEK)	BOX MO13
4	RARELY (ONCE A WEEK OR LESS)	BOX MO13
5	NEVER	
	REFUSED	
	DON'T KNOW	

BOX MO12

BOXMO12   NOT ON FILE

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.

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

mo1oflvslepr   R1 MO12 HOW OFTN LEAVE BEDROOM

QUESTION TEXT:

SHOW CARD MO1

> In the last month, how often did {you/SP} leave the room where {you sleep/{he/she} sleeps}? 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	MO23
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If MO12 = 5 (never leaves room), set DIDN'T LEAVE ROOM SLEEPS flag = 1 (yes).

BOX MO13　　　　BOXMO13　　　　NOT ON FILE

If CANE flag = 1 (yes), go to MO13.
Otherwise, go to BOX MO14.

MO13　　　　mo1insdcane　　　　R1 MO13 OFTEN USED CANE INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display "or building".

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　　　　BOXMO14　　　　NOT ON FILE

If WALKER flag = 1 (yes), go to MO14.
Otherwise, go to BOX MO15.

MO14　　　　mo1insdwalkr　　　　R1 MO14 OFTEN USED WALKER INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display "or building".

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   **BOXMO15**   NOT ON FILE

> If WHEELCHAIR HOME flag = 1 (yes), go to MO15.
> Otherwise, go to BOX MO16.

MO15   **mo1insdwlchr**   R1 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   **BOXMO16**   NOT ON FILE

> If SCOOTER HOME flag = 1 (yes), go to MO16.
> Otherwise, go to MO17.

MO16   **mo1insdsctr**   R1 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   mo1oftholdwl   R1 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} hold onto walls or furniture? 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   mo1insdhlp   R1 MO18 GOT HELP INSIDE

DISPLAY INSTRUCTIONS:

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,".

QUESTION TEXT:

> In the last month, 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},} or someone paid to help {you/{him/her}}.

CODES

1	YES	
2	NO	MO21
	REFUSED	MO21
	DON'T KNOW	MO21

MO19A op1insdhlp R1 MO19A HELPS SP INSIDE HOUSE

op1relatnshp R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODE LIST.

If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

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 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},} 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

1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO19, set HELPSAROUNDINSIDE flag = 1 (yes).

MO20　　　　　　　**mo1insdslf**　　　　R1 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	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	MO22
	REFUSED	
	DON'T KNOW	

MO21   mo1insddif   R1 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   mo1insdyrgo   R1 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 go around {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   BOXMO23   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   mo1insdwout   R1 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   BOXMO24   NOT ON FILE

If CANE flag = 1 (yes) or WALKER flag = 1 (yes), go to MO24.
Otherwise, go to MO25.

MO24   mo1beddev   R1 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   **mo1bedhlp**   R1 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},".

QUESTION TEXT:

In the last month, 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},} or someone paid to help {you/him/her}.

CODES

1	YES	
2	NO	MO27
	REFUSED	MO27
	DON'T KNOW	MO27

MO25a   **op1bedhlp**   R1 MO25A HELPS SP OUT OF BED

                          op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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

CODES

1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO25, set HELPSOUTOFBED flag = 1 (yes).

MO26　　　　　**mo1bedslf**　　　　　R1 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
	REFUSED	
	DON'T KNOW	

MO27   mo1beddif   R1 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   BOXMO28   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   mo1bedwout   R1 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

PROGRAMMER INSTRUCTIONS:

Go to Section DM – Duration of Mobility Accommodations.

Derived Variables from Items in MO Section	
mo1doutsfdf	R1 D EFFORT TO GO OUTSIDE SELF
mo1doutdevi	R1 D GO OUTSIDE USING DEVICES
mo1douthelp	R1 D GO OUTSIDE USING HELP
mo1dinsdsfdf	R1 D MOVE INSIDE SELF
mo1dinsddevi	R1 D MOVE INSIDE WITH DEVICES
mo1dinsdhelp	R1 D MOVE INSIDE WITH HELP
mo1dbedsfdf	R1 D GET OUT OF BED
mo1dbeddevi	R1 D DEVICE USE 2 GET OUT OF BED
mo1dbedhelp	R1 D HELP TO GET OUT OF BED

Flag Variables set in MO Section	
fl1didntleav	R1 F MO SP DID NOT LEAVE HOME
fl1ntlvrmslp	R1 F MO SP DID NOT LEAVE BEDROOM

BOX DM1   BOXDM1   NOT ON FILE

If MO6, MO18, and MO25=2 (NO), RF, or DK, go to DM1. Otherwise, go to DM2

DM1   dm1helpmobil   R1 DM1 GET HELP WITH MOBILITY

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (MULTI-UNIT), display "or building", and "leaving {your/his/her} building". Otherwise, display "leaving {your/his/her} home".

Display "year" in bold underlined text.

QUESTION TEXT:

In the last year, did {you/SP} ever get help with getting out of bed, getting around {your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}?

CODES

1	YES	DM3B
2	NO	BOX DM4
	REFUSED	BOX DM4
	DON'T KNOW	BOX DM4

DM2   dm1helpyrmor   R1 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 **dm1yrsgethlp** R1 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	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.
Soft range: 1-50.
Go to BOX DM4

DM3B **dm1mthgethlp** R1 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".

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}?

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
	DON'T KNOW

BOX DM4

BOXDM4   NOT ON FILE

If CANE flag =1 (YES) or WALKER flag =1 (YES) or WHEELCHAIR flag =1 (YES) or SCOOTER flag =1 (YES), go to DM5.
Otherwise, go to DM4.

DM4

dm1lstyrcane   R1 DM4 IN LST YR USE CANE WALKER

QUESTION TEXT:

In the last year, did {you/SP} ever use a cane, walker, wheelchair, or scooter?

CODES

1	YES	DM6B
2	NO	BOX DM7
	REFUSED	BOX DM7
	DON'T KNOW	BOX DM7

DM5

dm1caneforyr   R1 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

dm1yrsuscane   R1 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 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 DM7

DM6B   **dm1mtfrtcane**   R1 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}?

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
	DON'T KNOW

BOX DM7   **BOXDM7**   NOT ON FILE

> If {AGE on PERSON ROSTER } = 65, go to Section DT – Driving & Transportation.
> Else if DM3a= 997 (HELP WITH ACTIVITIES ENTIRE LIFE), go to BOX DM9.
> Else if {AGE on PERSON ROSTER} – {NUMBER OF YEARS from DM3A} ≤ 65, go to BOX DM9.

Otherwise, go to DM7PRE.

DM7PRE DM7PRE NOT ON FILE

QUESTION TEXT:

Now think about the time around when {you/SP} turned 65.

PRESS 1 AND ENTER TO CONTINUE

DM7 **dm1mobhelp65** R1 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 **dm1snc65mohl** R1 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 {AGE on PERSON ROSTER) – {NUMBER OF YEARS from DM6A} ≤ 65, go to Section DT -- Driving & Transportation.
Otherwise, go to DM9.

DM9   dm1at65uscan   R1 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   dm1snc65uscn   R1 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	
dm1dhlpyr	R1 D ANY MOBILITY HELP LAST YEAR
dm1dhlpst	R1 D MTHS MOBILITY HELP STARTED
dm1dhlpend	R1 D MONTHS MOBILITY HELP ENDED
dm1dhlpyrs	R1 D YEARS OF MOBILITY HELP
dm1ddeviyr	R1 D ANY DEVICE USE LAST YR
dm1ddevist	R1 D MTHS DEVICE USE SINCE START
dm1ddeviend	R1 D MONTHS DEVICE USE SINCE END

dm1ddeviyrs	R1 D YEARS OF DEVICE USE

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 DT1   **BOXDT1**   NOT ON FILE

If SS7 = 7 (blind), go to DT2.
If DIDN'T LEAVE flag = 1 (yes), go to DT2.
Otherwise, go to DT1.

DT1   **dt1oftedrive**   R1 DT1 HOW OFTEN DRIVE PLACES

DISPLAY INSTRUCTIONS:

DT1 THROUGH DT2d SHOULD BE DISPLAYED ON THE SAME SCREEN.
DISPLAY TEXT "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD 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)	DT3PRE
2	MOST DAYS (5-6 DAYS A WEEK)	DT3PRE
3	SOME DAYS (2-4 DAYS A WEEK)	DT3PRE
4	RARELY (ONCE A WEEK OR LESS)	DT3PRE
5	NEVER	
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If DT1 = 1, 2, 3, or 4, set DRIVES flag = 1 (YES).

DT2   **dt1lastdrove**   R1 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   **dt1mthltdrov**   R1 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   **dt1yrlsdrov**   R1 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 2010
Soft Range   1930 to 2010

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   **dt1mthagodrv**   R1 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   **dt1yragoldrv**   R1 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   **dt1ageltdrov**   R1 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 (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).

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 DT3PRE NOT ON FILE

QUESTION TEXT:

Now I have some questions about driving situations people sometimes avoid.

PRESS 1 AND ENTER TO CONTINUE

DT3
dt1avoidriv1	R1 DT3A AVOID DRIVING AT NIGHT
dt1avoidriv2	R1 DT3B AVOID DRIVING ALONE
dt1avoidriv3	R1 DT3C AVOID DRIVING HIGHWAYS
dt1avoidriv4	R1 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
dt1getoplcs1	R1 DT4A SP WALKED GOT PLACES
dt1getoplcs2	R1 DT4B GOT RIDE FAM FRIEND PD
dt1getoplcs3	R1 DT4C VANSHUTTLE PROV BY PLACE
dt1getoplcs4	R1 DT4D VAN SHUTTLE FOR SENIORS
dt1getoplcs5	R1 DT4E SP TOOK PUBLIC TRANSPRT

dt1getoplcs6	R1 DT4F SP TOOK TAXI GOT PLACES	
dt1getoplcs7	R1 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-g 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 BOXDT5A   NOT ON FILE

DT4b = 1 (yes, ride from family, friend, or someone paid to help), go to DT5A.
Otherwise, go to Section HA - Household Activities.

DT5A   **op1tkplhlp1**   R1 DT5A TAKES SP PLACES MOST

                        op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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

1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
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.

Do not display the following response codes: 1,2,3,4,7,8, and 37.

DT6 **dt1otfrfamtk** R1 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 **op1tkplhlp2** R1 DT7A TAKES SP PLACES OTH

 op1relatnshp R1 OTHR PRSN RELATIONSHIP TO SP

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

1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
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"

Do not display the following response codes: 1,2,3,4,7,8, and 37.

Go to Section HA - Household Activities

Flag Variables set in DT Section	
fl1drives	R1 F DT SP DRIVES CAR
fl1drvlstyr	R1 F DT SP DROVE CAR IN PAST YR

HA1PRE   HA1PRE   NOT IN 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   ha1laun   R1 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   **Code All That Apply**

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   ha1launslf   R1 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

ha1whrmachi1	R1 HA2 WASH MACHINE IN HOME
ha1whrmachi2	R1 HA2 WASH MACHIN IN BUILDING
ha1whrmachi3	R1 HA2 WASH MACHIN LAUNDROMAT
ha1whrmachi4	R1 HA2 WASH MACHIN SINK IN HOME
ha1whrmachi5	R1 HA2 WASH MACH SINK IN BUILDNG
ha1whrmachi6	R1 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 IN FILE

SPECIFY WHERE {SP} DID LAUNDRY.

ENTER TEXT

Length	50

BOX HA3A

HA3A	NOT IN FILE

If HA1 = 1 (always by self), go to HA5.
Otherwise, go to HA3a.

HA3A

op1launhlp	R1 HA3A HELPS SP WITH LAUNDRY
op1relatnshp	R1 OTHR PRSN RELATIONSHIP TO SP

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 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	Code All That Apply
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Do not display the following response codes: 1,2,3,4,7,8, and 37.
For each roster selection/addition at HA3, set HELPEDWITHLAUNDRY flag = 1 (yes).

BOX HA4 **BOXHA4** NOT IN 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 **ha1dlaunreas** R1 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.

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?

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 HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes).

BOX HA5   **BOXHA5**   NOT IN 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   **ha1laundif**   R1 HA5 DIFF DOING LAUNDY 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   **ha1launoft**   R1 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   **BOXHA7**   NOT IN 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   **ha1launwout**   R1 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 IN 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   **ha1shop**   R1 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?

CODES

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   **ha1shopslf**   R1 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

ha1howpaygr1	R1 HA22 PAY GROC PERS ITMS CASH
ha1howpaygr2	R1 HA22 PAY GROC PERS ITMS CHCK
ha1howpaygr3	R1 HA22 PAY GROC PERS ITMS DEBIT
ha1howpaygr4	R1 HA22 PAY GROC PERS CREDIT
ha1howpaygr5	R1 HA22 PAY GROC PERS FOOD STMP
ha1howpaygr6	R1 HA22 PAY GROC PERS SMON ELS
ha1howpaygr7	R1 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

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

	ha1howgtstr1	R1 HA23 DROVE TO THE STORE
	ha1howgtstr2	R1 HA23 FAM FRND PD HLP DROVE
	ha1howgtstr3	R1 HA23 VAN PLACE SP LIVES DROVE
	ha1howgtstr4	R1 HA23 VAN 4 DIS SENIORS DROVE
	ha1howgtstr5	R1 HA23 PUBLIC TRANSPORT 2 STORE
	ha1howgtstr6	R1 HA23 SP TOOK TAXI 2 THE STORE
	ha1howgtstr7	R1 HA23 SP WALKED TO THE STORE (from HA23a)
	ha1howgtstr8	R1 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

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	HA24A

	THE PLACE SP LIVES}	
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
91	OTHER (SPECIFY)	
	REFUSED	HA24A
	DON'T KNOW	HA24A

HA23A   HA23A   NOT IN FILE

SPECIFY HOW GOT TO STORE.

ENTER TEXT

Length   50

HA24A   **ha1shopcart**   R1 HA24A 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   **ha1shoplean**   R1 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   BOXHA25A   NOT IN FILE

HA25A   **op1shophlp**   R1 HA25A HELPS SP WITH SHOPPING

                   op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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   **Code All That Apply**
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Do not display the following response codes: 1,2,3,4,7,8, and 37.
For each roster selection/addition at HA3, set HELPEDWITHLAUNDRY flag = 1 (yes).

BOX HA26   **BOXHA26**   NOT IN 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   **ha1dshopreas**   R1 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.

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

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 LIK TO DO IT)

REFUSED   BOX HA27
DON'T KNOW   BOX HA27

PROGRAMMER INSTRUCTIONS:

If HA26 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHSHOPPING flag = 1 (yes).

BOX HA27   **BOXHA27**   NOT IN 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   **ha1shopdif**   R1 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   **ha1shopoft**   R1 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   **BOXHA29**   NOT IN 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   **ha1shopwout**   R1 HA29 EVER GO WITHOUT GROCRIES

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 IN FILE

QUESTION TEXT:

> Now let's turn to making hot meals.
>
> PRESS 1 AND ENTER TO CONTINUE

HA30   **ha1meal**   R1 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   **ha1mealslf**   R1 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   **ha1restamels**   R1 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

BOX HA31 **BOXHA31** NOT IN 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 **ha1oftmicrow** R1 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 **BOXHA32A** NOT IN FILE

If HA30 = 1 (always did by self) go to HA34.
Otherwise, go to HA32A.

HA32A **op1mealhlp** R1 HA32A HELPS SP WITH MEALS

   op1relatnshp R1 OTHR PRSN RELATIONSHIP TO SP

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 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	Code All That Apply
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Do not display the following response codes: 1,2,3,4,7,8, and 37.
For each roster selection/addition at HA32, set HELPEDWITHMEALS flag = 1 (yes).

BOX HA33   **BOXHA33**   NOT IN 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   **ha1dmealreas**   R1 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.

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

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	BOX HA34
	DON'T KNOW	BOX HA34

PROGRAMMER INSTRUCTIONS:

If HA33 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHMEALS flag = 1 (yes).

BOX HA34   **BOXHA34**   NOT IN 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   **ha1mealdif**   R1 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 making hot meals 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   **ha1mealoft**   R1 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   BOXHA36   NOT IN 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 (someone 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   ha1mealwout   R1 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 IN 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   ha1bank   R1 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	BOX HA43
	REFUSED	BOX HA44
	DON'T KNOW	BOX HA44

HA40A   **ha1bankslf**   R1 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   **op1bankhlp**   R1 HA42A HELPS SP WITH BANKING

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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	Code All That Apply
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Do not display the following response codes: 1,2,3,4,7,8, and 37.
For each roster selection/addition at HA42, set HELPEDWITHBANKING flag = 1 (yes).

BOX HA43   **BOXHA43**   NOT IN 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   **ha1dbankreas**   R1 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.

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

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	BOX HA44
DON'T KNOW	BOX HA44

PROGRAMMER INSTRUCTIONS:

If HA43 =1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHBANKING flag = 1 (yes).

BOX HA44　　　　**BOXHA44**　　　　NOT IN 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　　　　**ha1bankdif**　　　　R1 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　　　　**ha1bankoft**　　　　R1 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

BOXHA46 NOT IN 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

ha1bankwout R1 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 IN 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

ha1money R1 HA50 MONEY MATTERS TO HANDLE

DISPLAY INSTRUCTIONS:

Display "in the last year" in bold 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   ha1moneyhlp   R1 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   op1moneyhlp   R1 HA52A HELPS SP WITH MONEY

                                 op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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	Code All That Apply
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:
Do not display the following response codes: 1,2,3,4,7,8, and 37.
For each roster selection/addition at HA52, set HELPEDWITHMONEYMATTERS flag=1(yes).

Go to Section SC- Self-care Activities

Derived Variables from Items in the HA Section	
ha1dlaunsfdf	R1 D LAUNDRY SELF AND DIFF LEVEL
ha1dshopsfdf	R1 D SLF SHOPPING AND DIFF LEVEL
ha1dmealsfdf	R1 D SELF MEALS AND DIFF LEVEL
ha1dbanksfdf	R1 D SELF BANKS AND DIFF LEVEL
ha1dmealwhl	R1 D HELPER IS MEALS ON WHEELS
ha1dmealtkot	R1 D HELPER IS RESTAURNT TAKEOUT
ha1dlaunreas	R1 D LAUNDRY REASN WITH BY OTHERS [See HA4]
ha1dshopreas	R1 D SHOP REASN WITH BY OTHERS [See HA26]
ha1dmealreas	R1 D MEALS REASN WITH BY OTHERS [See HA33]
ha1dbankreas	R1 D BANK BILL REASON WITHBY OTH [See HA43]

SC1PRE   **SC1PRE**   NOT ON FILE

QUESTION TEXT:

Now I have a few questions about how {you eat/SP eats}.

PRESS 1 AND ENTER TO CONTINUE

SC1   **sc1eatdev**   R1 SC1 EVER USE ADAPTED UTENSILS

DISPLAY INSTRUCTIONS:

Display "adapted" in bold underlined text.

QUESTION TEXT:

In the last month, 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	SC3
7	ALWAYS FED THROUGH IV OR TUBE	SC7PRE
	REFUSED	SC3
	DON'T KNOW	SC3

SC2   **sc1eatdevoft**   R1 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   **sc1eathlp**   R1 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,".

QUESTION TEXT:

> In the last month, 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},} or someone paid to help {you/{him/her}}.

CODES

1	YES	
2	NO	SC5
	REFUSED	SC5
	DON'T KNOW	SC5

SC3A

op1eathlp	R1 SC3A HELPS SP WITH EATING
op1relatnshp	R1 OTHR PRSN RELATIONSHP TO SP

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 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   **Code All That Apply**

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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC3, set HELPSWITHEATING flag = 1 (yes).

SC4   **sc1eatslfoft**   R1 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   **sc1eatslfdif**   R1 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, continue with SC6.

SC6   **sc1eatwout**   R1 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

QUESTION TEXT:

Now I have a few questions about how {you get/SP gets} cleaned up.

PRESS 1 AND ENTER TO CONTINUE

SC7   **sc1showrbat1**   R1 SC7 SP SHOWERED

            sc1showrbat2   R1 SC7 SP TOOK BATHS IN A TUB

QUESTION TEXT:

In the last month, 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} 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	SC16PRE
	DON'T KNOW	SC16PRE

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 SC8   **BOXSC8**   NOT ON FILE

If more than one response to SC7, go to SC8.

Otherwise, go to BOX SC9.

SC8   **sc1prfrshbth**   R1 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

If BATHGRABBAR = 1 (yes) and [SHOWERING flag = 1 (yes) or TAKINGBATHS flag = 1 (yes)], go to SC9.

Otherwise, go to BOX SC10.

SC9   sc1scusgrbrs   R1 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   sc1shtubseat   R1 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   sc1bathhlp   R1 SC11 ANYN HLP SHOWR BATH OTHR

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".

If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".

QUESTION TEXT:

In the last month, 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},} or someone paid to help {you/{him/her}}.

CODES

1	YES	
2	NO	SC13
	REFUSED	SC13
	DON'T KNOW	SC13

SC11A   op1bathhlp   R1 SC11A HELPS SP WITH BATHING

                            op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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

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	Code All That Apply
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC11, set HELPSWITHBATHING flag = 1 (yes).

SC12   **sc1bathoft**   R1 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   sc1bathdif   R1 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   sc1bathyrgo   R1 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   sc1bathwout   R1 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

> 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

sc1usvartoi1	R1 SC16 SP USED PORTABLE COMMODE
sc1usvartoi2	R1 SC16 SP USED PADS UNDERGMT
sc1usvartoi3	R1 SC16 USED GRABBARS FR TOILET
sc1usvartoi4	R1 SC16 USED RAISED TOILET SEAT

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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), display variable text {c}.
If RAISEDTOILET flag = 1 (yes), display variable text {d}.

QUESTION TEXT:

> {[}In the last month, {have you/has SP} ever used{]}
>
> {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   sc1toilhlp   R1 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},".

QUESTION TEXT:

In the last month, 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},} or someone paid to help {you/{him/her}}.

CODES

1	YES	
2	NO	SC19
	REFUSED	SC19
	DON'T KNOW	SC19

SC17A   op1toilhlp   R1 SC17A HELPS SP WITH TOILETING

               op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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   **Code All That Apply**

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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC17, set HELPSWITHTOILETING flag = 1 (yes).

SC18   sc1toiloft   R1 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   sc1toildif   R1 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   sc1toilwout   R1 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

> The next few questions are about getting dressed. By getting dressed we mean changing out of the clothes {you/SP} slept in.
>
> PRESS 1 AND ENTER TO CONTINUE

SC21   **sc1dresoft**   R1 SC21 OFTEN YOU GET DRESSED

QUESTION TEXT:

> SHOW CARD SC4
>
> In the last month, 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 (2-4 DAYS A WEEK)	
4	RARELY (ONCE A WEEK OR LESS)	
5	NEVER	BOX SC27
	REFUSED	BOX SC27
	DON'T KNOW	BOX SC27

SC22   **sc1dresdev**   R1 SC22 USE SPECL ITEMS TO DRESS

QUESTION TEXT:

> In the last month, 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   **sc1dreshlp**   R1 SC23 ANYONE HELP GET DRESSED

DISPLAY INSTRUCTIONS:

> If IS3 = 2 (SP is female), display "or bra".
>
> If FACILITY flag = 1 (yes), display "a staff person from the place where {you live/{he/she} lives},".
>
> DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

> In the last month, 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?

CODES

1	YES	
2	NO	SC25
	REFUSED	SC25
	DON'T KNOW	SC25

SC23A

op1dreshlp   R1 SC23A HELPS SP WITH DRESSING

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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   **Code All That Apply**

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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC23, set HELPSWITHDRESSING flag = 1 (yes).

SC24   sc1dresslf   R1 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   sc1dresdif   R1 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   sc1dresyrgo   R1 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   sc1dreswout   R1 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

sc1deatdevi	R1 D USES DEVICES WHILE EATING
sc1deathelp	R1 D HAS HELP EATING
sc1deatsfdf	R1 D DIFF EATING BY SELF WO HELP
sc1dbathdevi	R1 D USES DEVICES WHILE BATHING
sc1dbathhelp	R1 D HAS HELP WHILE BATHING
sc1dbathsfdf	R1 D DIFF BATHING SELF NO HELP
sc1dtoildevi	R1 D USES DEVICE WHILE TOILETING
sc1dtoilhelp	R1 D HAS HELP WHILE TOILETING
sc1dtoilsfdf	R1 D DIFF LEVEL TOILETING SELF
sc1ddresdevi	R1 D USES DEVICES WHILE DRESSING
sc1ddreshelp	R1 D HAS HELP WHILE DRESSING
sc1ddressfdf	R1 D DIFF LEVEL DRESSING SELF

Flag variables set in SC Section

fl1showering	R1 F SC SP USES SHOWER
fl1takingbth	R1 F SC SP TAKES BATHS
fl1washingup	R1 F SC SP WASHES OTHER WAY

BOX DS   **BOXDS1**   NOT ON FILE

If SC3, SC11, SC17, SC23=2 (NO), RF, or DK, go to DS1.
Otherwise, go to DS2.

DS1   **ds1gethlpeat**   R1 DS1 GET HELP WITH EATING, ETC

DISPLAY INTRUCTIONS:

Display "last year" in bold underlined text.

QUESTION TEXT:

In the last year, did {you/SP} ever get help with eating, getting cleaned up, using the toilet, or getting dressed?

CODES

1	YES	DS3B
2	NO	BOX DS4
	REFUSED	BOX DS4
	DON'T KNOW	BOX DS4

DS2   **ds1hlpmrtnyr**   R1 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   **ds1yrsgethlp**   R1 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   **ds1mthgethlp**   R1 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".

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}?

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
	DON'T KNOW

BOX DS4   BOXDS4   NOT ON FILE

If {AGE on PERSON ROSTER} = 65, go to Section MC – Medical Care Activities.
Else if DS3a= 997 (HELP WITH ACTIVITIES ENTIRE LIFE), go to Section MC – Medical Care Activities.
Else if {AGE on PERSON ROSTER} – {NUMBER OF YEARS from DS3A} ≤ 65, go to Section MC – Medical Care Activities.
Otherwise, go to DS4PRE.

DS4PRE   DS4PRE   NOT ON FILE

Now think about the time around when {you/SP} turned 65.

PRESS 1 AND ENTER TO CONTINUE

DS4   ds1gthptrn65   R1 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   ds1gthpsin65   R1 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	
ds1dhlpyr	R1 D ANY SELF CARE HELP LAST YR
ds1dhlpst	R1 D MTHS SINCE SLF CARE HELP ST
ds1dhlpend	R1 D MTHS SINCE SLF CARE HLP END
ds1dhlpyrs	R1 D YEARS HELP IN CARING 4 SELF

MC1PRE   **MC1PRE**   NOT ON FILE

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   **mc1meds**   R1 MC1 IN MNTH TKE MEDS PRESCRBD

DISPLAY INSTRUCTIONS:

DISPLAY "in the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} take any medicines prescribed by a doctor?

CODES

1	YES	
2	NO	GO TO MC10PRE
	REFUSED	GO TO MC10PRE
	DON'T KNOW	GO TO MC10PRE

MC2   **mc1medstrk**   R1 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 MC{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	
	DON'T KNOW	

MC2A mc1medsslf R1 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 mc1whrgtmed1 R1 MC3 SP GOT MEDS LOCAL STORE

  mc1whrgtmed2 R1 MC3 SP GOT MEDS BY MAIL

  mc1whrgtmed3 R1 MC3 SP GOT MEDS HC PRVDR_HSP (from MC3A)

  mc1whrgtmed4 R1 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
91	SOMEWHERE ELSE (SPECIFY)	
	REFUSED	MC4
	DON'T KNOW	MC4

MC3A MC3A NOT ON FILE

QUESTION TEXT:

SPECIFY PLACE {SP} GOT PRESCRIBED MEDICINES IN THE LAST MONTH

ENTER TEXT

Length 50

BOX MC3b

BOXMC3b   NOT ON FILE

> If MC3 = 1 (LOCAL STORE OR PHARMACY), go to MC3B.
> Otherwise, go to MC4.

MC3B

mc1howpkupm1   R1 MC3B SP PICKD UP MEDS BY SELF
mc1howpkupm2   R1 MC3B SP HAD MEDS DELIVERED
mc1howpkupm3   R1 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

mc1medsrem   R1 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   **BOXMC5A**   NOT ON FILE

> If MC2 = 1 (always did by self), DK or RF, go to MC7.
> Otherwise, go to MC5A.

MC5A   **op1medshlp**   R1 MC5A HELPS SP WITH MEDICINES

                 op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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   **Code All That Apply**
1   SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC5, set HELPEDTRACKMEDS flag = 1 (yes).
Do not display these response codes: 1,2,3,4,7,8, and 37

BOX MC6   **BOXMC6**   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   **mc1dmedsreas**   R1 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.

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?

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 MC6 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPTRACKMEDS flag = 1 (yes).

BOX MC7   **BOXMC7**   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   **mc1medsdif**   R1 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 LITTLE
3   SOME
4   A LOT
     REFUSED
     DON'T KNOW

MC8   **mc1medsyrgo**   R1 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   **BOXMC9**   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   **mc1medsmis**   R1 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

The next questions are about how {you handle/SP handles} {your/{his/her}} medical care.

PRESS 1 AND ENTER TO CONTINUE

MC10   **mc1havregdoc**   R1 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
	REFUSED
	DON'T KNOW

MC12   **mc1regdoclyr**   R1 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   **mc1hwgtregd1**   R1 MC15 SP DROVE SELF TO REG DOC

mc1hwgtregd2	R1 MC15 FAM PD HLP DRVE REG DOC
mc1hwgtregd3	R1 MC15 VAN PLCE SP LIVE REG DOC
mc1hwgtregd4	R1 MC15 VAN FR DIS SENIOR REG DC
mc1hwgtregd5	R1 MC15 PUBLIC TRANSPORT REG DOC
mc1hwgtregd6	R1 MC15 SP TOOK TAXI TO REG DOC
mc1hwgtregd7	R1 MC15 SP WALKED TO REG DOC (from MC15A)
mc1hwgtregd8	R1 MC15 REG DOC WAS HOME VISIT (from MC15A)
mc1hwgtregd9	R1 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
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   mc1ansitindr   R1 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

op1dochlp   R1 MC17A SITS IN W SP AT DRS

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

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 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	Code All That Apply
1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:
For each roster selection/addition at MC17, set SATINWITHDOCTOR flag = 1 (yes).
Do not display these response codes: 1,2,3,4,7,8, and 37

MC17B   MC17B   NOT ON FILE

PRESS 1 AND ENTER TO CONTINUE

BOX MC18   **BOXMC18**   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   **op1dochlpmst**   R1 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

PROGRAMMER INSTRUCTIONS:

For roster entry selected at MC18, set SATINWITHDOCTORMOST flag = 1 (yes).

MC19   **mc1tpersevr1**   R1 MC19 HLP UPTO EXAM TBL DRESS
                          mc1tpersevr2   R1 MC19 REMND SP OF QSTNS FR DOC
                          mc1tpersevr3   R1 MC19 ASK TELL DOC THINGS 4 SP
                          mc1tpersevr4   R1 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 SATINWITHDOCTOR MOST flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES , 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 {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

PROGRAMMER INSTRUCTIONS:

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

MC20PRE   MC20PRE   NOT ON FILE

Now I have a few questions about handling medical bills and insurance.

PRESS 1 AND ENTER TO CONTINUE

MC20   mc1chginspln   R1 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   mc1anhlpwdec   R1 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   op1insurhlp   R1 MC22A HELPS WITH INSUR DECIS

                 op1relatnshp   R1 OTHR PRSN RELATIONSHP TO SP

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 on the PERSON ROSTER.

Display "first" and "last" in underlined text in the question text for name.

QUESTION TEXT:

Who helped or did this for {you/SP}?

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	Code All That Apply
1	SAMPLE PERSON
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	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:
For each roster selection/addition at MC22, set HELPEDMAKEINSURANCEDECISIONS flag=1 (yes).
Do not display these response codes: 1,2,3,4,7,8, and 37.
Go to Section PA- Participation.

Derived Variables from Items in the MC Section

mc1dmedssfdf	R1 D DIFF LEVEL MEDICATIONS SELF
mc1dmedsreas	R1 D MEDS REASN BY WITH OTHERS [SEE MC6]

PA1PRE   PA1PRE   NOT ON FILE

Now let's talk about other activities {you have/SP has} been doing in the last month.

PRESS 1 AND ENTER TO CONTINUE

PA1   pa1vistfrfam   R1 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   pa1hlkepfvst   R1 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   BOXPA3   NOT ON FILE

If DRIVES flag is null, go to PA3.
Otherwise, go to PA4.

PA3 **pa1trkpfrvis** R1 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 **pa1impvstfam** R1 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 **pa1attrelser** R1 PA5 EVER ATTEND RELIG SERVCES

DISPLAY INSTRUCTIONS:

Display PA5, 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 **pa1htkfrrlsr** R1 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 **BOXPA7** NOT ON FILE

If DRIVES flag is null, go to PA7.
Otherwise, go to PA8.

PA7 **pa1trprrelsr** R1 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 **pa1imprelser** R1 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 **pa1clbmtgrac** R1 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 **pa1hlkpfrclb** R1 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 **BOXPA11** NOT ON FILE

If DRIVES flag is null, go to PA11.
Otherwise, go to PA12.

PA11 **pa1trprkpfgr** R1 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 **pa1imparclub** R1 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 **pa1outfrenjy** R1 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 **pa1hlkpgoenj** R1 PA14 HLTH KP GO OUT FOR ENJOY

QUESTION TEXT:

In the last month, did {your/SP's} 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   **BOXPA15**   NOT ON FILE

> If DRIVES flag is null, go to PA15.
> Otherwise, go to PA16.

PA15   **pa1trprgoout**   R1 PA15 TRANSPROB 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   **pa1impouteny**   R1 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   **pa1workfrpay**   R1 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
	DON'T KNOW

PA19
PA19

PA18   **pa1hlkpfrwrk**   R1 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   **pa1voltrwork**   R1 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
	DON'T KNOW

PA21
PA21

PA20   **pa1hlkpfrvol**   R1 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   pa1prcranoth   R1 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},".
If PA17 = 1 (WORKED FOR PAY) and PA19 = 2 (NO VOLUNTEER WORK), display "a job".
If PA19 = 1 (VOLUNTEER WORK) and PA17 = 2 (NO WORK FOR PAY), display "volunteer work".
If PA17 = 1 (WORKED FOR PAY) and PA 19 = 1 (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/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   op1spcaredfr   R1 PA22D SP CARED FOR PERSON

op1relatnshp   R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display 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
91	OTHER RELATIVE
92	NOT RELATED

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at PA22, set PERSONSPCARESFOR flag = 1 (YES).

PA23   **pa1evrgowalk**   R1 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 **pa1vigoractv** R1 PA24 EVER VIGOROUS ACTIVTIES

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

PA25 **PA25** NOT ON FILE

DISPLAY INSTRUCTIONS:

Display PA25 and PA26 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 "NONE".

ENTER TEXT

Length   50

PROGRAMMER INSTRUCTIONS:

If PA25 = NONE (in any combination of upper and lower case), go to Section SD.

PA26 **pa1helmfvact** R1 PA26 HEALTH LIMIT FAV ACTIVTY

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

Derived Variables from Items in PA Section	
pa1dfavact	R1 D FAVORITE ACTIVITY

SD1PRE   **SD1PRE**   NOT ON FILE

The next questions are about smoking cigarettes.

PRESS 1 AND ENTER TO CONTINUE

SD1   **sd1smokedreg**   R1 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

SD2   **sd1smokesnow**   R1 SD2 SMOKES NOW

QUESTION TEXT:

{Do you/Does SP} smoke cigarettes now?

CODES

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

SD3   **sd1numcigday**   R1 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}"

IF NUMBER ENTERED VIOLATES THE HARD RANGE (SD3<1 OR SD3 >120) THEN DISPLAY ERROR MESSAGE #13 FROM THE GLOBAL SPECS.

QUESTION TEXT:

On average, how many cigarettes per day {{do you/does SP}/{did you/did SP}} usually smoke?

ENTER # OF CIGARETTES

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 40
REFUSED	
DON'T KNOW	

SD4   **sd1agesrtsmk**   R1 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   **sd1agelstsmk**   R1 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

QUESTION TEXT

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   **pe1whhndsign**   R1 PE1 HAND USE TO SIGN YOR 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   **pe1surghdwrt**   R1 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
	REFUSED	PE4
	DON'T KNOW	PE4

PE3   **pe1surgyside**   R1 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   **pe1flruppain**   R1 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
	REFUSED	PE6
	DON'T KNOW	PE6

PE5   **pe1sideflrup**   R1 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 up), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE6   **pe1surgarmsh**   R1 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
	DON'T	PE8

PE7 **pe1sidsurgar** R1 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 **pe1surgyhips** R1 PE8 SURG HIPS INCLUD 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 **pe1sidhipsrg** R1 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   **BOXPE11**   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   **pe1stndwhold**   R1 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) and HEIGHT flag = 2 (no) and WEIGHT flag = 2 (no).

BOX PE12   **BOXPE12**   NOT ON FILE

If CHAIRSTANDS flag = 2 (NO), go to PE13.
Otherwise, go to PE12.

PE12   **pe1upchbyslf**   R1 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   **BOXPE13**   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.

Otherwise go to PE13.

PE13   **pe1wlkdsself**   R1 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

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), display "NO".
Otherwise, display "YES".

In R3C1, display "2.".
In R3C2, display "WALKING COURSE".
In R3C3, if WALKINGCOURSE flag = 2 (no), display "NO".
Otherwise, display "YES".

In R4C1, use null display.
In R4C2, use null display.
In R4C3:
If WALKINGCOURSE flag ≠ 2 (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)], display "B. SOMETIMES USES CANE/WALKER AROUND HOME".

Else, if WALKINGCOURSE flag ≠ 2 (yes) and [MO13 = 1 (used cane every time inside) or MO14 = 1 (used walker every time inside)], display "C. ALWAYS USES CANE/WALKER AROUND HOME".

Otherwise, if WALKINGCOURSE flag <> 2 (yes) 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), display "NO".
Otherwise, display "YES".

In R6C1, display "4.".
In R6C2, display "GRIP STRENGTH".
In R6C3:
If LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag=2 (no), display "NO".
Else if LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag NE 2 (no), display "YES RIGHT".
Else if LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag=2 (no), display "YES LEFT".
Else if [LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag NE 2 (no)] and [RIGHTHANDED flag=1 (yes) or EITHERHANDED flag=1 (yes)], display "YES RIGHT".
Else if [LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag NE 2 (no)] and [LEFTHANDED flag = 1 (yes)], display "YES LEFT".
Otherwise, display "YES".

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 AROUND 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 ACTIVITIES 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	
fl1lefthand	R1 F PE CAN SP DO LEFT HAND TEST
fl1righthand	R1 F PE CAN SP DO RGT HAND TEST
fl1eiherhand	R1 F PE CAN SP DO EITHR HAND TST
fl1lftgrptst	R1 F PE CAN SP DO LFT GRIP TEST
fl1rhtgrptst	R1 F PE CAN SP DO RIGHT GRIP TST
fl1charstnds	R1 F PE CAN SP DO CHAIR STANDS
fl1balstands	R1 F PE CAN SP DO BALANCE STANDS
fl1wlkingrse	R1 F PE CAN SP DO WALKING COURSE

ab1datemonth   R1 AB COVER DATE MONTH

ab1dateyear   R1 AB COVER DATE YEAR

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

42625

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

3. CHAIR STANDS	☐ YES	☐ NO	22
4. GRIP STRENGTH	☐ YES **RIGHT** ☐ YES **LEFT**	☐ NO	28
5. PEAK AIR FLOW	*YES*		34

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*

24589

GENERAL INSTRUCTIONS

		:			☐ AM
					☐ PM

HRS   MINS

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?

in1strtabhrs	R1 IN8 START TIME HOURS
in1strtabmin	R1 IN8 START TIME MINUTES
in1strtmampm	R1 IN8 START TIME AM OR PM

42625

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42625

BALANCE STANDS

Balance Stands Administration:

	BA1
☐ YES ⬇	☐ NO GO TO **WALKING COURSE** p.16 ➡

> ➤ *Clear space for balance stands activity*
> ➤ *Get out stopwatch*

42625

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 ➡
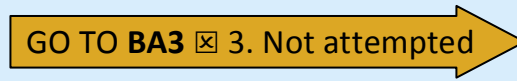
Help SP into position:
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position*

Are you ready?

YES ⬇	*NO*	GO TO **BA3** ☒ 3. Not attempted ➡
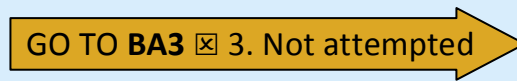
Ready, begin.

➤ *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.

42625
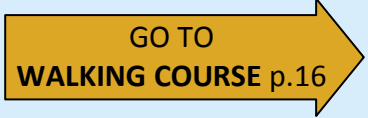
SIDE BY SIDE STAND — RESULTS

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

ba**1**blstdsecs   R1 BA4A SECS SIDE BY SIDE STAND

ba**1**blstdhndr   R1 BA4B HNRDS SIDE BY SIDE STND

ba**1**rsn1ssstd   R1 BA5 1 NO STAND SP FELT UNSAFE

ba**1**rsn2ssstd   R1 BA5 2 NO STAND PRXY FELT UNSF

ba**1**rsn3ssstd   R1 BA5 3 NO STND INTWR FELT UNSF

ba**1**rsn4ssstd   R1 BA5 4NO STND SP UNABL2UNDRSTD

ba**1**rsn9ssstd   R1 BA5 9 NO STAND OTHER SPECIFY

Balance Stands

42625

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.

42625

SEMI-TANDEM STAND — RESULTS

ba1stdmreslt   R1 BA7 SEMI TANDEM STAND RESULT

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

ba**1S**tdmsecs   R1 BA8A SECS HELD SEMI TANDM STD
ba**1**stdmhndr   R1 BA8B HNRDS HLD SEMI TANDM STD

ba**1**rsn1ststd   R1 BA9 1 NO STNDM SP FELT UNSAFE
ba**1**rsn2ststd   R1 BA9 2NO STNDM PRXY FELT UNSAF
ba**1**rsn3ststd   R1 BA9 3 NO STNDM INTR FELT UNSF
ba**1**rsn4ststd   R1 BA9 4NO STNDM SP UNABL2UNDSTD
ba**1**rsn9ststd   R1 BA9 9 NO STNDM OTHER SPECIFY

42625

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.

42625

FULL TANDEM STAND — RESULTS

ba1ftdmreslt R1 BA11 FULL TANDEM STAND RESULT

BA11

| ☐ 1. COMPLETED, HELD FOR 10 SEC | ☐ 2. ATTEMPTED, NOT HELD FOR 10 SEC | ☐ 3. NOT ATTEMPTED |

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

ba**1**ftdmsecs R**1** BA12A SECS HLD FULL TANDM STD

ba**1**ftdmhndr R**1** BA12B HNRDS HLD FLL TANDM STD

ba**1**rsn**1**ftstd R**1** BA13 1 NO FTNDM SP FLT UNSAFE

ba**1**rsn**2**ftstd R**1** BA13 2NO FTNDM PRXY FLT UNSAF

ba**1**rsn**3**ftstd R**1** BA13 3 NO FTNDM INTR FLT UNSF

ba**1**rsn**4**ftstd R**1** BA13 4NO FTNDM SP UNABL2UNDST

ba**1**rsn**9**ftstd R**1** BA13 9 NO FTNDM OTHER SPECIFY

42625

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*
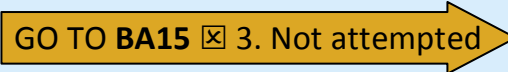
I want you to try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can. I will stop you at 30 seconds.

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 ➔
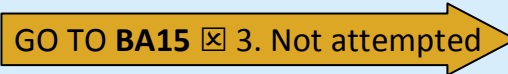
Help SP into position:
➤ *Support SP's <u>elbow</u> with one <u>hand</u> while standing slightly <u>behind</u> and <u>to the side</u>*
➤ *Hold stopwatch behind SP's back*
➤ *Check SP's feet position: 1 foot raised*

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.

42625

ONE LEG STAND EYES OPEN — RESULTS

☐ 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

Balance Stands

42625

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.

42625

ONE LEG STAND EYES CLOSED — RESULTS

ba11lecreslt   R1 BA19 ONE LEG STAND EYES CLOS

BA19

☐ 1. COMPLETED, HELD FOR 30 SEC	☐ 2. ATTEMPTED, NOT HELD FOR 30 SEC	☐ 3. NOT ATTEMPTED

BA20

BA21

WALKING COURSE
Next Page

Time held:

☐☐ " ☐☐

SECS   1/100

WALKING COURSE
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:

WALKING COURSE
Next Page

ba11lecsfsec   R1 BA20A SECS HLD 1LEG EYES CLOS
ba11lechndr   R1 BA20B HNRDS HLD 1LEG EYE CLOS

ba1rsn11lec   R1 BA21 1 NO1LEGEC SP FLT UNSAFE
ba1rsn21lec   R1 BA21 2NO1LEGEC PRXY FLT UNSAF
ba1rsn31lec   R1 BA21 3 NO1LEGEC INTR FLT UNSF
ba1rsn41lec   R1 BA21 4NO1LEGEC SP UNABL2UNDST
ba1rsn91lec   R1 BA21 9NO1LEGEC OTHER SPECIFY

42625

15

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42625

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*

wa**1**wlkcorspc   R1 WA2 WALKING COURSE SPACE

(side tab) Walking Course

42625

➤ *Reset stopwatch to 0:00'00"00*

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 ⬇ ☐ NO	GO TO **WA5** ☒ 3. Not attempted ➤

WA3b ☐	**Do you think it would be safe to try this _without_ a cane or walker?**
	☐ YES ⬇ ☐ 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 ⬇ ☐ NO	GO TO **WA5** ☒ 3. Not attempted ➤

Help SP into position:
➤ *Stand slightly _behind_ and _to the side_*
➤ *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 _moves_*
➤ *Walk slightly _behind_ and _to the side_ of SP*
➤ *Stop timing when one of SP's feet _completely_ crosses end line*

42625

WALKING COURSE 1 — RESULTS

wa**1**wkaidused   R1 WA4 WALKING AID USED COURSE 1   **WA4**

Aid used:

☐ 1. None

☐ 2. Cane

☐ 3. Walker or rollator

☐ 9. Other, specify: _____

wa**1**wlkc1rslt   R1 WA5 WALKING COURSE 1 RESULT   **WA5**

☐ 1. COMPLETED	☐ 2. ATTEMPTED	☐ 3. NOT ATTEMPTED
WA6		**WA7**

Completion time:

☐☐ . ☐☐

SECS   1/100

↓

WALKING COURSE 2
Next Page

GO TO
CHAIR STANDS p.22

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

42625

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 behind and to the side*
> *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 moves*
> *Walk slightly behind and to the side of SP*
> *Stop timing when one of SP's feet completely crosses end line*

wa1rsn11wkc	R1 WA7 1 WLKCOURS1 SP FLT UNSAFE
wa1rsn21wkc	R1 WA7 2WLKCOURS1 PRXY FLT UNSAF
wa1rsn31wkc	R1 WA7 3WLKCOURS1 INTR FLT UNSF
wa1rsn41wkc	R1 WA7 4WLKCOURS1 SP UNABL2UNDST
wa1rsn51wkc	R1 WA7 5WLKCOURS1 NOT APPR SPACE
wa1rsn91wkc	R1 WA7 9WLKCOURS1 OTHER SPECIFY

42625

WALKING COURSE 2 — RESULTS

Aid used:

☐ 1. None

☐ 2. Cane

☐ 3. Walker or rollator

☐ 9. Other, specify: _____

Walking Course

☐ 1. COMPLETED	☐ 2. ATTEMPTED	☐ 3. NOT ATTEMPTED
WA10		**WA11**

Completion time:

☐☐ . ☐☐
SECS   1/100

↓

CHAIR STANDS
Next Page

↓

CHAIR STANDS
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:

_____

↓

CHAIR STANDS
Next Page

wa1rsn12wkc   R1 WA11 1 WKCOURS2 SP FLT UNSAFE

wa1rsn22wkc   R1 WA11 2WKCOURS2 PRXY FLT UNSAF

wa1rsn32wkc   R1 WA11 3WKCOURS2 INTR FLT UNSF

wa1rsn42wkc   R1 WA11 4WKCOURS2 SP UNABL2UNDST

wa1rsn92wkc   R1 WA11 9WKCOURS2 OTHER SPECIFY   20

42625

Walking Course

42625

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*
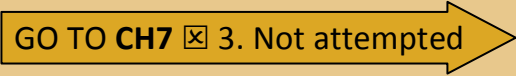
Chair Stands
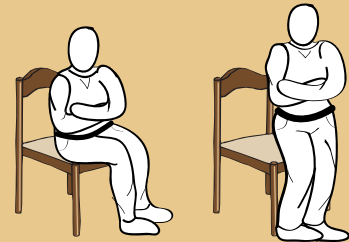
42625

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.

ch1chstcompl   R1 CH4 CHAIR STND COMPLETED TRY1 **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.

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

42625

REPEATED CHAIR STANDS

Now, I'm going to ask you to do the same movement, but this time as <u>QUICKLY</u> 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*
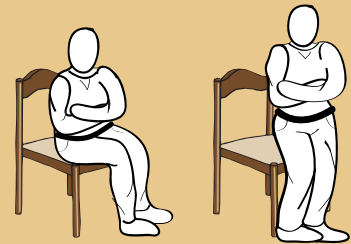
Are you ready?

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*

42625

REPEATED CHAIR STANDS — RESULTS

☐ **1. COMPLETED**   ☐ **2. ATTEMPTED**   ☐ **3. NOT ATTEMPTED**

CH13	CH14	CH16

CH13 — Completion time:

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

ch1chstndsec	R1 CH13A TIME REPEAT CH STD SECS
ch1chstdhndr	R1 CH13B TIME RPEAT CH STD HNRDS
ch1chstddone	R1 CH14 NUMBER CHAIR STANDS DONE
ch1chstntdn1	R1 CH15 1 CH STD SP TIRED
ch1chstntdn2	R1 CH15 2 CH STD SP USED ARMS
ch1chstntdn3	R1 CH15 3 CH STD OVER 1 MIN
ch1chstntdn4	R1 CH15 4 CH STD CNCRN SP SAFETY
ch1chstntdn5	R1 CH15 5 CH STD SP STOPPED
ch1chstntdn9	R1 CH15 9 CH STD OTHERSPECIFY
ch1chstntat1	R1 CH16 1 NO CH ST SP UNSAFE
ch1chstntat2	R1 CH16 2 NO CH ST PRXY UNSAFE
ch1chstntat3	R1 CH16 3 NO CH ST INTV UNSAFE
ch1chstntat4	R1 CH16 4 NO CH ST SP UNAB2UNDST
ch1chstntat9	R1 CH16 9 NO CH ST OTHER SPEC

42625

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Chair Stands

42625

GRIP STRENGTH

Grip Strength Administration:

➤ *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

42625

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.

42625

GRIP STRENGTH 1 — RESULTS

GR3
Hand tested:
☐ RIGHT
☐ LEFT

GR4
☐ GRIP POSITION SET TO 3

gr1handtstd1   R1 GR3 GRIP1 TEST WHICH HAND

gr1ad gr1ps3   R1 GR4 GRIP1POSITION ADJUST 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

gr1grp1reslt   R1 GR5 GRIP STRENGTH 1 RESULT
gr1grp1rdng   R1 GR6 GRP1 DISPLAY READING
gr1grp1noat1   R1 GR7 1 SP FELT UNSAFE
gr1grp1noat2   R1 GR7 2 PROXY FELT UNSAFE
gr1grp1noat3   R1 GR7 3 INTERVIEWR FELT UNSAFE
gr1grp1noat4   R1 GR7 4 SP UNABLE 2 UNDERSTAND
gr1grp1noat9   R1 GR7 9 OTHER SPECIFY

42625
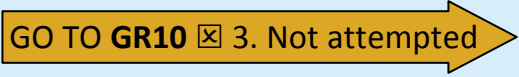
GRIP STRENGTH 2

> ➤ *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.

42625

GRIP STRENGTH 2 — RESULTS

GR8

Hand tested:

☐ RIGHT

☐ LEFT

GR9

☐ GRIP POSITION SET TO 3

gr1handtstd2   R1 GR8 GRIP2 TEST WHICH HAND
gr1adjgr2ps3   R1 GR9 GRIP2POSITION ADJUST TO 3

gr1grp2reslt   R1 GR10GRIP STRENGTH 2 RESULT   **GR10**

☐ 1. COMPLETED   ☐ 2. ATTEMPTED   ☐ 3. NOT ATTEMPTED

GR11

Display reading:

☐☐ . ☐ KG

⬇

WAIST CIRCUMFERENCE
Next Page

⬇

WAIST CIRCUMFERENCE
Next Page

GR12

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:

☐

⬇

WAIST CIRCUMFERENCE
Next Page

Grip Strength

gr1grp2reslt   R1 GR10GRIP STRENGTH 2 RESULT
gr1grp2rdng   R1 GR11GRP2 DISPLAY READING
gr1grp2noat1   R1 GR12 1 SP FELT UNSAFE
gr1grp2noat2   R1 GR12 2 PROXY FELT UNSAFE
gr1grp2noat3   R1 GR12 3 INTERVIEWR FELT UNSAFE
gr1grp2noat4   R1 GR12 4 SP UNABLE 2 UNDERSTAND
gr1grp2noat9   R1 GR12 9 OTHER SPECIFY

42625

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Grip Strength

42625

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*

42625

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.
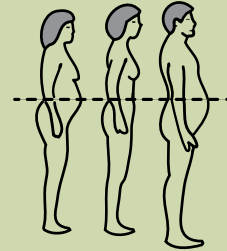
Do you think it would be safe to try this?

	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

42625
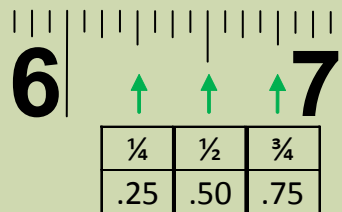
WAIST CIRCUMFERENCE — RESULTS

| 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 | | WC8 |

Tape measure reading:

☐☐ . ☐☐ INCHES

⬇

PEAK AIR FLOW
Next Page

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

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

42625

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wc1measdiff1	R1 WC2 1 MEAS DIFF NONE
wc1measdiff2	R1 WC2 2 MEAS DIFF DIFF BREATH
wc1measdiff3	R1 WC2 3 MEAS DIFF NOHOLD BREATH
wc1measdiff4	R1 WC2 4 MEAS DIFF EFFORT PAIN
wc1measdiff5	R1 WC2 5 MEAS DIFF EFFORT OTHER
wc1measdiff6	R1 WC2 6 MEAS DIFF LOCATE NAVEL
wc1measdiff9	R1 WC2 9 MEAS DIFF OTHER SPECIFY
wc1waistrslt	R1 W3 WAIST CIRCUMFRNC RESULTS
wc1wstmsrinc	R1 W4A WAIST MEASURE INCHES
wc1wstmsrqrt	R1W4B WAIST MEASURE QTR INCHES
wc1wstbulkcl	R1 WC5 BULKY CLOTHING WORN
wc1whomeasur	R1 WC6 WHO MEASURED
wc1wstpostn	R1 WC7 POSITION 4 WAIST MEASURE
wc1wstnotat1	R1 WC8 1 NO WC SP FELT UNSAFE
wc1wstnotat2	R1 WC8 2 NO WC PROXY UNSAFE
wc1wstnotat3	R1 WC8 3 NO WC INTERVIEWR UNSAFE
wc1wstnotat4	R1 WC8 4 NO WC SP UNABLE2UNDRSTD
wc1wstnotat5	R1 WC8 5 NO WC SP REFUSED
wc1wstnotat9	R1 WC8 9 NO WC OTHER SPECIFY

42625

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*

42625
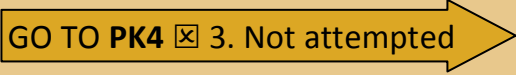
PEAK AIR FLOW 1

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.

42625

PEAK AIR FLOW 1 — RESULTS

pk**1**pkarf1pos R1 PK2 PEAK AIR FLOW 1 POSITION **PK2**

Activity position:

☐ 1. Standing

☐ 2. Sitting

☐ 3. Lying down

pk**1**pkarfl1ef R1 PK3 PK AIR FLW 1 EFFORT GIVEN **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

pk**1**pkarfl1rs R1 PK4 PEAK AIR FLOW 1 RESULT **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

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.

pk1pkarfl1rd   R1 PK5 PEAK AIR FLOW 1 READING

pk1pk1noatt1   R1 PK6 1 PEAK NO SP FELT UNSAFE

pk1pk1noatt2   R1 PK6 2 PEAK NO PROXY UNSAFE

pk1pk1noatt3   R1 PK6 3 PEAK NO INTERVWR UNSAFE

pk1pk1noatt4   R1 PK6 4 PEAK NO SP UNABL2UNDSTD

pk1pk1noatt9   R1 PK6 9 PEAK NO OTHER SPECIFY

42625

PEAK AIR FLOW 2 — RESULTS

pk1paf2posit   R1 PK7 PEAK AIR FLOW 2 POSITION   **PK7**

Activity position:

☐ 1. Standing

☐ 2. Sitting

☐ 3. Lying down

pk1pkafl3eff   R1 PK8 PEAK AIR FLW 2 EFFRT GIVN   **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

pk1pkarfl2rs   R1 PK9 PEAK AIR FLOW 2 RESULT   **PK9**

☐ 1. COMPLETED	☐ 2. ATTEMPTED	☐ 3. NOT ATTEMPTED
PK10		**PK11**

Meter reading:

☐☐☐ L/MIN

⬇

CLOSING
Next Page

⬇

CLOSING
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:

☐

⬇

CLOSING
Next Page

42625

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pk1pkarfl2rd	R1 PK10 PEAK AIR FLOW 2 READING
pk1pk2noatt1	R1 PK11 1 PEAK NO SP FELT UNSAFE
pk1pk2noatt2	R1 PK11 2 PEAK NO PROXY UNSAFE
pk1pk2noatt3	R1 PK11 3 PEAK NO INTRVWR UNSAFE
pk1pk2noatt4	R1 PK11 4 PEAK NO SP UNABL2UNDST
pk1pk2noatt9	R1 PK11 9 PEAK NO OTHER SPECIFY
ba1dblssadm	R1 D BALANCE SIDE BY SIDE ADMIN
ba1dblstadm	R1 D BALANCE SEMI TANDEM ADMIN
ba1dblftadm	R1 D BALANCE FULL TANDEM ADMIN
ba1dblopadm	R1 D BALANCE 1 LEG OP EYE ADMIN
ba1dblcladm	R1 D BALANCE 1 LEG CLS EYE ADMIN
wa1dwlkadm	R1 D WALKING COURSE ADMIN
ch1dschradm	R1 D SINGLE CHAIR ADMIN
ch1drchradm	R1 D REPEAT CHAIR ADMIN
gr1dgripadm	R1 D GRIP STRENGTH ADMIN
wc1dwaistadm	R1 D WAIST CIRCUMFERENCE ADMIN
pk1dpeakadm	R1 D PEAK AIR FLOW ADMIN
r1dnhatssppb	R1 D NHATS SPPB SCORE
r1dnhatsbasc	R1 D NHATS BALANCE SCORE
r1dnhatswksc	R1 D NHATS WALK SCORE
r1dnhatschsc	R1 D NHATS REPEAT CHAIR SCORE
r1dnhatsgrav	R1 D NHATS AVG GRIP SCORE
r1dnhatsgrb	R1 D NHATS BEST GRIP SCORE
r1dnhatspkav	R1 D NHATS AVG AIR FLOW SCORE
r1dnhatspkb	R1 D NHATS BEST AIR FLOW SCORE
r1dsppbmiss	R1 D REASON MISSING SPPB
r1dorigsppb	R1 D ORIGINAL SPPB SCORE
r1dorigbasc	R1 D ORIGINAL BALNCE SCORE
r1dorigwksc	R1 D ORIGINAL WALK SCORE
r1dorigchsc	R1 D ORIGINAL REPEAT CHAIR SCORE

CLOSING

Record end time:

$\boxed{}\boxed{}$: $\boxed{}\boxed{}$ ☐ 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*

Closing

⮕ GO TO **CAPI**

cl1endtimhrs   R1 CL1 HRS END TIME HOURS
cl1endtimmin   R1 CL1 MINS END TIME MINUTES
cl1endtmampm   R1 CL1 AMPM END TIME AM OR PM

42625

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   **hw1currweigh**   R1 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.

HW3   **hw1weighat50**   R1 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   **hw1lst10pnds**   R1 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   **hw1trytolose**   R1 HW5 WERE YOU TRYNG LOSE WEGHT

QUESTION TEXT:

{Were you/Was SP} trying to lose weight?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HW7   **hw1howtallft**   R1 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	HW9
DON'T KNOW	HW9

PROGRAMMER INSTRUCTIONS:

Hard range: 3-7.
Soft range: 4-6.

HW8   **hw1howtallin**   R1 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 to 11
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: 0-11

HW9   hw1tal50feet   R1 HW9 HOW TALL AT 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   hw1tal50inch   R1 HW10 HOW TALL AT AGE 50 INCHS

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

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   **el1borninus**   R1 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   **el1stateborn (Restricted)**   R1 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 of state names.
Display response label for state name selected.
All responses skip to EL5.

EL3   **el1cntryborn (Restricted)**   R1 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   EL3A   NOT ON FILE

QUESTION TEXT:

SPECIFY COUNTRY OF BIRTH

ENTER TEXT

ENTER TEXT

Length   50

EL4A   **el1dage2us**   R1 D AGE CAME TO 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   **el1dage2us**   R1 D AGE CAME TO 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   **el1hlthchild**   R1 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   **el1fingrowup**   R1 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   **el1lvbhpar15**   R1 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 **el1lvwmofaor** R1 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 **el1lvctytn15 (Restricted)** R1 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 **el1stlivag15 (Restricted)** R1 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 of state names.
Display response label for state name selected.

EL10　　　　　　　**el1higstschl**　　　　R1 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 any HOUSEHOLD MEMBER RELATIONSHIP = 13 (MOTHER), set EL11=1 (YES) and go to BOX EL12.
Otherwise go to EL11

EL11　　　　　　　**el1mothalive**　　　　R1 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 any HOUSEHOLD MEMBER RELATIONSHIP = 16(FATHER), set EL12=1 (YES) and go to Section RL – Race, Ethnicity, Language.
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 RL – Race, Ethnicity, Language.

Derived Variables from Items in EL Section	
el1dage2us	R1 D AGE CAME TO US
el1dsameres	R1 D CITY STATE NOW AND AGE 15

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   **rl1yourrace1 (Sensitive)**   R1 RL1 RACE OF SP WHITE
                         rl1yourrace2 (Sensitive)   R1 RL1 RACE OF SP AFRICN AMERICN
                         rl1yourrace3 (Sensitive)   R1 RL1 RACE OF SP AMERICN INDIAN
                         rl1yourrace4 (Sensitive)   R1 RL1 RACE OF SP ALASKA NATIVE
                         rl1yourrace5 (Sensitive)   R1 RL1 RACE OF SP ASIAN
                         rl1yourrace6 (Sensitive)   R1 RL1 RACE OF SP NATIVE HWAIIAN
                         rl1yourrace7 (Sensitive)   R1 RL1 RACE OF SP PACIFIC ISLNDR
                         rl1yourrace8 (Sensitive)   R1 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 **rl1primarace (Sensitive)** R1 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 RE1A
- REFUSED
- DON'T KNOW

RL3 **rl1hisplatno (Sensitive)** R1 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)** R1 RL4 HISP ETHNCTY MEXICAN AMER

rl1mexpurcu2 (Sensitive) R1 RL4 HISP ETHNCTY PUERO RICAN

rl1mexpurcu3 (Sensitive) R1 RL4 HISP ETHNCTY CUBAN AMER

rl1mexpurcu4 (Sensitive) R1 RL4 HISP ETHNCTY OTHR SPECIFY

rl1mexpurcu5 (Sensitive) R1 RL4 HISP ETHNCTY DOMINICAN (from RL4A)

rl1mexpurcu6 (Sensitive) R1 RL4 HISP ETHNCTY CENTRAL AMER (from RL4A)

rl1mexpurcu7 (Sensitive)   R1 RL4 HISP ETHNCTY SOUTH AMER (from RL4A)

rl1mexpurcu8 (Sensitive)   R1 RL4 HISP ETHNCTY SPANISH (from RL4A)

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

rl1condspanh   R1 RL5 INTRVIW CONDCTD IN SPANSH

QUESTION TEXT:

IS THIS INTERVIEW BEING CONDUCTED IN SPANISH?

CODES		
1	YES	RL7
2	NO	

RL6

rl1spkothlan   R1 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
	DON'T KNOW	SECTION VA

RL7   **rl1unspokeng**   R1 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   **rl1spkengwel**   R1 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	
rl1dracehisp	R1 D RACE AND HISPANIC ETHNICITY

VA1   **va1serarmfor**   R1 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	SECTION WB
	DON'T KNOW	SECTION WB

VA2   **va1whnserva1 (Sensitive)**   R1 VA2 WHEN SERVD BEFRE NOV 1941

                             va1whnserva2 (Sensitive)   R1 VA2 WHN SERVD WWII

                             va1whnserva3 (Sensitive)   R1 VA2 WHN SERVD 1947 TO 1950

                             va1whnserva4 (Sensitive)   R1 VA2 WHN SERVD KOREAN WAR

                             va1whnserva5 (Sensitive)   R1 VA2 WHN SERVD 1955 TO 1964

                             va1whnserva6 (Sensitive)   R1 VA2 WHN SERVD VIETNAM ERA

                             va1whnserva7 (Sensitive)   R1 VA2 WHN SERVD 1975 TO 1990

                             va1whnserva8 (Sensitive)   R1 VA2 WHN SERVD 1990 TO 2001

                             va1whnserva9 (Sensitive)   R1 VA2 WHN SERVD 2001 OR LATER

QUESTION TEXT:

SHOWCARD 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

va1memnatgrd   R1 VA3 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	SECTION WB
	REFUSED	SECTION WB
	DON'T KNOW	SECTION WB

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

wb1offelche1	R1 WB1 OFTEN YOU FEEL CHEERFUL
wb1offelche2	R1 WB1 OFTEN YOU FEEL BORED
wb1offelche3	R1 WB1 OFTEN YOU FEEL FULLOFLIFE
wb1offelche4	R1 WB1 OFTEN YOU FEEL UPSET

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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   **wb1truestme1**   R1 WB2 SP LIFE HAS MEANING PURPS

                        wb1truestme2   R1 WB2 SP FEELS CONFIDENT

                        wb1truestme3   R1 WB2 SP GAVE UP IMPROVING LIFE

                        wb1truestme4   R1 WB2 SP LIKES LIVING SITUATION

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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   **wb1ageyofeel**   R1 WB3 AGE YOU 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   **wb1agrwstmt1**   R1 WB4 SP SELF DETERMINATION

wb1agrwstmt2   R1 WB4 SP WANTS-FINDS WAY TO DO

wb1agrwstmt3   R1 WB4 SP ADJUSTS TO CHANGE

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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.

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   ip1covmedcad   R1 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   ip1otdrugcov   R1 IP2 DRUG COVERG SOME OTHR 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'TKNOW

IP3   ip1mgapmedsp   R1 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'TKNOW

IP4   **ip1cmedicaid**   R1 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   **ip1covtricar**   R1 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'TKNOW

IP6   **ip1nginsnurs**   R1 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'TKNOW	SECTION LF

IP7
           ip1typcarco1   R1 IP7 LTC INS NURSNG HOME COVD

           ip1typcarco2   R1 IP7 LTC INS ASSISTD LVNG COVD

           ip1typcarco3   R1 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   **ip1paypremms**   R1 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

IP9   **ip1longhadpl**   R1 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   **ip1numyears**   R1 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   **ip1agepurpol**   R1 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   LF1PRE   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   BOXLF1   NOT ON FILE

If FACILITY flag=1 (YES) and PA17 NE 1 (WORKED IN LAST MONTH), go to LF11.

Otherwise, go to LF1.

LF1   lf1workfpay   R1 LF1 WORKED FOR PAY RECENTLY

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 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	LF11
	REFUSED	
	DON'T KNOW	

LF2   lf1abstlstwk   R1 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	LF11
	REFUSED	LF11

	DON'T KNOW		LF11

LF3   **lf1wrkplstmn**   R1 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	LF11
	REFUSED	LF11
	DON'T KNOW	LF11

LF4   **lf1mrthnonjb**   R1 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   **lf1hrswkwork**   R1 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 70
REFUSED	LF8
DON'TKNOW	LF8

BOX LF6   **BOXLF6**   NOT ON FILE

LF6　　　　　　**lf1hrwrkltwk**　　　　R1 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 70	
REFUSED	LF8	
DON'T KNOW	LF8	

PROGRAMMER INSTRUCTIONS:
ALL RESPONSES SKIP TO LF8

LF7　　　　　　**lf1hrwrklstw**　　　　R1 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 70
REFUSED	
DON'T KNOW	

LF8　　　　　　**lf1oftpaid**　　　　R1 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	OTHER SCHEDULE (SPECIFY)	
	REFUSED	LF9
	DON'T KNOW	LF9

LF8A   **LF8A**   NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PAYMENT SCHEDULE

ENTER TEXT

Length   25

LF9   **lf1lstpaychk**   R1 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	LF11
	DON'T KNOW	LF11

LF9A   **lf1pychkamnt**   R1 LF9A PAYCHECK AMOUNT

QUESTION TEXT:

ENTER PAYCHECK AMOUNT   [LF10]

$ _____

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.

LF9B   **lf1perhrpay**   R1 LF9B PAY PER HOUR

QUESTION TEXT:

ENTER PAY PER HOUR   [LF10]

$ _____

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.

LF9C   **lf1perdaypay**   R1 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   **lf1ernfrmwrk**   R1 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.

LF11   **lf1occupaton**   R1 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 LF13
3	HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME	BOX LF13
	REFUSED	BOX LF13
	DON'T KNOW	BOX LF13

LF11A lf1doccpctgy R1 D LONGEST OCCUPATION CATEGORY

QUESTION TEXT:

ENTER OCCUPATION DESCRIPTION

ENTER TEXT

Length 75

BOX LF12 BOXLF12 NOT ON FILE

If LF1 or LF2 or LF3 = 1 (YES), go to LF12.
Otherwise, go to BOX LF13.

LF12 lf1diffwrknw R1 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
2	SOMETHING DIFFERENT
	REFUSED
	DON'T KNOW

BOX LF13 BOXLF13 NOT ON FILE

If [HH1= 1 (MARRIED) or 2 (LIVING WITH A PARTNER)] and [(HH11=1 (LIVES WITH SP) AND (FACILITY FLAG NE 1)) or HH12=1 (PRIVATE RESIDENCE)], go to LF13.

Otherwise, go to Section HP – Home Ownership.

LF13 lf1huswifwrk R1 LF13 HUSB WIFE PARTN PAY WORK

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 NE 2 and HH1=2 (LIVING WITH A PARTNER), display "partner"

Else if PROXY RELATIONSHIP NE 2 and HH5=1 (MALE), display "husband"

Else if PROXY RELATIONSHIP NE 2 and HH5=2 (FEMALE), display "wife"

QUESTION TEXT:

Did {you/your/SP's} {husband/wife/partner} 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   **lf1huwpaearn**   R1 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 NE 2 and HH1=2 (LIVING WITH A PARTNER), display "partner"

Else if PROXY RELATIONSHIP NE 2 and HH5=1 (MALE), display "husband"

Else if PROXY RELATIONSHIP NE 2 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	SECTION HP
DON'T KNOW	SECTION HP

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 LF Section	
lf1doccpctgy	R1 D LONGEST OCCUPATION CATEGORY

BOX HP1 BOXHP1 NOT ON FILE

If FACILITY flag = 1 (yes), go to Section IA – Income and Assets.
Otherwise, go to HP1.

HP1 **hp1ownrentot** R1 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 HH1 = 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}} own
the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}, rent it, or is
there some other arrangement?

CODES

1	OWN	
2	RENT	HP6
3	SOME OTHER ARRANGEMENT	HP5
	REFUSED	HP5
	DON'T KNOW	HP5

HP2 **hp1mrtpadoff** R1 HP2 MORTGAGE PAID OFF

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1= 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   **hp1mthlymort**   R1 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	HP3b
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   **hp1mortpaymt**   R1 HP3A MORTGAGE PAYMENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Is it……

CODES

1	less than $250,
2	$250 -$499,
3	$500-$999, or
4	$1,000 or more?
	REFUSED
	DON'T KNOW

HP3B **hp1whnpayoff**

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1= 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 **hp1amtstlowe**

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 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 9999999
Soft Range	500 to 900000
REFUSED	HP4
DON'T KNOW	

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
hp1amoutowed   R1 HP3D THE AMOUNT OWED IS

QUESTION TEXT:

SHOW CARD HP2

Is the amount owed…

CODES

1	less than $50,000,
2	between $50,000 and $100,000, or
3	over $100,000
	REFUSED
	DON'T KNOW

HP4
hp1homevalue   R1 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 9999999
Soft Range	500 to 900000
REFUSED	SECTION IA
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   **hp1homvalamt**   R1 HP4A HOME VALUE AMOUNT

QUESTION TEXT:

SHOW CARD HP3

Would it be...

CODES

1	less than $50,000,	SECTION IA
2	$50,000-$74,999,	SECTION IA
3	$75,000-$99,999,	SECTION IA
4	$100,000-$199,999,	SECTION IA
5	$200,000-$299,999,	SECTION IA
6	$300,000-$499,999,	SECTION IA
7	$500,000-$749,999, or	SECTION IA
8	$750,000 or more?	SECTION IA
	REFUSED	SECTION IA
	DON'T KNOW	SECTION IA

HP5   **hp1payrent**   R1 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 HH1=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 rent
to live here?

CODES

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

HP6   **hp1rentamt**   R1 HP6 RENT PAID EACH MONTH

QUESTION TEXT:

How much is that each month?

ENTER DOLLAR AMOUNT   [BOX HP7]

ENTER NUMBER

Range	1 to 9999
Soft Range	1 to 3000
REFUSED	HP7
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999
Soft Range: 1-3000

Use input mask in response field ($9,999) so that dollar sign is displayed and commas are inserted appropriately.

HP6A   **hp1rentamout**   R1 HP6A RENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Is it…

CODES

1	less than $250,
2	$250 -$499,
3	$500-$999, or
4	$1,000 or more?
	REFUSED
	DON'T KNOW

BOX HP7   **BOXHP7**   NOT ON FILE

If HP6>=$500 or HP6a=3 ($500-999) or 4 ($1,000 or more), go to Section IA – Income and Assets. Otherwise, go to HP7.

HP7   **hp1sec8pubsn**   R1 HP7 HME SEC 8 PUBL/SENOR HOUS

QUESTION TEXT:

Is this home in Section 8 or 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

	ia1recsspa1	R1 IA1 SP REC SOCIAL SECURITY
	ia1recsspa2	R1 IA1 SPOUSE PART REC SOC SEC
	ia1recsspa3	R1 IA1 NO SOC SECURTY PAYMNT REC

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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 HH1 = 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 bold 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})?
>
> IF NEEDED: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes.
>
> {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	IA4
	REFUSED	IA4
	DON'T KNOW	IA4

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 NE 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

IA2   **ia1howrecssp**   R1 IA2 HOW REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "Do you".
Otherwise, display "Does SP".

QUESTION TEXT:

{Do you/Does SP} get Social Security checks through the mail, or use direct deposit to a bank account?

CODES

1	MAIL
2	DIRECT DEPOSIT
	REFUSED
	DON'T KNOW

IA3A   **ia1msrtrecss (Sensitive)**   R1 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   **ia1yrstressp (Sensitive)**   R1 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 YEAR

ENTER NUMBER

      REFUSED
      DON'T KNOW

PROGRAMMER INSTRUCTIONS:

    Range: {CURRENT YEAR – 45} – {CURRENT YEAR}.
    Do not display the phrase 'Enter Number'.

IA4

ia1recssils1	R1 IA4 SP RECEIVD SSI LAST MONTH
ia1recssils2	R1 IA4 SPOUSE PRT REC SSI LST MO
ia1recssils3	R1 IA4 NO SSI RECEIVD LAST MONTH

DISPLAY INSTRUCTIONS:

    If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
    Otherwise, display "SP".

    If HH1 = 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 HH1 = 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

ia1rvapayls1	R1 IA5 SP REC PAY FRM VA LAST MO
ia1rvapayls2	R1 IA5 SPOUS PA REC VA PAY LSTMO

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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 HH1 = 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   **ia1penjobou1**   R1 IA6 SP HAS PENSION PLAN

          ia1penjobou2   R1 IA6 SPOUSE HAS PENSION PLAN

          ia1penjobou3   R1 IA6 NO PENSION PLAN

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1 = 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 HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

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 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.

IA7	ia1iraothac1	R1 IA7 SP HAS IRA OTH RETIRE ACC
	ia1iraothac2	R1 IA7 SPOUSE HAS IRA OTHR ACC
	ia1iraothac3	R1 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1 = 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 HH1 = 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 KEOGH".

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 retirement accounts?

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) and Keoghs are plans you set up on your own.

{SELECT ALL THAT APPLY}

CODES | Code All That Apply
1	YES, SP HAS 401K, 403B, IRA, OR KEOGH
2	YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH
3	NO ACCOUNTS OF THIS TYPE
	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

ia1mutfdstk1	R1 IA8 SP OWNS MUTUAL FUND STOCK
ia1mutfdstk2	R1 IA8 SPOUSE OWNS FUNDS STOCK
ia1mutfdstk3	R1 IA8 SP SPOUSE OWN FUNDS STOCK
ia1mutfdstk4	R1 IA8 NO FUNDS OR STOCK OWNED

DISPLAY INSTRUCTIONS:

If IA7 = 1 (SP RETIREMENT ACCT) 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 = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
Otherwise, display "Does SP" or "does SP".

If HH1 = 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 HH1 = 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

ia1ownbond1	R1 IA9 SP OWNS BONDS
ia1ownbond2	R1 IA9 SPOUSE OWNS BONDS
ia1ownbond3	R1 IA9 SP SPOUSE OWN BONDS
ia1ownbond4	R1 IA9 NO BONDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 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 HH1 = 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

ia1bnkacccd1	R1 IA10 SP OWNS CHECK ACCT
ia1bnkacccd2	R1 IA10 SPOUSE OWNS CHECK ACCT
ia1bnkacccd3	R1 IA10 SP SPOUSE OWN CHECK ACCT

ia1bnkacccd4		R1 IA10 NO CHECK ACCT OWNED
ia1bnkacccd5		R1 IA10 SP OWNS SAVINGS ACCT
ia1bnkacccd6		R1 IA10 SPOUSE OWNS SAVING ACCT
ia1bnkacccd7		R1 IA10 SP SPOUSE OWN SAVNG ACT
ia1bnkacccd8		R1 IA10 NO SAVINGS ACCT OWNED
ia1bnkacccd9		R1 IA10 SP OWNS CDS
ia1bnkaccc10		R1 IA10 SPOUSE OWNS CDS
ia1bnkaccc11		R1 IA10 SP SPOUSE OWN CDS
ia1bnkaccc12		R1 IA10 NO CDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 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 HH1 = 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 any of the following types of accounts?
>
> 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	**ia1realestt1**	R1 IA13 SP OWNS REAL ESTATE
	ia1realestt2	R1 IA13 SPOUSE OWNS REAL ESTATE
	ia1realestt3	R1 IA13 SP SPOUSE OWN REAL ESTTE
	ia1realestt4	R1 IA13 NO REAL ESTATE OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 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 HH1 = 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 {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 {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 about income 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   iassrrpymnt   R1 IA14 RECENT MTHLY SS RR PYMNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA15A
	REFUSED	IA14B
	DON'T KNOW	IA14B

IA14A   **ia1ssrrjtamt**   R1 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   **ia1ssrrjtest**   R1 IA14B ESTMT JOINT SSRR AMOUNT

QUESTION TEXT:

SHOW CARD IA2

Was it…

CODES

1	less than $1,200,	BOX IA17
2	$1,200-$1,599,	BOX IA17
3	$1,600-$1,999,	BOX IA17
4	$2,000-$2,499, or	BOX IA17
5	$2,500 or more?	BOX IA17
	REFUSED	BOX IA17
	DON'T KNOW	BOX IA17

IA15A **ia1ssrrspamt** R1 IA15A SP SS RR AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 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 **ia1ssrrspest** R1 IA15B ESTIMATE SP SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Was it…

CODES

1   less than $600,
2        $600-$899,
3        $900-$1,099,
4        $1,100-$1,499, or
5        $1,500 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 **ia1ssrrptamt** R1 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. The nearest $100 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 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 **ia1ssrrptest** R1 IA16B ESTIMT PARTNR SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Was it…

CODES

1	less than $600,
2	$600-$899,
3	$900-$1,099,
4	$1,100-$1,499, or
5	$1,500 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   **ia1ssipymnt**   R1 IA17 RECENT MTHLY SSI PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA18A
	REFUSED	IA17B
	DON'T KNOW	IA17B

IA17A   **ia1ssijtamt**   R1 IA17A JOINT SSI AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range   1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If IA17A = 1-9999, go to BOX IA20.

IA17B   **ia1ssijtest**   R1 IA17B ESTIMATE JOINT SSI AMT

QUESTION TEXT:

SHOW CARD IA4

Was it...

CODES

1	less than $300,	BOX IA20
2	$300-$699,	BOX IA20
3	$700-$999, or	BOX IA20
4	$1000 or more?	BOX IA20
	REFUSED	BOX IA20
	DON'T KNOW	BOX IA20

IA18A   **ia1ssispamt**   R1 IA18A SP SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 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   **ia1ssipest**   R1 IA8B ESTIMATE SP SSI AMOUNT

QUESTION TEXT:

SHOW CARD IA5

Was it…

CODES

1	less than $100,
2	$100-$199,
3	$200-$399,
4	$400-$699, or
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   **ia1ssiptamt**   R1 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. The nearest $100 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 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   **ia1ssiptest**   R1 IA19B ESTIMATE PARTNR SSI AMT

QUESTION TEXT:

   SHOW CARD IA5

   Was it…

CODES

   1   less than $100,
   2          $100-$199,
   3          $200-$399,
   4          $400-$699, or
   5          $700 or more?
              REFUSED
              DON'T KNOW

BOX IA20   **BOXIA20**   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 **ia1vapymnt** R1 IA20 RECENT MNTHLY VA PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA21A
	REFUSED	IA20B
	DON'T KNOW	IA20B

IA20A **ia1vajtamt** R1 IA20A JOINT VA AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range   1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If IA20A = 1-9999, go to BOX IA23.

IA20B **ia1vajtest** R1 IA20B ESTIMAT JOINT VA AMOUNT

QUESTION TEXT:

SHOW CARD IA6

Was it…

CODES

1	less than $600,	BOX IA23
2	$600-$799,	BOX IA23
3	$800-$999,	BOX IA23
4	$1,000-$1,199, or	BOX IA23
5	$1,200 or more?	BOX IA23

| | REFUSED | BOX IA23 |
| | DON'T KNOW | BOX IA23 |

IA21A   **ia1vaspamt**   R1 IA21A SP VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 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   **ia1vaspest**   R1 IA21B ESTIMATE SP VA AMOUNT

QUESTION TEXT:

SHOW CARD IA7

Was it…

CODES

1	less than $500,
2	$500-$699,
3	$700-$899,
4	$900-$1,099, or
5	$1,100 or more?
	REFUSED
	DON'T KNOW

BOX IA22A   **BOXIA22A**   NOT ON FILE

If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22a.
Otherwise, go to BOX IA23.

IA22A   **ia1vaptamt**   R1 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. The nearest $100 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 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   **ia1vaptest**   R1 IA22B ESTIMATE PARTNR VA AMT

QUESTION TEXT:

> SHOW CARD IA7
>
> Was it…

CODES

>   1   less than $500,
>   2 $500-$699,
>   3 $700-$899,
>   4 $900-$1,099, or
>   5 $1,100 or more?
>   REFUSED
>   DON'T KNOW

BOX IA23   **BOXIA23**   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 **ia1penpymt** R1 IA23 RCNT MTH JOBPENSION PYMT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS	IA24A
	SEPARATELY	
	REFUSED	IA23B
	DON'T KNOW	IA23B

IA23A **ia1penjtamt** R1 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 **ia1penjtest** R1 IA23B EST JOINT JOB PENSN AMT

QUESTION TEXT:

SHOW CARD IA8

Was it…

CODES

1	less than $600,	BOX IA26
2	$600-$1,099,	BOX IA26
3	$1,100-$2,099,	BOX IA26
4	$2,100-$4,499, or	BOX IA26

5	$4,500 or more?	BOX IA26
	REFUSED	BOX IA26
	DON'T KNOW	BOX IA26

IA24A

ia1penspamt R1 IA24A SP JOB PENSION AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 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

ia1penspest R1 IA24B EST SP JOB PENSION AMT

QUESTION TEXT:

SHOW CARD IA9

Was it…

CODES

1	less than $400,
2	$400-$799,
3	$800-$1,499,
4	$1,500-$3,399, or
5	$3,400 or more?
	REFUSED
	DON'T KNOW

BOX IA25A

BOXIA25A NOT ON FILE

If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25a.
Otherwise, go to BOX IA26.

IA25A

ia1pentamt R1 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. The nearest $100 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 SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range   1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

IA25B

ia1penptest R1 IA25B EST PARTNR JOB PEN AMT

QUESTION TEXT:

SHOW CARD IA9

Was it…

CODES

1   less than $400,
2          $400-$799,
3          $800-$1,499,
4          $1,500-$3,399, or
5          $3,400 or more?
           REFUSED
           DON'T KNOW

BOX IA26   BOXIA26   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   **ia1retworth**   R1 IA26 RETIREMENT ACCOUNT WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 Keough accounts.

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.

CODES
1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA27A
	REFUSED	IA26B
	DON'T KNOW	IA26B

IA26a   **ia1retjtwrt**   R1 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 **ia1retjtest** R1 IA26B EST JOINT RET ACCT WRTH

QUESTION TEXT:

> SHOW CARD IA10
>
> Is it…

CODES

1	less than $16,000,	BOX IA29
2	$16,000-$49,999,	BOX IA29
3	$50,000-$118,999,	BOX IA29
4	$119,000-$224,999, or	BOX IA29
5	$225,000 or more?	BOX IA29
	REFUSED	BOX IA29
	DON'T KNOW	BOX IA29

IA27a **ia1retspwrt** R1 IA27A SP RETIREMENT ACCT WRTH

DISPLAY INSTRUCTIONS:

> If PROXY flag = 2 (no), 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 Keough accounts.
>
> 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 SP 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 IA27A = 1-999999, go to BOX IA28a.

IA27b **ia1retspest** R1 IA27B EST SP RET ACCT WORTH

QUESTION TEXT:

> SHOW CARD IA11
>
> Is it…

CODES

1	less than $10,000,
2	$10,000-$27,999,
3	$28,000-$54,999,
4	$55,000-$143,999, or
5	$144,000 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 **ia1retptwrt** R1 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 Keough accounts.
>
> 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 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   **ia1retptest**   R1 IA28B EST PARTNR ACCT WORTH

QUESTION TEXT:

> SHOW CARD IA11
>
> Is it…

CODES

1	less than $10,000,
2	$10,000-$27,999,
3	$28,000-$54,999,
4	$55,000-$143,999, or
5	$144,000 or more?
	REFUSED
	DON'T KNOW

BOX IA29   **BOXIA29**   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   **ia1rtlmwdrw**   R1 IA29 RETRMNT WDRW AMT LST MTH

DISPLAY INSTRUCTIONS:

> If PROXY flag = 2 (no) 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 bold 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS	IA30A
	SEPARATELY	
	REFUSED	IA29B
	DON'T KNOW	IA29B

IA29a   **ia1rtlmjtwdr**   R1 IA29A JOINT RET WDRW LST MTH

QUESTION TEXT:

> ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range   1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: $1-$9,999
Do not display the phrase 'Enter Number'.
If IA29A = 1-9999, go to BOX IA32.

IA29b   **ia1rtlmjtest**   R1 IA29B EST JONT RET WDR LS MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

> SHOW CARD IA12
>
> For last month, was it…

CODES

1	less than $200,	BOX IA32
2	$200-$299,	BOX IA32
3	$300-$699,	BOX IA32
4	$700-$1,499, or	BOX IA32
5	$1,500 or more?	BOX IA32
	REFUSED	BOX IA32
	DON'T KNOW	BOX IA32

IA30a   **ia1rtlmspwdr**   R1 IA30A SP RET WDRWL LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 SP RETIREMENT ACCOUNT 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 IA30A = 1-9999, go to BOX IA31a.

IA30b   **ia1rtlmspest**   R1 IA30B EST SP RET WDR LST MNTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13

For last month, was it…

CODES

1	less than $100,
2	$100-$199,
3	$200-$399,
4	$400-$1,099, or
5	$1,100 or more?
	REFUSED
	DON'T KNOW

BOX IA31a   **BOXIA31a**   NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31a.
Otherwise, go to BOX IA32.

IA31a   **ia1rtlmptwdr**   R1 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. The nearest $100 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 SPOUSE/PARTNER RETIREMENT ACCOUNT 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 IA31A = 1-9999, go to BOX IA32.

IA31b   **ia1rtImptest**   R1 IA31B EST PARTNR WDR LST MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13

For last month, was it…

CODES

1	less than $100,
2	$100-$199,
3	$200-$399,
4	$400-$1,099, or
5	$1,100 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   **ia1rtyrwdrw**   R1 IA32 RETRMNT WDRWL AMT LST YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA33A
	REFUSED	IA32B
	DON'T KNOW	IA32B

IA32a   ia1rtyrjtamt   R1 IA32A AMT JOINT RET WDR LS YR

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 IA32A = 1-9999999, go to BOX IA35.

IA32b   ia1rtyrjtest   R1 IA32B EST JOINT RET WDR LS YR

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA14

For last year, was it…

CODES

1	less than $2,400,	BOX IA35
2	$2,400-$3,599,	BOX IA35
3	$3,600-$8,399,	BOX IA35
4	$8,400-$17,999, or	BOX IA35
5	$18,000 or more?	BOX IA35
	REFUSED	BOX IA35
	DON'T KNOW	BOX IA35

IA33a   **ia1rtyrspamt**   R1 IA33A SP AMT RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest $100 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 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 IA33A = 1-9999999, go to BOX IA34a.

IA33b   **ia1rtyrspest**   R1 IA33B EST SP RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:
Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA15

For last year, was it…

CODES

1	less than $1,200,
2	$1,200-$2,399,
3	$2,400-$4,799,
4	$4,800-$13,199, or
5	$13,200 or more?
	REFUSED
	DON'T KNOW

BOX IA34A   BOXIA34A   NOT ON FILE

> If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34a.
> Otherwise, go to BOX IA35.

IA34a   **ia1rtyrptamt**   R1 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. The nearest $100 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 SPOUSE/PARTNER 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 IA34A = 1-9999999, go to BOX IA35.

IA34b   **ia1rtyrptest**   R1 IA34B EST PRTNR WDR RET LS YR

DISPLAY INSTRUCTIONS:
Display "last year" in underlined text.

QUESTION TEXT:

> SHOW CARD IA15
>
> For last year, was it…

CODES

1	less than $1,200,
2	$1,200-$2,399,
3	$2,400-$4,799,
4	$4,800-$13,199, or
5	$13,200 or more?

REFUSED
DON'T KNOW

BOX IA35   **BOXIA35**   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   **ia1skbdwrth**   R1 IA35 NONRETR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA36A
	REFUSED	BOX IA35B
	DON'T KNOW	BOX IA35B

IA35a   **ia1skbdjtwrt**   R1 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   **ia1skbdjtest**   R1 IA35B EST JOINT STKS BNDS WRT

QUESTION TEXT:

SHOW CARD IA16

Is it…

CODES

1	less than $62,000,	BOX IA38
2	$62,000-$85,999,	BOX IA38
3	$86,000-$149,999,	BOX IA38
4	$150,000-$434,999, or	BOX IA38
5	$435,000 or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA35c   **ia1bndjtest**   R1 IA35C EST JOINT ONLY BNDS WRT

QUESTION TEXT:

SHOW CARD IA17

Is it…

CODES

1	less than $1,000,	BOX IA38
2	$1,000-$1,999,	BOX IA38
3	$2,000-$19,999,	BOX IA38
4	$20,000-$49,999, or	BOX IA38
5	$50,000- or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA36a **ia1skbdspwrt** R1 IA36A SP STKS BONDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 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 **ia1skbdspest** R1 IA36B EST SP STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it…

CODES

1	less than $77,000,	BOX IA37A
2	$77,000-$79,999,	BOX IA37A
3	$80,000-$171,999,	BOX IA37A
4	$172,000-$199,999, or	BOX IA37A
5	$200,000- or more?	BOX IA37A
	REFUSED	BOX IA37A
	DON'T KNOW	BOX IA37A

IA36c   **ia1bndspest**   R1 IA36C EST SP ONLY BNDS WRTH

QUESTION TEXT:

> SHOW CARD IA19
>
> Is it…

CODES

1	less than $1,000,
2	$1,000-$15,999,
3	$16,000-$33,999,
4	$34,000-$55,999, or
5	$56,000- or more?
	REFUSED
	DON'T KNOW

BOX IA37a   **BOXIA37a**   NOT ON FILE

> If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37a.
> Otherwise, go to BOX IA38.

IA37a   **ia1skbdptwrt**   R1 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. 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 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   **ia1skbdptest**   R1 IA37B PART EST STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it…

CODES

1	less than $77,000,	BOX IA38
2	$77,000-$79,999,	BOX IA38
3	$80,000-$171,999,	BOX IA38
4	$172,000-$199,999, or	BOX IA38
5	$200,000- or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA37c   **ia1bndptest**   R1 IA37C PART EST ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Is it…

CODES

1	less than $1,000,
2	$1,000-$15,999,
3	$16,000-$33,999,
4	$34,000-$55,999, or
5	$56,000- or more?
	REFUSED
	DON'T KNOW

BOX IA38   **BOXIA38**   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 ia1bkcdwrth R1 IA38 BANK ACCT CD WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest $100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA39A
	REFUSED	BOX IA38B
	DON'T KNOW	BOX IA38B

IA38a ia1bkcdjtwrt R1 IA38A JOINT BNK ACCT CD WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range   1 to 999999

PROGRAMMER INSTRUCTIONS:

Range: $1-$999,999
Do not display the phrase 'Enter Number'.
If IA38A = 1-999,999, go to BOX IA41.

BOX IA38b

BOXIA38b NOT ON FILE

> If IA10c = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38b.
> Otherwise, go to IA38c.

IA38b

ia1bkcdjtest R1 IA38B EST JOINT BNK CD WRTH

QUESTION TEXT:

> SHOW CARD IA20
>
> Is it…

CODES

1	less than $11,000,	BOX IA41
2	$11,000-$22,999,	BOX IA41
3	$23,000-$44,999,	BOX IA41
4	$45,000-$112,999, or	BOX IA41
5	$113,000- or more?	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA38c

ia1bnkjtest R1 IA38C EST JOINT BNK NO CD WRT

QUESTION TEXT:

> SHOW CARD IA21
>
> Is it…

CODES

1	less than $1,000,	BOX IA41
2	$1,000-$5,999,	BOX IA41
3	$6,000-$13,999,	BOX IA41
4	$14,000-$35,999, or	BOX IA41
5	$36,000- or more?	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA39a

ia1bkcdspwrt R1 IA39A SP BNK CDS WORTH

DISPLAY INSTRUCTIONS:

> If PROXY flag = 2 (no), 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. The nearest $100 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 SP ACCOUNTS TOTAL 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 IA39A = 1-999,999, go to BOX IA40a.

BOX IA39b   **BOXIA39b**   NOT ON FILE

If IA10c = 1 (SP CDs), go to IA39b.
Otherwise, go to IA39c.

IA39b   **ia1bkcdspest**   R1 IA39B SP EST BNK ACCT CD WRTH

QUESTION TEXT:

> SHOW CARD IA22
>
> Is it…

CODES

1	less than $10,000,	BOX IA40A
2	$10,000-$22,999,	BOX IA40A
3	$23,000-$55,999,	BOX IA40A
4	$56,000-$80,999, or	BOX IA40A
5	$81,000 or more?	BOX IA40A
	REFUSED	BOX IA40A
	DON'T KNOW	BOX IA40A

IA39c   **ia1bnkspest**   R1 IA39C SP EST BNK NO CD WRTH

QUESTION TEXT:

> SHOW CARD IA23
>
> Is it…

CODES

1	less than $600,
2	$600-$999,
3	$1,000-$2,999,
4	$3,000-$10,999, or
5	$11,000 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   **ia1bkcdptwrt**   R1 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. The nearest $100 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 SPOUSE/PARTNER ACCOUNTS TOTAL 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 IA40A = 1-999999, go to BOX IA41.

BOX IA40b BOXIA40b   NOT ON FILE

If IA10c = 2 (SPOUSE CDS), go to IA40b.
Otherwise, go to IA40c.

IA40b ia1bkcdptest   R1 IA40B EST PARTNR BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Is it…

CODES

1	less than $10,000,	BOX IA41A
2	$10,000-$22,999,	BOX IA41A
3	$23,000-$55,999,	BOX IA41A
4	$56,000-$80,999, or	BOX IA41A
5	$81,000 or more?	BOX IA41A
	REFUSED	BOX IA41A
	DON'T KNOW	BOX IA41A

IA40c ia1bnkptest   R1 IA40C EST PART BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Is it…

CODES

1	less than $600,
2	$600-$999,
3	$1,000-$2,999,
4	$3,000-$10,999, or
5	$11,000 or more?
	REFUSED
	DON'T KNOW

BOX IA41 BOXIA41   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   **ia1itdvinc**   R1 IA41 AMT INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA42A
	REFUSED	IA41B
	DON'T KNOW	IA41B

IA41a   **ia1Itdvjtamt**   R1 IA41A JOINT INT DIV INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

      Range   1 to 99999

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999
Do not display the phrase 'Enter Number'.
If IA41A = 1-99999, go to BOX IA44.

IA41b   **ia1ltdvjtest**   R1 IA41B EST JNT INTDV INC LS YR

QUESTION TEXT:

> SHOW CARD IA24
>
> Was it…

CODES

1	less than $500,	BOX IA44
2	$500-$999,	BOX IA44
3	$1,000-$3,999,	BOX IA44
4	$4,000-$15,999, or	BOX IA44
5	$16,000 or more?	BOX IA44
	REFUSED	BOX IA44
	DON'T KNOW	BOX IA44

IA42a   **ia1itdvspamt**   R1 IA42A SP INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 SP INTEREST AND DIVIDEND INCOME 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 IA42A = 1-9999, go to BOX IA43a.

IA42b   **ia1itdvspest**   R1 IA42B EST SP INTDIV INC LS YR

QUESTION TEXT:

> SHOW CARD IA25
>
> Was it…

CODES

1	less than $200,
2	$200-$999,
3	$1,000-$3,999,
4	$4,000-$6,999, or
5	$7,000 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 IA43a.
> Otherwise, go to BOX IA44.

IA43a   **ia1itdvptamt**   R1 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 bold 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}?
>
> 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 SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME 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 IA43A = 1-9999, go to BOX IA44.

IA43b   **ia1itdvptest**   R1 IA43B ESTPRT INT DV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Was it…

CODES

1	less than $200,
2	$200-$999,
3	$1,000-$3,999,
4	$4,000-$6,999, or
5	$7,000 or more?
	REFUSED
	DON'T KNOW

BOX IA44   **BOXIA44**   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   **ia1brewrt**   R1 IA44 BUSINESS REALESTATE WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

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.

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS	IA45A
	SEPARATELY	
	REFUSED	IA44B
	DON'T KNOW	IA44B

IA44a   **ia1brejtwrt**   R1 IA44A JOINT BUS REAL WRTH

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range   1 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA44A = 1-99999999, go to BOX IA47.

IA44b   **ia1brejtest**   R1 IA44B EST JOINT BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA26

Would it be…

CODES

1	less than $30,000,	BOX IA47
2	$30,000-$151,999,	BOX IA47
3	$152,000-$367,999,	BOX IA47
4	$368,000-$956,999, or	BOX IA47
5	$957,000 or more?	BOX IA47
	REFUSED	BOX IA47
	DON'T KNOW	BOX IA47

IA45a   **ia1brespwrt**   R1 IA45A SP BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA45A = 1-99999999, go to BOX IA46a.

IA45b	**ia1brespest**	R1 IA45B EST SP BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be…

CODES

1	less than $30,000,
2	$30,000-$88,999,
3	$89,000-$295,999,
4	$296,000-$360,999, or
5	$361,000 or more?
	REFUSED
	DON'T KNOW

BOX IA46a	**BOXIA46a**	NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46a.
Otherwise, go to BOX IA47.

IA46a	**ia1breptwrt**	R1 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount. The nearest $1,000 is fine.

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA46A = 1-99999999, go to BOX IA47.

IA46b   ia1breptest   R1 IA46B EST PART BUS RE WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be…

CODES

1	less than $30,000,
2	$30,000-$88,999,
3	$89,000-$295,999,
4	$296,000-$360,999, or
5	$361,000 or more?
	REFUSED
	DON'T KNOW

BOX IA47   BOXIA47   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   ia1breiinc   R1 IA47 BUS REALESTATE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA48A
	REFUSED	IA47B
	DON'T KNOW	IA47B

IA47a   **ia1breijtamt**   R1 IA47A JOINT BUS RE INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range   1 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA47A = 1-99999999, go to BOX IA50.

IA47b   **ia1breijtest**   R1 IA47B EST JNT BUS RE INC LSYR

QUESTION TEXT:

SHOW CARD IA28

Was it…

CODES

1	less than $7,200,	IA50
2	$7,200-$16,799,	IA50
3	$16,800-$40,799,	IA50
4	$40,800-$86,399,	IA50
5	$86,400 or more?	IA50
	REFUSED	IA50
	DON'T KNOW	IA50

IA48a **ia1breispamt** R1 IA48A AMT SP BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range   1 to 99999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA48A = 1-99999999, go to BOX IA49a.

IA48b **ia1breispest** R1 IA48B EST SP BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it…

CODES

1	less than $6,000,
2	$6,000-11,999,
3	$12,000-$23,999,
4	$24,000-$47,999, or
5	$48,000 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   ia1breiptamt   R1 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. 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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

If IA49A = 1-99999999, go to BOX IA50.

IA49b   ia1breiptest   R1 IA49B EST PRT BS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it…

CODES

1	less than $6,000,
2	$6,000-11,999,
3	$12,000-$23,999,
4	$24,000-$47,999, or
5	$48,000 or more?
	REFUSED
	DON'T KNOW

IA50

ia1totinc	R1 IA50 TOTAL INCOME
ia1toincimf	R1 F IMPUTED TOTAL INC FLG
ia1toincim1-5	R1 IA50 IMPUTED TOTAL INC1-5
ia1dtoincimi1-20	R1 D IA50 IMPUTED TOTAL INC1-20 INTERVAL
ia1toincimif	R1 F IMPUTED TOTAL INC FLG INTERVAL
ia1dtoincimreas	R1 D IMPUTED TOTAL INC REASON

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1 = 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   1 to 99999999

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA50 = 1-99,999,999, go to Section CO.

BOX IA51a

BOXIA51a   NOT ON FILE

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51a.
Otherwise, go to IA51b.

IA51a

ia1toincesjt	R1 IA51A JOINT EST TOT INCOME
ia1eincimjf	R1 F IMPTD JOINT EST TOT INC FLG
ia1eincimj1	R1 IA51A IMP EST JOINT TOT INC1
ia1eincimj2	R1 IA51A IMP EST JOINT TOT INC2
ia1eincimj3	R1 IA51A IMP EST JOINT TOT INC3
ia1eincimj4	R1 IA51A IMP EST JOINT TOT INC4
ia1eincimj5	R1 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA30

Was it...

CODES

1	less than $27,600,	SECTION CO
2	$27,600-$41,999,	SECTION CO
3	$42,000-$63,999,	SECTION CO
4	$64,000-$107,999 or	SECTION CO
5	$108,000 or more?	SECTION CO
	REFUSED	SECTION CO
	DON'T KNOW	SECTION CO

IA51B

ia1toincessg	R1 IA51B SINGLE EST TOT INC
ia1eincimsf	R1 F IMPUTED SGL EST TOT INC FLG
ia1eincims1	R1 IA51B IMP EST SP SGL TOT INC1
ia1eincims2	R1 IA51B IMP EST SP SGL TOT INC2
ia1eincims3	R1 IA51B IMP EST SP SGL TOT INC3
ia1eincims4	R1 IA51B IMP EST SP SGL TOT INC4
ia1eincims5	R1 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA31

Was it...

CODES

1	less than $14,000,
2	$14,000-$21,999,
3	$22,000-$35,999,
4	$36,000-$48,999, or
5	$49,000 or more?
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Go to Section CO – Car Ownership.

CO1   **co1owncartrv**   R1 CO1 OWN ANY CARS TRUCKS VANS

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER)], display "Do you".
Otherwise, display "Does SP".

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {your/his/her} {husband/wife/partner}".
If HH1=2 (LIVING WITH A PARTNER), display "partner".
If SPOUSE GENDER=1 (MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "husband".
If SPOUSE GENDER=2 (FEMALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "wife".
If SP GENDER=1 (MALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "husband".
If SP GENDER=2 (FEMALE) and 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   **co1manyvhcls**   R1 CO2 HOW MANY VEHICLES OWN

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {your/his/her} {husband/wife/partner}".
If HH1=2 (LIVING WITH A PARTNER), display "partner".
If SPOUSE GENDER=1 (MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "husband".
If SPOUSE GENDER=2 (FEMALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display "wife".
If SP GENDER=1 (MALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "husband".
If SP GENDER=2 (FEMALE) and 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

BOX CO2

BOXCO2   NOT ON FILE

If CO2=1, go to Section EW – Economic Well-being.
Otherwise, go to CO3.

CO3

co1valuevehi   R1 CO3 VALUE HOW MUCH WOLD BRING

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		100 to 1000000
Soft Range		1000 to 40000
REFUSED		
DON'T KNOW		

PROGRAMMER INSTRUCTIONS:

Soft range: $1000-$40000
Hard range: $100-$1000000
Use input mask in response field ($ 999,999,999) so that dollar sign is displayed and commas are inserted appropriately.

If a dollar amount is given, skip to Section EW.

CO3A

co1vehivalue   R1 CO3A VEHICLE VALUE

QUESTION TEXT:

SHOW CARD CO1

Would it be...

CODES

1	less than $2,500,
2	$2,500-$4,999,
3	$5,000-$7,499,
4	$7,500-$9,999,
5	$10,000-19,999, or
6	$20,000 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   **ew1pycredbal**   R1 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 HH1 = 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   **ew1crecardeb**   R1 EW2 TOTAL CREDIT CARD DEBT

QUESTION TEXT:

SHOW CARD EW1

Adding up all credit card balances, is the amount owed....

CODES

1	less than $1,000,
2	over $1,000 but less than $2,000,
3	over $2,000 but less than $4,000,
4	over $4,000 but less than $6,000,
5	over $6,000 but less than $10,000,
6	over $10,000 but less than $20,000, or
7	$20,000 or more?
	REFUSED
	DON'T KNOW

EW3   ew1credcdmed   R1 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   ew1amtcrdmed   R1 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   ew1medpaovtm   R1 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 HH1 = 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   **ew1ampadovrt**   R1 EW6 AMT FOR MED BILL OVR TIME

QUESTION TEXT:

> SHOW CARD EW2
>
> About how much is that amount? Is it...

CODES

1	less than $500,
2	over $500 but less than $1,000,
3	over $1,000 but less than $2,000,
4	over $2,000 but less than $4,000,
5	over $4,000 but less than $6,000,
6	over $6,000 but less than $10,000,
7	over $10,000 but less than $20,000, or
8	$20,000 or more?
	REFUSED
	DON'T KNOW

EW7   **ew1finhlpfam**   R1 EW7 FINANCIAL HELP FRM FAMILY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 =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   BOXEW8   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   ew1whohelfi1   R1 EW8 CHILD HELPED FINANCIALLY

ew1whohelfi2   R1 EW8 OTHER HELPED FINANCIALLY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1 = 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

1	CHILD/CHILDREN	
2	SOMEONE ELSE	EW10
	REFUSED	EW10
	DON'T KNOW	EW10

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW9   op1chhlpfin   R1 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

EW10   **ew1atchhelyr**   R1 EW10 AMT FROM CHILDR LST YR

QUESTION TEXT:

SHOW CARD EW2

About how much was that in the last year (ending December 31, {CURRENT YEAR – 1 YEAR}}? Would you say…

CODES

1	less than $500,
2	over $500 but less than $1,000,
3	over $1,000 but less than $2,000,
4	over $2,000 but less than $4,000,
5	over $4,000 but less than $6,000,
6	over $6,000 but less than $10,000,
7	over $10,000 but less than $20,000, or
8	$20,000 or more?
	REFUSED
	DON'T KNOW

EW11   **ew1fingftfam**   R1 EW11 FINANCIAL GIFTS TO FAMLY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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	BOX EW15
	REFUSED	BOX EW15
	DON'T KNOW	BOX EW15

BOX EW12

BOXEW12   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

ew1whregoth1   R1 EW12 SP GAVE CHILD FINCL HLP

ew1whregoth2   R1 EW12 SP GAVE GRANDCHD FIN HLP

ew1whregoth3   R1 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 HH1 = 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

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

op1hlpchfin   R1 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

EW14 ew1amthlpgiv R1 EW14 AMOUNT OF HELP GIVEN

QUESTION TEXT:

SHOW CARD EW2

About how much was that in the last year? Would you say…

CODES

1	less than $500,
2	over $500 but less than $1,000,
3	over $1,000 but less than $2,000,
4	over $2,000 but less than $4,000,
5	over $4,000 but less than $6,000,
6	over $6,000 but less than $10,000,
7	over $10,000 but less than $20,000, or
8	$20,000 or more?
	REFUSED
	DON'T KNOW

BOX EW15 BOXEW15 NOT ON FILE

If FACILITY flag = 1 (YES), go to Section HL - Helpers

Otherwise, go to EW15.

EW15 ew1progneed1 R1 EW15 SP RECEIVD FOOD STAMPS

ew1progneed2 R1 EW15 SP REC OTHR FOOD ASST

ew1progneed3 R1 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 HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAMELASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Use "Same Question Stem" display.

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.

Go to Section HL – Helpers.

BOX HL1PRE   **BOXHL1PRE**   NOT ON FILE

QUESTION TEXT

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.

Else if PERSON ROSTER MEMBER 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.

Otherwise, go to HL1PRE.

HL1PRE   **HL1PRE**   NOT ON FILE

Next I have a few questions about the people who you said help {you/SP} with daily activities.

PRESS 1 AND ENTER TO CONTINUE

BOX HL1 op1ishelper R1 BXHL1 HELPS SP

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 op1helpsched R1 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 op1numdayswk R1 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	1 to 7
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:
Write # DAYSHELPWEEK response to PERSON ROSTER for roster member.

All responses go to HL4.

HL3   **op1numdaysmn**   R1 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	1 to 31
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:
Write # DAYSHELPMONTH response to PERSON ROSTER for roster member.

HL4   **op1numhrsday**   R1 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   **BOXHL5**   NOT ON FILE

If PERSON ROSTER member relationship = 2 (SPOUSE/PARTNER), go to BOX HL9.
Otherwise, go to HL5.

HL5   **op1paidhelpr**   R1 HL5 HELPER IS PAID

QUESTION TEXT:

Is {PERSON ROSTER MEMBER FIRSTNAME LASTNAME} paid to provide this help?

CODES

1	YES	
2	NO	BOXHL9
	REFUSED	BOXHL9
	DON'T KNOW	BOXHL9

PROGRAMMER INSTRUCTIONS:
Write PAIDHELP response to PERSON ROSTER for roster member.

HL6

op1sppayshlp	R1 HL6 SP PAYS FOR HELP
op1govpayhlp	R1 HL6 GOVT PAYS FOR HELP
op1inspayhlp	R1 HL6 INSUR PAYS FOR HELP
op1othpayhlp	R1 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

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

BOXHL7	NOT ON FILE

If HL6=1 (SP AND/OR FAMILY), go to HL7.
Else if HL6=2, go to HL8.
Otherwise, go to BOX HL9.

HL7

op1payunit	R1 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	HL7A
2	WEEKLY	HL7B
3	MONTHLY	HL7C
	REFUSED	BOXHL8
	DON'T KNOW	BOXHL8

PROGRAMMER INSTRUCTIONS:
Write PAYUNIT response to PERSON ROSTER for roster member.

HL7a   op1hourlypay   R1 HL7A HOURLY AMOUNT PAID

DISPLAY INSTRUCTIONS:
Collect response using dollars and cents mask ($xxx.xx)

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   op1weeklypay   R1 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   op1monthlypy   R1 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.

BOX HL8	**BOXHL8**	NOT ON FILE

If HL6=2 (GOVERNMENT PROGRAM), go to HL8.

Otherwise, go to Box HL9.

HL8	**op1progmpaid**	R1 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	BOXHL9
2	MEDICARE	BOXHL9
3	STATE PROGRAM	BOXHL9
91	OTHER (SPECIFY)	
	REFUSED	BOXHL9
	DON'T KNOW	BOXHL9

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

QUESTION TEXT:
SPECIFY OTHER PROGRAM

Text 50 char

ENTER TEXT

	Length	50

BOX HL9	**BOXHL9**	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 CC – SP and Caregiver Eligibility for National Study of Caregiving (NSOC)

Derived Variables from Items in HL Section	
op1dhrsmth	R1 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   **ls1evdayact1**   R1 LS1 EATING W OUT HELP SP EQUP

          ls1evdayact2   R1 LS1 GET IN OUT BED W OUT HELP

          ls1evdayact3   R1 LS1 GET IN OUT CHR W OUT HELP

          ls1evdayact4   R1 LS1 WALK INSIDE WITHOUT HELP

          ls1evdayact5   R1 LS1 GO OUTSDE W OUT HLP SP EQ

          ls1evdayact6   R1 LS1 DRESSING WITHOUT HELP

          ls1evdayact7   R1 LS1 BATHING WITHOUT HELP

          ls1evdayact8   R1 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

ls1ableto1	R1 LS2 PREPARE MEALS W OUT HELP
ls1ableto2	R1 LS2 LAUNDRY WITHOUT HELP
ls1ableto3	R1 LS2 SP ABLE LIGHT HOUSEWORK
ls1ableto4	R1 LS2 SHOP FOR GROC WOUT HELP
ls1ableto5	R1 LS2 SP ABLE MANAGE MONEY
ls1ableto6	R1 LS2 SP TAKE MEDS WOUT HELP
ls1ableto7	R1 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

> 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

ls1diskefrm1	R1 LS3 DIS KEEPS FROM MEAL PREP
ls1diskefrm2	R1 LS3 DIS KEEPS FROM LAUNDRY
ls1diskefrm3	R1 LS3 DIS KEEPS FRM LGHT HOUSWK
ls1diskefrm4	R1 LS3 DIS KEEPS FRM SHOP GROC
ls1diskefrm5	R1 LS3 DIS KEEPS FRM MANAGE MONY
ls1diskefrm6	R1 LS3 DIS KEEPS FROM TAKE MEDS
ls1diskefrm7	R1 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.

BOX IR1   **BOXIR1**   NOT ON FILE

> If FQ task = code 20 (COMPLETED) and NHATS Int = 24 (not required), go to IR17.
> Otherwise, go to IR1.

IR1   **IR1**   NOT ON FILE

QUESTION TEXT:

> Was the SP interview completed in person or by telephone?

CODES

1	In person	IR2
2	Telephone	

IR1a   **IR1a**   NOT ON FILE

QUESTION TEXT:

> Describe why the SP interview was conducted by telephone.

ENTER TEXT

Length	500

IR2   **ir1spattitud**   R1 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   **ir1undrstand**   R1 IR3 SP UNDERSTAND QUESTION

QUESTION TEXT:

> In general, how was the respondent's understanding of the questions?

CODES

1	Good	Box IR4
2	Fair	
3	Poor	

IR3A   **IR3A**   NOT ON FILE

QUESTION TEXT:

Describe any circumstances that may have affected SP's understanding of the questions.

ENTER TEXT

Length   500

BOXIR4   **BOXIR4**   NOT ON FILE

QUESTION TEXT:

If PROXY, flag = 1 (yes), go to IR4
Otherwise go to IR6

IR4   **ir1sppresent**   R1 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   **IR5**   NOT ON FILE

QUESTION TEXT:

Explain why the SP wasn't present for the interview.

ENTER TEXT

Length   500

IR6   **ir1intvwhlp**   R1 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	IR7	
3	Interview was conducted by telephone	IR7	

IR6A

ir1prsnhlp1	R1 IR6A SPOUSE HELPED WITH INTVW
ir1prsnhlp2	R1 IR6A CHILD HELPED WITH INTVW
ir1prsnhlp3	R1 IR6A RELATIVE HELP WITH INTVW
ir1prsnhlp4	R1 IR6A FRIEND HELPED WITH INTVW
ir1prsnhlp5	R1 IR6A STAFF HELPED WITH INTVW
ir1prsnhlp6	R1 IR6A AIDE HELPED WITH INTVW
ir1prsnhlp91	R1 IR6A OTHER HELPED WITH INTVW

QUESTION TEXT:

Select type (s) of persons who helped answer questions during the interview.

Select all the 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

IR7   **IR7**   NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the SP cognition section?

CODES
1   Yes
2   No   IR8
3   Not Administered   IR8

IR7A   **IR7A**   NOT ON FILE

QUESTION TEXT:

Describe problems or issues with SP cognitive section.

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	IR10

IR8A   IR8A   NOT ON FILE

QUESTION TEXT:

Describe problems or issues CAPI.

ENTER TEXT

Length   500

IR10   IR10   NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the performance measures?

CODES

1	Yes	
2	No	IR11
3	Not Administered	IR11

IR10A   IR8A   NOT ON FILE

QUESTION TEXT:

Describe the performance measures problems or issues

ENTER TEXT

Length   500

IR11   IR11   NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the STROOP task?

CODES

1	Yes	
2	No	IR12
3	Not Administered	IR12

IR11A   IR11A   NOT ON FILE

QUESTION TEXT:
Describe problems or issues with the STROOP task.

ENTER TEXT
Length   500

IR12   **ir1sessions**   R1 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   R12C

IR12A   **ir1sessrsn1**   R1 IR12A MORE 1 SESSION SP TIRED

                            ir1sessrsn2   R1 IR12A MORE 1 SESSION SP ILL

                            ir1sessrsn3   R1 IR12A MORE 1 SESSION SCHEDULE

                            ir1sessrsn91   R1 IR12A MORE 1 SESSION OTHER

QUESTION TEXT:
Select reason (s) for completing interview in more than 1 session.

Select all the apply

CODES
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

ir1conhomapt   R1 IR12C INTRV CONDTD AT HME/APT

QUESTION TEXT:

Was the entire interview conducted inside SP's home/apartment/unit?

CODES

1	YES	BOX IR13
2	NO	

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

ir1insidhome   R1 IR12E GO INSIDE HOME/APT/UNIT

QUESTION TEXT:

Did you go inside SP's home/apartment/unit?

CODES

1	YES
2	NO

BOXIR13

BOXIR13   NOT ON FILE

QUESTION TEXT:

If IR12C = 1 (ENTIRE INTERVIEW IN HOME) or IR12e = 1 (WENT INSIDE HOME), go to IR13.
Otherwise go to IR15.

IR13

ir1condihom1	R1 IR13 PAINT PEELING IN SP HOME
ir1condihom2	R1 IR13 PESTS IN SP HOME
ir1condihom3	R1 IR13 BROKN FURNITURE SP HOME
ir1condihom4	R1 IR13 FLOORING NEEDS REPAIR
ir1condihom5	R1 IR13 HOME OTHR RIPPING 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   **ir1clutter1**   R1 IR14 CLUTTR IN INTERVIEW ROOM

  ir1clutter2   R1 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.

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   **ir1areacond1**   R1 IR15 LITTER GLASS ON SDWLK ST

  ir1areacond2   R1 IR15 GRAFFITI ON BUILDG WALLS

  ir1areacond3   R1 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-d 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-d]}

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?
RESPONSE [4] d. Houses with foreclosure signs?

CODES

1	None
2	A little
3	Some
4	A lot

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.

IR16   **ir1condhome1**   R1 IR16 BROKEN WINDOWS IN HOME

ir1condhome2   R1 IR16 CRUMBLNG FOUNDTN IN HOME

ir1condhome3   R1 IR16 MISSING BRCKS SIDNG IN HM

ir1condhome4   R1 IR16 ROOF PROBLEM IN HOME

ir1condhome5   R1 IR16 BROKEN STEPS TO HOME

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-e ITEMS WHEN ANSWERING THESE QUESTIONS

{[}Standing in front of the SP's home/building, did it have…{]}

{variable text [a-e]}

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?

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-D sequence until all rows have been displayed.

BOXIR19   **BOXIR19**   NOT ON FILE

QUESTION TEXT:

If FQ task = code 20 (COMPLETED), go to IR19.
Otherwise END

IR19   **IR19**   NOT ON FILE

QUESTION TEXT:

Were there any problems or issues administering the Facility Questionnaire?

CODES

1	YES	
2	NO	IR20

IR19A   **IR19A**   NOT ON FILE

QUESTION TEXT:

Describe problems or issues with administering the Facility Questionnaire.

ENTER TEXT

Length		500

IR20   **IR20**   NOT ON FILE

QUESTION TEXT:

Was more than 1 facility respondent needed to complete the Facility Questionnaire?

CODES

1	YES	
2	NO	IR21

IR20A   **IR20A**   NOT ON FILE

QUESTION TEXT:

Describe why more than 1 facility respondent need to complete the Facility Questionnaire.

ENTER TEXT

Length   500

IR21   **ir1fqphrnprsn**   R1 IR21 FQ IN PERSON OR BY PHONE

QUESTION TEXT:

Was the Facility Questionnaire completed in person or by telephone?

CODES

1   In person
2   By Phone

FQ1PRE   **FQ1PRE**   NOT ON FILE

QUESTION TEXT

> YOU HAVE SELECTED THE FACILITY STAFF QUESTIONNAIRE (FQ) FOR CASE {CASE ID}, {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

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	

FQ1NotRec   **FQ1NotRecord**   NOT ON FILE

QUESTION TEXT:

> 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

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?]
>
>   CONFIRM SPELLING
>
>   IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

ENTER TEXT

>   Length   25

FQ3c   **fq1facadcity**   R1 FQ3C FAC ADDRESS CITY

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   **fq1facadstat**   R1 FQ3D FACIL ADDRESS STATE

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

PROGRAMMER INSTRUCTIONS:
     Use lookup file of state names.

FQ3e   **fq1facaddzip**   R1 FQ3E FAC ADDRESS ZIP CODE

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

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

FQ4 FQ4 NOT ON FILE

QUESTION TEXT:

> What is your email address here?
>
> ENTER 97 IF NO 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 or levels of care in this place, please tell me the name for the whole place.

ENTER TEXT

Length 75

FQ6 **fq1dfacdescr** R1 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 **fq1dosfacd** R1 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 **fq1prtlivnam** R1 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 **fq1dfacarea** R1 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?

CODES

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
fq1dosfaca   R1 FQ10A OTHER SPECIFY FAC AREA

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length   50

PROGRAMMER INSTRUCTIONS:
Go to FQ12

FQ11
fq1assdnrsng   R1 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
fq1othrlevls   R1 FQ12 OTH LEVELS OF CARE AVAIL

QUESTION TEXT:

Besides where {SP} lives, are there other levels of care available at {PLACE NAME FROM 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
fq1whotlevl1   R1 FQ13 INDEPNDNT LIV CARE AVAIL

fq1whotlevl2   R1 FQ13 ASSISTED LVNG CARE AVAIL

fq1whotlevl3   R1 FQ13 ALZHEIMER CARE AVAIL

fq1whotlevl4   R1 FQ13 NURSING HOME CARE AVAIL

fq1whotlevl5   R1 FQ13 OTHR SPECIFY CARE AVAIL

QUESTION TEXT:

What other levels of care are available?

SELECT ALL THAT APPLY

CODES

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

fq1servaval1	R1 FQ15 MEALS AVAIL
fq1servaval2	R1 FQ15 HELP WITH MEDS AVAIL
fq1servaval3	R1 FQ15 HELP W BATH DRESS AVAIL
fq1servaval4	R1 FQ15 LAUNDRY SERVCS AVAIL
fq1servaval5	R1 FQ15 HOUSEKEEPING SERV AVAIL
fq1servaval6	R1 FQ15 TRANSPRT MED CARE PROV
fq1servaval7	R1 FQ15 TRANSPRT TO STORE EVENT
fq1servaval8	R1 FQ15 RECREATIONAL FAC AVAIL
fq1servaval9	R1 FQ15 SOCIAL EVENTS 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-i]}

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. Recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE[9] i. Organized social events and activities?

CODES

1	YES, SERVICE PROVIDED AS PART OF PACKAGE
2	YES, SERVICE PROVIDED AT AN EXTRA CHARGE
3	NO, SERVICE NOT PROVIDED
	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.

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

fq1paysourc1	R1 FQ16 SP OR SP FAMILY PAYMENT
fq1paysourc2	R1 FQ16 SOC SEC SSI PAYMENT
fq1paysourc3	R1 FQ16 MEDICAID PAYMENT
fq1paysourc4	R1 FQ16 MEDICARE PAYMENT
fq1paysourc5	R1 FQ16 PRIVATE INSURANCE PAYMNT
fq1paysourc6	R1 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	0 to 26000
Soft Range	0 to 10000
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.

Hard range error 13 "VALUE OUT OF RANGE. VERIFY WITH RESPONDENT AND RE-ENTER ANSWER."
Soft range error "UNLIKELY RESPONSE - PLEASE VERIFY WITH RESPONDENT. SUPPRESS TO ACCEPT RESPONSE
AND CONTINUE. OTHERWISE, CLOSE TO RE-ENTER ANSWER."

BOX FQ17   **BOXFQ17**   NOT ON FILE

If DK or RF entered at FQ16 for any amount category, go to FQ19.

Otherwise, go to FQ17.

FQ17   **fq1totalpaym**   R1 FQ17 TOTAL PAYMENT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using commas 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   **fq1tmnthlyamt**   R1 FQ18 TOT MTHLY AMT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using commas to separate zeroes.

QUESTION TEXT:

What is the (approximate) total monthly amount for {SP}'s care?

ENTER AMOUNT

ENTER NUMBER

Range		0 to 26000
REFUSED		
DON'T KNOW		

FQ19 **fq1primpayer** R1 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 **fq1govsource** R1 FQ20 GOVERNMENT SOURCE

QUESTION TEXT:

Is that a government source?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

FQ21 FQ21 NOT ON FILE

YOU HAVE COMPLETED THE FACILITY STAFF QUESTIONNAIRE. THANK RESPONDENT.

PRESS 1 AND ENTER TO CONTINUE

FQ22 FQ22 NOT ON FILE

DISPLAY INSTRUCTIONS:

If FQ6 = 1 or [(FQ6 = 2 or 3 or 4 or 8 or 91 or DK or RF) and FQ10 = 4] or FQ11 = 2, set FACILITY TYPE flag = 1

(NURSING HOME), and display "SP HAS BEEN IDENTIFIED AS LIVING IN A NURSING HOME. NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE."

QUESTION TEXT:

> {SP HAS BEEN IDENTIFIED AS LIVING IN A NURSING HOME.
>
> 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.
Write FACILITY NAME to Management file for use in the NHATS Int task and the IRQ.

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)

If FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Int Task=code 24 (FINAL NOT REQUIRED) and Stroop Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".

If FQ11 = 1, set FACILITY TYPE flag = 2 (OTHER FACILITY)
If FQ6 = 5 or 6 or 7, set FACILITY TYPE flag = 2 (OTHER FACILITY)
If [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) AND (FQ10 = 1 or 2 or 91)] OR [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) AND FQ10 = 3 AND (FQ11 = DK or RF)] OR [(FQ6 = 2 or 3 or 4 or 8 or 91) AND (FQ10 = RF or DK)], set FACILITY TYPE flag = 2 (OTHER FACILITY)

If FACILITY TYPE flag = 1 or 2, set FACILITY flag = 1 (YES)

Write FACILITY TYPE flag and FACILITY flag to Management file for use in the NHATS Int task and the IRQ.

Our records indicate the information below for {SP FIRST NAME} {SP MIDDLE NAME} {SP LAST NAME}.

If this information is INCORRECT, please fill in the correct information below and return this letter to Westat in the enclosed postage-paid return envelope. If this information is CORRECT, you do not need to return this letter.

Corrected information:

Date of Birth: {DOB} _____

Gender: {Gender} _____

Race: {Race} _____

Derived Variables from the FQ Section	
fq1dlocsp	R1 D FQ6 6A 10 10A FOR SAMP WGT