

NHATS Round 5

Section IS [INTERVIEW SETUP]

Sequence: 1

IS1 IS1 NOT ON FILE

Display Instructions:

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

QUESTION TEXT:

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

IF THIS IS CORRECT, PRESS 1 AND ENTER TO CONTINUE

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

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

IS2 is5resptype R5 IS2 TYPE OF RESPONDENT
op5proxy R5 IS2 PROXY

QUESTION TEXT:

SELECT TYPE OF RESPONDENT

CODES

1	SAMPLE PERSON (SP)	BOX IS2C
2	PROXY	

PROGRAMMER INSTRUCTIONS:

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

IS2A is5reasnprx1 R5 IS2A PROXY REAS SP DEMENTIA
is5reasnprx2 R5 IS2A PROXY REAS SP ILL
is5reasnprx3 R5 IS2A PRXY REAS SP SPCH IMPAIR
is5reasnprx4 R5 IS2A PRXY REAS SP HEAR IMPAIR
is5reasnprx5 R5 IS2A PROXY REAS LANG BARRIER
is5reasnprx6 R5 IS2A PROXY REAS TEMP UNAVAIL
is5reasnprx7 R5 IS2A PROXY REAS DECEASED
is5reasnprx9 R5 IS2A PROXY REAS OTHER

QUESTION TEXT:

SPECIFY REASON FOR PROXY

SELECT ALL THAT APPLY

CODES

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

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

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

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

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

IS2B**IS2B**

NOT ON FILE

QUESTION TEXT:

SPECIFY REASON FOR PROXY

ENTER TEXT

Length

50

PROGRAMMER INSTRUCTIONS

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

Otherwise, go to BOX IS2C

IS2B2**is5tempres**

R5 IS2B2 TEMPORARY RESIDENCE

QUESTION TEXT:

SPECIFY WHERE SP IS TEMPORARILY RESIDING

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

CODES

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

IS2B3**IS2B3**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PLACE SP IS TEMPORARILY RESIDING.

ENTER TEXT

BOX IS2C**BOX IS2C****NOT ON FILE**

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

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

ELSE GO TO IS2C.

IS2C**IS2C****NOT ON FILE****DISPLAY INSTRUCTIONS:**

DO NOT DISPLAY RESPONSE CODES AND LABELS

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

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

CODES

1	CONSENT TO RECORDING	IS3
7	REFUSE CONSENT TO RECORD	IS2D

PROGRAMMER INSTRUCTIONS:

IF IS2C=1 (OK TO RECORD), SET AUDIORECORDING FLAG=1 (YES).

IF RESPONDENT TYPE AT IS2=1 (SP), SET SPAUDIOASSENT FLAG=1 (YES).

IF RESPONDENT TYPE AT IS2=2 (PROXY), SET PROXYAUDIOASSENT FLAG=1 (YES).

ELSE IF IS2C=7 (REFUSED TO RECORD), SET AUDIORECORDING FLAG =2 (NO).

IF RESPONDENT TYPE AT IS2=1 (SP), SET SPAUDIOASSENT FLAG = 2 (NO).

IF RESPONDENT TYPE AT IS2=2 (PROXY), SET PROXYAUDIOASSENT=2 (NO).

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

IS2D**IS2D****NOT ON FILE****QUESTION TEXT:**

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

PRESS 1 AND ENTER TO CONTINUE

IS3**IS3****NOT ON FILE****DISPLAY INSTRUCTIONS:**

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

Otherwise, display "is".

QUESTION TEXT:

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

SPELL OUT SP'S NAME. CONFIRM SPELLING.

CODES

1	YES	BOX IS4
2	NO	

PROGRAMMER INSTRUCTIONS:

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

IS3A

IS3A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP name in the response fields.

Display "FIRST" in bold underlined text.

Display SP first name in fill as bold underlined.

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

QUESTION TEXT:

What {is/was} the correct spelling of {your/SP's} full name?

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

CORRECT FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

45

PROGRAMMER INSTRUCTIONS:

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

IS3B

IS3B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "MIDDLE" in bold underlined text.

Display SP middle name in fill as bold underlined.

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

QUESTION TEXT:

What {is/was} the correct spelling of {your/SP's} full name?

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

CORRECT MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENTER TEXT

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.

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

QUESTION TEXT:

What {is/was} the correct spelling of {your/SP's} full name?

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

CORRECT LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

BOX IS4

BOXIS4

NOT ON FILE

QUESTION TEXT:

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

IS4

r5dgender

R5 D GENDER OF SP

QUESTION TEXT:

THE SP IS LISTED AS A {MALE/FEMALE}

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK: {Are you/Is SP} male or female?

CODE

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

BOX IS4A

BOXIS4A

NOT ON FILE

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

IS4A

IS4A

NOT ON FILE

QUESTION TEXT:

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

CODE

1 YES

2 NO

IS4

PROGRAMMER INSTRUCTIONS:

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

IS6

r5dbirthmth (Sensitive)

R5 D BIRTH MONTH OF SP

r5dbirthyr (Sensitive)

R5 D BIRTH YEAR OF SP

DISPLAY INSTRUCTIONS:

Display preloaded DOB from CMS in the response field.

QUESTION TEXT:

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

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

PROGRAMMER INSTRUCTIONS:

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

MONTH range: 1-12

DAY range: 1-31

YEAR range: (CURRENT YEAR-65) - (CURRENT YEAR-110)

IS7

r5dintvwage (Sensitive)

R5 D AGE OF SP AT INTERVIEW

r5d2intvwage

R5 D SP CAT AGE AT INTVW

DISPLAY INSTRUCTIONS:

COMPUTE AGE AS (CURRENT DATE – IS6 DOB).

QUESTION TEXT:

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

CODES

1 YES

2 NO

IS6

PROGRAMMER INSTRUCTIONS:

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

BOX IS8**BOX IS8**

NOT ON FILE

Write SP name (preloaded or if corrected at IS3a-c) to the PERSON ROSTER.

If NEW SAMPLE flag =1, write SP DOB (from IS6) and calculated age from IS7 and SP gender (from IS4) to the PERSON ROSTER and set relationship to SP = 1 (SAMPLE PERSON).

If NEW SAMPLE flag = 1 (YES) and IS2=2 (PROXY), go to IS8A.

Else, if IS2= 2(PROXY), go to IS8.

Otherwise, go to Section RE - Residence.

IS8**IS8**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display "NOT ON LIST" as first roster option.

QUESTION TEXT:

What is your name?

CHOOSE PERSON FROM LIST.

PROGRAMMER INSTRUCTIONS:

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

Otherwise, go to IS8A.

IS8A**IS8A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in bold underlined text.

QUESTION TEXT:

What is your full name?

ENTER FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

45

PROGRAMMER INSTRUCTIONS:

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

Write ROSTER MEMBER to next open position on PERSON ROSTER.

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

IS8B**IS8B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "middle" in bold underlined text.

QUESTION TEXT:

ENTER MIDDLE NAME. CONFIRM SPELLING.

PRESS ENTER IF NO MIDDLE NAME OR INITIAL.

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

Allow empty.

IS8C

IS8C

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in bold underlined text.

QUESTION TEXT:

ENTER LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

IS9

is5prxyrelat

R5 PROXY RELATIONSHIP TO SP

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display PROXY RELATIONSHIP CODE LIST.

QUESTION TEXT:

How are you related to {SP}?

IF NEEDED: Are you {his/her}.....?

CODE RELATIONSHIP OF PROXY TO SP

PRESS F1 FOR HELP SCREEN

CODES

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

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

PROGRAMMER INSTRUCTIONS:

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

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

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

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

If IS9 = 91 or 92, go to IS9a.

Otherwise, GO TO IS10.

IS9A	IS9A	NOT ON FILE
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QUESTION TEXT:

SPECIFY RELATIONSHIP OF PROXY TO {SP}

ENTER TEXT

Length

50

IS10	is5prxygender	R5 IS10 PROXY GENDER
	op5dgender	R5 D GENDER UPDATE AND NEW

QUESTION TEXT:

CODE GENDER OF PROXY

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK: Are you male or female?

CODES

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

BOX IS11**BOX IS11**

NOT ON FILE

Write PROXY relationship and gender to PERSON ROSTER.

IS11**is5famrrutin**

R5 IS11 FAMILRTY SP DAILY ROUTIN

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

BOX IS11A**BOX IS11A**

NOT ON FILE

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

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

Otherwise, go to IS11A.

IS11A**is5proxlivsp**

R5 IS11A PROXY LIVES W SP

op5prsninh

R5 OP IN HOUSEHOLD UPDATE AND NEW

QUESTION TEXT:

Do you live here with {SP}?

CODES

- | | |
|---|---------|
| 1 | YES |
| 2 | NO |
| | REFUSED |

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If IS11A = 1 (YES), set INHOUSEHOLD flag = 1 (YES) for PROXY PERSON.

BOX IS12A

BOX IS12A

NOT ON FILE

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

Otherwise, go to Section RE – Residence.

IS12A

op5birthmth (Sensitive)

R5 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

Display “MONTH” in underline text.

QUESTION TEXT:

What is your date of birth?

ENTER MONTH

ENTER NUMBER

Range

1 to 12

Soft Range

1 to 12

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Display IS12A, IS12B, and IS12c on the same screen.

IS12B

IS12B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display “DAY” in underline text.

QUESTION TEXT:

[What is your date of birth?]

ENTER DAY

ENTER NUMBER

Range

1 to 31

Soft Range

1 to 31

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Display IS12A, IS12B, and IS12c on the same screen.

IS12C

op5birthyear(Sensitive)

R5 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

Display “YEAR” in underline text.

QUESTION TEXT:

[What is your date of birth?]

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Display IS12A, IS12B, and IS12C on the same screen.

Hard range: CURRENT YEAR - 110.

Soft range: (CURRENT YEAR - 20) - (CURRENT YEAR - 75).

If IS12C violates hard range, display error message "YEAR OF BIRTH OUTSIDE OF RANGE. VERIFY WITH RESPONDENT AND RE-ENTER."

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

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

Otherwise, go to IS14.

IS13**op5age (Sensitive)**

R5 OTH PERSON AGE UPDATE AND NEW

op5dage

R5 D OP CAT AGE UPDATE AND NEW

DISPLAY INSTRUCTIONS:

For "CALCULATED AGE", display age computed at IS12.

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

If IS13 = 1 (YES), write PERSON AGE to PERSON ROSTER.

If IS13 = 2 (NO), display error message, "PLEASE ENTER THE CORRECT DATE."

IS14**op5age (Sensitive)**

R5 OTH PERSON AGE UPDATE AND NEW

op5dage

R5 D OP CAT AGE UPDATE AND NEW

QUESTION TEXT:

How old are you?

ENTER AGE

ENTER NUMBER

Range	18 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 18-110.

If IS14 violates hard range, display error message "AGE OUTSIDE OF RANGE. VERIFY WITH RESPONDENT AND RE-ENTER."

Write PERSON AGE to PERSON ROSTER.

Go to Section RE – Residence.

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

NHATS Round 5

Section RE [RESIDENCE]

Sequence: 2

RE3 RE3 NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Otherwise, display “lives”.

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

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

QUESTION TEXT:

Now I need to confirm {your/SP's} address {at the time {he/she} died}. According to our records, {you live}/{he/she} {lives/lived} at [READ ADDRESS BELOW]

CONFIRM SPELLING

{Facility Name}

{Address 1}

{Address 2}

{City}, {State} {Zip}

IF COMPLETE ADDRESS NOT DISPLAYED, ENTER 2.

[Is that correct?]

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Write confirmed Address 1, Address 2, City, State, and Zip fields to the PERSON ROSTER for SP.

IMS will pull confirmed Address 1, Address 2, City, State, and Zip fields from NHATS Interview Task once task status = 20 (COMPLETE).

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

BOX RE4 BOX RE4 NOT ON FILE

If RE3 = 1 (YES), go to BOX RE4F

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

Otherwise, go to RE4a.

RE4 RE4 NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display preloaded LAST INT facility name.

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

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

Display "facility name" as underlined text.

QUESTION TEXT:

What was {SP}'s facility name at the time {he/she} died?

CONFIRM SPELLING.

IF NO FACILITY NAME, ENTER 95.

{Facility Name}

{Address 1}

{Address 2}

{City}, {State} {Zip}

ENTER TEXT

Length

75

RE4A

RE4A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text.

Display preloaded address line 1 in the response field if available.

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

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

Display "address" as underlined text.

Display preloaded SP address in the question text.

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

Otherwise, display "is".

QUESTION TEXT:

What {is/was} address {at the time {he/she} died?

CONFIRM SPELLING.

{Address 1}

{Address 2}

{City}, {State} {Zip}

ENTER TEXT

Length

50

RE4B

RE4B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text

Display preloaded address line 2 in the response field if available

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

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

Display "address" as underlined text

Display preloaded SP address in the question text.

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

Otherwise, display "is".

QUESTION TEXT:

[What {is/was} {your/SP's} address {at the time {he/she} died}?]

CONFIRM SPELLING.

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE.

{Address 1}

{Address 2}

{City}, {State} {Zip}

ENTER TEXT

Length

50

PROGRAMMER INSTRUCTIONS:

Allow empty

RE4C

re5spadrscity (Restricted)

R5 RE SP ADDRESS CITY

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text

Display preloaded city in the response field if available.

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

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

Display "city" as underlined text.

Display preloaded SP address in the question text.

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

Otherwise, display "is".

QUESTION TEXT:

[What {is/was} {your/SP's} city {at the time {he/she} died}?]

CONFIRM SPELLING

{Address 1}

{Address 2}

{City}, {State} {Zip}

ENTER TEXT

Length

25

RE4D

re5spadrstt (Restricted)

R5 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.

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

Otherwise, display "is".

QUESTION TEXT:

[What {is/was} {your/SP's} state {at the time {he/she} died}?]

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

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

ENTER TEXT

Length

2

PROGRAMMER INSTRUCTIONS:

Use lookup file (51STATE) of state names.

RE4E

re5spadrsize (Restricted)

R5 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 {Zip} fields as lighter "grayed out" text.
Display "zip code" as underlined text.

Display preloaded SP address in the question text.

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

QUESTION TEXT:

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

ENTER A 5-DIGIT ZIP CODE

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

ENTER TEXT

Length

5

PROGRAMMER INSTRUCTIONS:

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

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

BOX RE4F

BOX RE4F

NOT ON FILE

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

RE4F

re5spadrnew

R5 RE4F SP ADDRESS SAME OR DIFF

DISPLAY INSTRUCTIONS:

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

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

Display current and last address fields in 2 columns.

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

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

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

QUESTION TEXT:

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

CURRENT ADDRESS:

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

ADDRESS AT LAST INTERVIEW:

{LAST INT Facility Name}
{LAST INT Address 1}
{LAST INT Address 2}
{LAST INT City}, {LAST INT State} {LAST INT Zip}

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

ENTER₁ IF SAME ADDRESS.

ENTER₂ IF DIFFERENT ADDRESS, INCLUDING A DIFFERENT APT# OR UNIT #.

ENTER₃ IF SAME ADDRESS WITH MINOR ADDRESS CORRECTIONS (SPELLING, ZIP CODE, FACILITY NAME)

CODES

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

PROGRAMMER INSTRUCTIONS:

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

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

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

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

BOX RE5

BOX RE5

NOT ON FILE

QUESTION TEXT:

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

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

Otherwise, go to RE5.

RE5 **RE5** NOT ON FILE

QUESTION TEXT:

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

CODES

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

RE6A **RE6A** NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length 50

RE6B **RE6B** NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM SPELLING

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

Allow empty

RE6C **RE6C** NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length 25

RE6D

RE6D

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display “state” as underlined text.

QUESTION TEXT:

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

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

ENTER TEXT

Length

2

PROGRAMMER INSTRUCTIONS:

Use lookup file (51 STATE) of state names.

RE6E

RE6E

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display RE6a, 6b, 6c, 6d, and 6e on the same screen
Display “zip code” as underlined text.

QUESTION TEXT:

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

ENTER A 5-DIGIT ZIP CODE

ENTER TEXT

Length

5

PROGRAMMER INSTRUCTIONS:

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

RE7

re5intplace

R5 RE7 SP INT AT PLACE OF RES

DISPLAY INSTRUCTIONS:

For CURRENT ADDRESS, if RE3 = 1 (YES), display updated IMS Facility Name, Address 1, Address 2, City, State, Zip.

Otherwise, display updated Address 1, Address 2, City, State, and Zip fields from RE4a-e.

QUESTION TEXT:

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

CURRENT ADDRESS:

{Facility Name}

{Address 1}

{Address 2}

{City}, {State} {Zip}

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

CODES

1 YES

2 NO

PROGRAMMER INSTRUCTIONS:

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

BOX RE8**BOX RE8**

NOT ON FILE

QUESTION TEXT:

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

Otherwise, go to RE8.

RE8**re5newstrct**

R5 RE8 NEW RESID PHYS STRUC IN R2

re5dresistrct

R5 D RESIDNCE PHYSICAL STRUCTUR

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

{SHOWCARD RE1}

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

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

RE8A**RE8A**

NOT ON FILE

QUESTION TEXT:

SPECIFY TYPE OF STRUCTURE

ENTER TEXT

Length

25

RE9**re5newblgfl**

R5 RE9 NEW RESID BLDG FLOORS IN R5

re5dbldg

R5 D SP BLDG MORE THAN ONE FLOOR

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

CODES

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

BOX RE10**BOX RE10**

NOT ON FILE

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

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

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

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

Otherwise, go to Section HC – Health Conditions.

RE10**re5mthmove**

R5 RE10 MONTH MOVED NEW ADDRESS

QUESTION TEXT:

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

ENTER MONTH

CODES

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

BOX RE11

BOX RE11

RE10B**re5yearmove**

R5 RE10B YEAR MOVED NEW ADDRESS

QUESTION TEXT:

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

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

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

BOX RE11

BOX RE11

NOT ON FILE

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

Otherwise, go to Section HC – Health Conditions.

RE11

re5placedec

R5 RE11 CARE AT PLACE SP DIED

QUESTION TEXT:

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

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

RE12

re5alonedec

R5 RE12 LIVED ALONE AT DEATH

QUESTION TEXT:

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

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section PD – Place of Death.

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

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

NHATS Round 5

Section HC [HEALTH CONDITIONS]

Sequence: 3

HC1PRE

HC1PRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HC1

hc5health

R5 HC1 OVERALL HEALTH CONDITION

QUESTION TEXT:

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

CODES

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

HC2

hc5disescn1

R5 HC2 SP HAD HEART ATTACK

hc5disescn2

R5 HC2 SP HAS HEART DISEASE

hc5disescn3

R5 HC2 SP HAS HIGH BLOOD PRESS

hc5disescn4

R5 HC2 SP HAS ARTHRITIS

hc5disescn5

R5 HC2 SP HAS OSTEOPOROSIS

hc5disescn6

R5 HC2 SP HAS DIABETES

hc5disescn7

R5 HC2 SP HAS LUNG DISEASE

hc5disescn8

R5 HC2 SP HAD STROKE

hc5disescn9

R5 HC2 SP HAS DEMENTIA OR ALZH

hc5disescn10

R5 HC2 SP HAS CANCER

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

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

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

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

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

Always display HC2a, HC2h, and HC2j.

QUESTION TEXT:

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

{variable text [a-j]}

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

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

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

RESPONSE [4] d. arthritis (including osteo or rheumatoid arthritis)?

RESPONSE [5] e. osteoporosis or thinning of the bones?

RESPONSE [6] f. diabetes?

RESPONSE [7] g. lung disease, such as emphysema, asthma, or chronic bronchitis?

RESPONSE [8] h. a stroke?

RESPONSE [9] i. dementia or Alzheimer’s Disease?

RESPONSE [10] j. cancer

CODES

1	YES
2	NO
7	PREVIOUSLY REPORTED
	REFUSED
	DON’T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

Do not display response code 7 (PREVIOUSLY REPORTED).

If LAST INT HC2b, c, d, e, f, g, or i = 1 (YES), set corresponding CURRENT INT variable = 7 (PREVIOUSLY REPORTED).

BOX HC3

BOXHC3

NOT ON FILE

QUESTION TEXT:

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

HC3

hc5cancerty1

R5 HC3 SP HAD SKIN CANCER

hc5cancerty2 (Sensitive)

R5 HC3 SP HAD BREAST CANCER

hc5cancerty3 (Sensitive)

R5 HC3 SP HAD PROSTATE CANCER

hc5cancerty4 (Sensitive)

R5 HC3 SP HAD BLADDER CANCER

hc5cancerty5 (Sensitive)

R5 HC3 SP HAD CRV OVRN UTRN CNCR

hc5cancerty6 (Sensitive)

R5 HC3 SP HAD COLON CANCER

hc5cancerty7 (Sensitive)

R5 HC3 SP HAD KIDNEY CANCER

hc5cancerty8 (Sensitive)

R5 HC3 SP HAD OTHER CANCER

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES

Code All That Apply

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

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

HC3B

HC3B

NOT ON FILE

QUESTION TEXT:

SPECIFY TYPE OF CANCER

IF NEEDED: What type of cancer was this?

ENTER TEXT

Length	25
REFUSED	
DON'T KNOW	

HC5

hc5brokebon1

R5 HC5A SP BROKEN OR FRACT HIP

hc5brokebon2

R5 HC5B SP OTHR BRKN FRACT BONE

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

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

Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1 (YES), display "Since age 50"

Otherwise, display "Since the time of the last interview in {LAST INT MONTH AND YEAR}"

QUESTION TEXT:

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

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

{variable text [a-b]}

RESPONSE [1] a. a broken or fractured hip?

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

BOX HC6

BOX HC6

NOT ON FILE

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

Otherwise, go to HC7.

HC6

hc5serdisill

R5 HC6 SP OTHR SER DIS ILLNES

QUESTION TEXT:

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

CODES

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

HC6A

HC6A

NOT ON FILE

QUESTION TEXT:

What is that (serious disease or illness)?

ENTER TEXT

Length	75
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Field length 75.

HC7

hc5hospstay

R5 HC7 SP HOSP STAY LAST 12MOS

DISPLAY INSTRUCTIONS:

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

Otherwise, display “since the time of the last interview in {LAST INT MONTH AND YEAR}

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

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

CODE

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

PROGRAMMER INSTRUCTIONS:

Display month as word.

HC8	hc5hosovrnht	R5 HC8 SP NUM OF HOSP STAYS
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DISPLAY INSTRUCTIONS:

If NEWSAMPLE flag = 1 (YES), display “(in the last 12 months)”.

Otherwise, display “since the time of the last interview in {LAST INT MONTH AND YEAR}”.

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

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

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Numeric field length 3.

Hard range 1-365

Soft range 1-12

HC9PRE	HC9PRE	NOT ON FILE
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DISPLAY INSTRUCTIONS:

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

Otherwise, use null display.

QUESTION TEXT:

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

Press 1 AND ENTER TO CONTINUE

BOX HC9

BOXHC9

NOT ON FILE

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

HC9A

hc5kneesurg

R5 HC9A HAD KNEE SURGERY

QUESTION TEXT:

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

IF NEEDED: Knee surgery includes knee repair or replacement.

Knee repair or replacement?

CODES

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

HC9B

hc5knesrgyr

R5 HC9B KNEE SURGERY IN 12 MNTHS

DISPLAY INSTRUCTIONS:

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

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

Spell out month name in question text.

QUESTION TEXT:

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

IF NEEDED: Knee surgery includes knee repair or replacement.

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOXHC9c

BOXHC9c

NOT ON FILE

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

HC9C

hc5ageknesur

R5 HC9C AGE AT LAST KNEE SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range 18 to 110
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range 18-110

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

HC10A**hc5hipsurg****R5 HC10A HIP REPAIR OR REPLACMNT****QUESTION TEXT:**

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

CODES

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

HC10B**hc5hipsgyr****R5 HC10B HIP SURG IN 12 MNTHS****DISPLAY INSTRUCTIONS:**

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

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

Spell out month name in question text.

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOXHC10C**BOXHC10C****NOT ON FILE**

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

HC10C**hc5agehipsurg**

R5 HC10C AGE AT LAST HIP SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range

40 to 110

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range 40-110

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

HC11A**hc5catarsurg**

R5HC11A HAD CATARACT SURGERY

QUESTION TEXT:

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

CODES

1

YES

2

NO

HC12A

REFUSED

HC12A

DON'T KNOW

HC12A

HC11B**hc5catrsrgyr**

R5 HC11B CATER SURG IN 12 MNTHS

DISPLAY INSTRUCTIONS:

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

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

Spell out month name in question text.

QUESTION TEXT:

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

CODES

1

YES

2 NO
REFUSED
DON'T KNOW

BOXHC11C

BOXHC11C

NOT ON FILE

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

HC11C

hc5agecatsur

R5 HC11C AGE AT LAST CATRCT SURG

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range
REFUSED
DON'T KNOW

40 to 110

PROGRAMMER INSTRUCTIONS

Range 40-110

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

HC12A

hc5bckspnsur

R5 HC12A HAD BACK OR SPINE SURGR

QUESTION TEXT:

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

CODES

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

HC12B

hc5backsrgr

R5 HC12B BCK SPNE SURGR 12 MNTHS

DISPLAY INSTRUCTIONS:

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

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

Spell out month name in question text.

QUESTION TEXT:

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

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

CODES

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

BOXHC12C

BOXHC12C

NOT ON FILE

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

HC12C

hc5agebcksg

R5 HC12C AGE AT LAST BACK SURG

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range	20 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS

Range 20-110

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

HC13A

hc5heartsurg

R5 HC13A HAD HEART SURGERY

QUESTION TEXT:

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

CODES

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

HC13B

hc5hartsrgyr

R5 HC13B HEART SURGERY 12 MONTHS

DISPLAY INSTRUCTIONS:

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

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

Spell out month name in question text.

QUESTION TEXT:

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

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

CODES

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

BOXHC13C**BOXHC13C**

NOT ON FILE

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

HC13C**hc5agehrtsrg**

R5 HC13C AGE LAST HEART SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS

Hard range 1-110

Soft range 20-80

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

HC14PRE**HC14PRE**

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HC14**hc5fllsinmth**

R5 HC14 FALL DOWN IN LAST MONTH

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

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

HC15**hc5worryfall**

R5 HC15 WORRIED ABOT FALLING DOWN

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

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

HC16**hc5worrylimt**

R5 HC16 WORRY EVR LIMT ACTIVITIES

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

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

BOX HC17**BOX HC17**

NOT ON FILE

QUESTION TEXT:

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

HC17**hc5faleninyr**

R5 HC17 FALLEN DOWN IN 12 MONTHS

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

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

CODES

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

HC18

hc5multifall

R5 HC18 FALLEN DWN MORE THN ONCE

DISPLAY INSTRUCTIONS:

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

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HC19

hc5depresan1

R5 HC19A SP LITTLE INTERST PLEAS

hc5depresan2

R5 HC19B SP DOWN DEPRES HOPELESS

hc5depresan3

R5 HC19C SP NERVOUS ANXIOUS

hc5depresan4

R5 HC19D SP UNABLE TO STOP WORRY

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

QUESTION TEXT:

SHOW CARD HC1

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

{variable text [a-d]}

RESPONSE [1] a. had little interest or pleasure in doing things?

RESPONSE [2] b. felt down, depressed, or hopeless?

RESPONSE [3] c. felt nervous, anxious, or on edge?

RESPONSE [4] d. been unable to stop or control worrying?

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

HC20PRE**HC20PRE**

NOT ON FILE

QUESTION TEXT:

The next few questions are about how {you have/SP has} been sleeping.

PRESS 1 AND ENTER TO CONTINUE

HC20**hc5aslep30mn**

R5 HC20 OVER 30 MIN FALL ASLEEP

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

SHOW CARD HC2

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

CODES

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

HC21**hc5trbfalbck**

R5 HC21 TROUBLE FALLING BACK 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 |

HC22**hc5sleepmed**

R5 HC22 OFTN MEDICATE HELP SLEEP

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

SHOW CARD HC3

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section HT – HOUSING TYPE

NHATS Round 5

Section	HT	[HOUSING TYPE]	Sequence: 4
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BOX HT1	BOX HT1	NOT ON FILE
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If NEWSAMPLE flag=1(YES), go to HT1PRE.

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

Otherwise, go to Section SE – Service Environment.

HT1PRE	HT1PRE	NOT ON FILE
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Now, let's talk about the place {you live/SP lives}.

PRESS 1 AND ENTER TO CONTINUE

HT1	ht5longlived	R5 HT1 HOW LONG LIVED THERE
------------	---------------------	-----------------------------

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

INDICATE RESPONSE UNIT

CODES

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

HT1A	ht5mthslived	R5 HT1A MNTHS IF LESS THAN 1 YR
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QUESTION TEXT:

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

ENTER ZERO IF LESS THAN 1 MONTH

ENTER NUMBER

Range

0 to 11

PROGRAMMER INSTRUCTIONS:

Range 0-11

Go to Box HT3

HT1B	ht5yrslived	R5 HT1B YEARS LIVED AT ADDRESS
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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**ht5longersyr**

R5 HT2 LIVED HERE 5 YRS OR LNGER

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX HT3**BOX HT3**

NOT ON FILE

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

HT3**ht5placedesc**

R5 HT3 PLACE BEST DESCRIPTION

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOW CARD HT1

Now, I'm going to show you a list of places. Which of these BEST describes this place?

PRESS F1 FOR HELP SCREEN

CODES

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

HT3A**HT3A**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Text length 25 char

BOX HT3B**BOX HT3B**

NOT ON FILE

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

HT4**ht5retiresen**

R5 HT4 RETIRMNT CMMTY SEN HOUSIN

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

If HT4 = 1 (YES), set RETIREMENT COMMUNITY flag = 1 (YES).

BOX HT5**BOX HT5**

NOT ON FILE

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

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

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

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

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

HT5**ht5diffareun**

R5 HT5 DIFF AREAS UNITS TO MOVE

QUESTION TEXT:

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

CODES

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

HT6**ht5helpmedbd**

R5 HT6 HELP W MEDS BATH DRESSING

QUESTION TEXT:

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

CODES

1	YES	BOX HT8
2	NO	
	REFUSED	
	DON'T KNOW	

HT7

ht5meals

R5 HT7 MEALS FOR RESIDENTS

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX HT8

BOX HT8

NOT ON FILE

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

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

BOX HT9A

BOX HT9A

NOT ON FILE

If Facility Task = code 20 (COMPLETED), use FACILITY NAME from FQ for facility name displays and go to HT10.

Else if preloaded IMS facility name field is not blank, go to HT9a.

Otherwise, go to HT9b.

HT9A

HT9A

NOT ON FILE

QUESTION TEXT:

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

IF PLACE NAME IS NOT DISPLAYED, ENTER 2.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

Otherwise, use null display for facility name displays.

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

HT9B

HT9B

NOT ON FILE

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length

75

PROGRAMMER INSTRUCTIONS:

Text length 75 char

Display FACILITY NAME from HT9b for facility name displays.

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

HT10

ht5spacename

R5 HT10 NAME OF LIVING SPACE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HT10A

HT10A

NOT ON FILE

QUESTION TEXT:

SPECIFY NAME FOR PRIVATE LIVING SPACE

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Text length 25 char

BOX HT11

BOX HT11

NOT ON FILE

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

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

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

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

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

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

Go to Section SE – Service Environment

Flag Variables set in HT Section

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

NHATS Round 5

Section SE [SERVICE ENVIRONMENT]

Sequence: 5

BOX SE1PRE

BOX SE1PRE

NOT ON FILE

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

SE1PRE

SE1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Sometimes people live in places that offer care and other services and conveniences that help with daily activities.

I'm going to read you a list of services that may be available to people at {FACILITY NAME/the place where {you live/SP lives}}. Whether or not {you use/{he/she} uses} it, please tell me if {FACILITY NAME/the place where {you live/SP lives}} offers the following services.

If you are not sure, just say you don't know.

PRESS 1 AND ENTER TO CONTINUE.

BOX SE1

BOX SE1

NOT ON FILE

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

SE1

se5servcoff1

R5 SE1 FAC SERVICES MEALS

se5servcoff2

R5 SE1 FAC SERVICES HELP W RX

se5servcoff3

R5 SE1 FAC SERV HELP BATH DRESS

se5servcoff4

R5 SE1 FAC SERVICES LAUNDRY

se5servcoff5

R5 SE1 FAC SERVICES HOUSEKEEP

se5servcoff6

R5 SE1 FAC SERV VAN TO DOCTOR

se5servcoff7

R5 SE1 FAC SRV VAN TO STORE EVNT

se5servcoff10

R5 SE1 FAC SERV FITNESS CTR

se5servcoff11

R5 SE1 FAC SERV WALKING AREA

se5servcoff8

R5 SE1 FAC SERV RECREATIONAL FAC

se5servcoff9

R5 SE1 FAC SERV SOCIAL EVENTS

se5servcoff12

R5 SE1 FAC SERV ONSITE HEALTH

se5servcoff13

R5 SE1 FAC SERV MED EMERGENCY
SYSTEM

DISPLAY INSTRUCTIONS:

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

Use "Same Question Stem" display.

If at SE1a, do not display question text in brackets.

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

Otherwise, display question text in brackets.

QUESTION TEXT:

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

{variable text [a-m]}

RESPONSE [1] a. meals in a common dining area or in their room?

RESPONSE [2] b. help with medications?

RESPONSE [3] c. help with bathing or dressing?

RESPONSE [4] d. laundry service for linens or clothing?

RESPONSE [5] e. housekeeping?

RESPONSE [6] f. a van or shuttle to doctors or other medical care providers?

RESPONSE [7] g. a van or shuttle to stores or events like concerts?

RESPONSE [10] h. an indoor fitness center?

RESPONSE [11] i. areas to walk for pleasure or exercise like an outdoor walking path?

RESPONSE [8] j. other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?

RESPONSE [9] k. organized social events and activities?

RESPONSE [12] l. onsite health and wellness programs?

RESPONSE [13] m. a medical emergency system to call someone for help?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel

Display "variable text" in the a-m sequence until all rows have been displayed.

BOX SE2	BOX SE2	NOT ON FILE
If any item at SE1a-m = 1 (YES), go to SE2 Otherwise, go to Section HH - Household		
SE2	se5servused1	R5 SE2 SERVS USED MEALS
	se5servused2	R5 SE2 SERVS USED HELP W RX
	se5servused3	R5 SE2 SERVS USED HLP BATH DRESS
	se5servused4	R5 SE2 SERVS USED LAUNDRY
	se5servused5	R5 SE2 SERVS USED HOUSEKEEPING
	se5servused6	R5 SE2 SERVS USED VAN TO DOCTOR
	se5servused7	R5 SE2 SERVS USED VAN TO STORE

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

DISPLAY INSTRUCTIONS:

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

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

Use "Same Question Stem" display

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

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

QUESTION TEXT:

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

{variable text [a-M]}

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

CODES

1 YES
 2 NO
 REFUSED
 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX SE3	BOX SE3	NOT ON FILE
If any item at SE1a-m=1 (YES), go to SE3. Otherwise, go to Section HH – Household.		
SE3	se5payservi1	R5 SE3 PAYMENT FOR SERV MEALS
	se5payservi2	R5 SE3 PAYMENT FOR SERV HLP W RX
	se5payservi3	R5 SE3 PAY FR SERV HLP BATH DRSS
	se5payservi4	R5 SE3 PAYMENT FOR SERV LAUNDRY
	se5payservi5	R5 SE3 PAYMENT FOR SERV HOUSEKEEP
	se5payservi6	R5 SE3 PAYMNT FR SERV VAN TO DOC
	se5payservi7	R5 SE3 PAY FOR SERV VAN TO STORE
	se5payservi10	R5 SE3 PAY FOR SERV FITNESS CTR
	se5payservi11	R5 SE3 PAY FOR SERV WALKING AREA
	se5payservi8	R5 SE3 PAY FOR SERV RECREATION
	se5payservi9	R5 SE3 PAY FOR SERV SOCIAL EVENTS
	se5payservi12	R5 SE3 PAY FOR SERV ONSITE HEALTH
	se5payservi13	R5 SE3 PAY FOR SERV MED EMERGENCY SYSTEM

DISPLAY INSTRUCTIONS:

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

Use "Same Question Stem" display.

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

QUESTION TEXT:

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

{variable text [a-m]}

RESPONSE [1] a. meals (in a common dining area or in {your/SP's} own room)?

RESPONSE [2] b. help with medications?

RESPONSE [3] c. help with bathing and dressing?

RESPONSE [4] d. laundry services for linens or clothing?

RESPONSE [5] e. housekeeping?

RESPONSE [6] f. a van or shuttle to doctors or other medical care?

RESPONSE [7] g. a van or shuttle to stores or events like concerts?

RESPONSE [8] h. an indoor fitness center?

RESPONSE [9] i. areas to walk for pleasure or exercise like an outdoor walking path?

RESPONSE [10] j. other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?

RESPONSE [11] k. organized social events and activities?

RESPONSE [12] l. onsite health and wellness programs?

RESPONSE [13] m. a medical emergency system to call someone for help?

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display "variable text" in the a-m sequence until all rows have been displayed.

Go to Section HH – Household.

NHATS Round 5

Section HH [HOUSEHOLD]

Sequence: 6

HH1PRE HH1PRE NOT ON FILE

QUESTION TEXT:

Now let's talk about {your/SP's} family.

PRESS 1 AND ENTER TO CONTINUE

BOX HH1A BOX HH1A NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HH1.

If LAST INT SP MARITAL STATUS = null, go to HH1.

Otherwise, go to HH1A.

HH1A hh5marchange R5 HH1A MARITAL STATUS CHANGE

DISPLAY INSTRUCTIONS:

If LAST INT SP MARITAL STATUS = 1 (MARRIED), display "married".

If LAST INT SP MARITAL STATUS = 2 (LIVING WITH A PARTNER), display "living with a partner".

If LAST INT SP MARITAL STATUS = 3 (SEPARATED), display "separated".

If LAST INT SP MARITAL STATUS = 4 (DIVORCED), display "divorced".

If LAST INT SP MARITAL STATUS = 5 (WIDOWED), display "widowed".

If LAST INT SP MARITAL STATUS = 6 (NEVER MARRIED), display "never married".

QUESTION TEXT:

At the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} {married/living with a partner/separated/divorced/widowed/never married}. Has that changed?

That is, did {you/SP} get married, separated, divorced, remarried, widowed, or start living with a (different) partner?

CODES

1	YES	HH1
2	NO	
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

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

BOX HH1 BOX HH1 NOT ON FILE

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

Otherwise, set CURRENT INT SP MARITAL STATUS = LAST INT SP MARITAL STATUS and go to BOX HH13.

HH1 hh5martlstat R5 HH1 MARITAL STATUS IF CHANGED
hh5dmarstat R5 D MARITAL STATUS AT R5

DISPLAY INSTRUCTIONS:

Display "currently" in underlined text.

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Set Marital Status = HH1 for SP on PERSON ROSTER.

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

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

BOX HH2A**BOXHH2A**

NOT ON FILE

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

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

HH2A**hh5mthendmar (Sensitive)**

R5 HH2A MTH MARR END OR SPS PASS

DISPLAY INSTRUCTIONS:

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

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

Display "MONTH" in underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

RANGE	1 to 12
REFUSED	
DON'T KNOW	

BOX HH2B**BOXHH2B**

NOT ON FILE

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

HH2B**hh5yrendmarrnew**

R5 HH2B YR MARR END NEW SAMPLE

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON’T KNOW

PROGRAMMER**INSTRUCTIONS:**

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

All responses skip to Box HH13

HH2C**hh5yrendmarr**

R5 HH2C YR MARR END OR SPS PASS

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS=4 (DIVORCED), display “{your/SP’s} (most recent) marriage ended”.

If SP MARITAL STATUS =5 (WIDOWED), display, “{your/SP’s} spouse passed away”.

QUESTION TEXT:

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

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

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

All responses skip to BOX HH13.

HH3**hh5yrsmarliv**

R5 HH3 YEARS MARR OR LIV TOGTEHR

DISPLAY INSTRUCTIONS:

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

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

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

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

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

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

QUESTION TEXT:

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

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

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Hard range 0-80
Soft range 0-60

BOX HH4A1**BOX HH4A1**

NOT ON FILE

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

Else if HH1A = 2 (MARITAL STATUS NOT CHANGED), go to HH4A1.

Else if HH1A = RF or DK (MARITAL STATUS REFUSED OR DON'T KNOW), go to BOX HH13.

Otherwise, go to HH4a.

HH4A1**hh5newspopr**

R5 HH4A1 SPOUSE PRTNR SAME OR DIFF

op5spouprtnr

R5 SPOUSE PARTNER

op5nwspouprt

R5 NEW SPOUSE PARTNER THIS ROUND

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".

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

QUESTION TEXT:

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

CONFIRM SPELLING

CODES

1	YES	HH10
2	NO, DIFFERENT PERSON	

PROGRAMMER INSTRUCTIONS:

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

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

HH4A2**HH4A2**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".

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

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

Display "NOT ON LIST" as first roster option.

QUESTION TEXT:

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

CHOOSE PERSON FROM LIST

PROGRAMMER INSTRUCTIONS:

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

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

Otherwise, go to HH4A.

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

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

HH4A**HH4A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".

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

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

Display "FIRST" in bold underlined text.

QUESTION TEXT:

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

ENTER FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

45

PROGRAMMER INSTRUCTIONS:

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

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

HH4B

HH4B

NOT ON FILE

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".

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

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

Display "MIDDLE" in bold underlined text.

QUESTION TEXT:

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

ENTER MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

Allow empty.

HH4C

HH4C

NOT ON FILE

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS = 1 (MARRIED), display "spouse".

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

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

Display "LAST" in bold underlined text.

QUESTION TEXT:

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

ENTER LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

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

BOX HH5**BOX HH5**

NOT ON FILE

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

Otherwise, go to HH6A.

HH5**hh5spgender**

R5 HH5 NEW R4 SPOU PART GENDER

op5dgender

R5 D GENDER UPDATE AND NEW

DISPLAY INSTRUCTIONS:

If SP MARITAL STATUS=1 (MARRIED), display "spouse".

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

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Write SPOUSE/PARTNER gender from HH5 to PERSON ROSTER.

BOX HH6A**BOX HH6A**

NOT ON FILE

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

Otherwise, go to HH9.

HH6A**hh5modob (Sensitive)**

R5 HH6A NEW R4 SPOU PART MO DOB

op5birthmth (Sensitive)

R5 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "your".

Otherwise, display "{SPOUSE/PARTNER FIRST NAME LAST NAME}'s".

Display HH6A, HH6B, and HH6C on the same screen.

Display "month" as underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 12

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH6B**HH6B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display HH6A, HH6B, and HH6C, on the same screen.

Display “day” as underlined text.

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBER

Range

1 to 31

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range 1-31

HH6C**hh5yrdob (Sensitive)**

R5 HH6C NEW R5 SPOU PART YR DOB

op5birthyear (Sensitive)

R5 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

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

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

Display “year” as underlined text.

QUESTION TEXT:

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

ENTER YEAR

ENTER NUMBER

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: CURRENT YEAR – 110.

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

HH7**hh5dspageall**

R5 D SPOU PAR AGE UPDATE AND NEW

hh5spageall

R5 SPOU PAR AGE UPDATE AND NEW

op5age (Sensitive)

R5 OTH PERSON AGE UPDATE AND NEW

op5dage

R5 D OP CAT AGE UPDATE AND NEW

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

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

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

ENTER AGE

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

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

BOX HH9	BOX HH9	NOT ON FILE
----------------	----------------	-------------

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

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

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOW CARD HH1

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Write education level to PERSON ROSTER.

If HH9 = DK or RF, display "DK" or "RF" in matrix education field.

HH10**hh5spoupchlp**

R5 HH10 SPOUS NEED PERS CARE HLP

DISPLAY INSTRUCTIONS:

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "do you".

Otherwise, display "does {SPOUSE/PARTNER FIRST NAME LAST NAME}".

QUESTION TEXT:

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

CODES

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

HH11**hh5livwthspo**

R5 HH11 LIVE WITH SPOUSE PARTNER

op5prsinhh

R5 OP IN HOUSEHOLD UPDATE AND NEW

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

REFUSED
DON'T KNOW

BOX HH13
BOX HH13

PROGRAMMER INSTRUCTIONS:

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

HH12

hh5placekind

R5 HH12 KIND OF PLACE LIVE IN

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOWCARD HH2

What kind of place {are you/is {SPOUSE/PARTNER FIRSTNAME LASTNAME}} living in now?

PRESS F1 FOR HELP SCREEN

CODES

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

HH12A

HH12A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length

50

BOX HH13

BOX HH13

NOT ON FILE

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

HH13B

hh5othlwhere

R5 HH13B ANYONE ELSE LIVE HERE

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

CODES

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

BOX HH13D

BOX HH13D

NOT ON FILE

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

Otherwise, go to HH14.

HH13D

op5prsinhh

R5 OP IN HOUSEHOLD UPDATE AND NEW

op5childinh

R5 CHILD IN HOUSEHOLD UPDATE AND NEW

DISPLAY INSTRUCTIONS:

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

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

Display questions HH13D-HH13E on full matrix screen.

QUESTION TEXT:

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

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

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

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

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

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

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

Allow up to 32 row entries.

Allow movement between grid items using the arrow keys.

Text field is 2 5 char for each name field.

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

HH13E	op5reasgone	R5 HH13E REASON GONE FROM HH
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DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to HH13D for next ROSTER MEMBER.
If HH13E=2 (DECEASED), set DECEASED flag =1 (YES) for ROSTER MEMBER.
If no other ROSTER MEMBERS, go to HH14.

HH13F	HH13F	NOT ON FILE
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DISPLAY INSTRUCTIONS:

Display "FIRST" in bold underlined text.

QUESTION TEXT:

CONFIRM SPELLING OF FIRST NAME.

HH13G	HH13G	NOT ON FILE
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DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

QUESTION TEXT:

CONFIRM SPELLING OF LAST NAME.

PROGRAMMER INSTRUCTIONS:

If HH13D = 1 (YES) or 2 (NO), display ROSTER MEMBER in HHMEMBER matrix with grayed out fields upon advancing to next roster entry.

Go to HH13D for next ROSTER MEMBER.

If no other ROSTER MEMBERS, go to HH14.

HH14**op5prsninh****R5 OP IN HOUSEHOLD UPDATE AND NEW****DISPLAY INSTRUCTIONS:**

Display HHMEMBER ROSTER as a grid. Display any ROSTER MEMBERS with CURRENT INT INHH flag=1 (YES) on the HHMEMBER GRID.

If PROXY flag = 2 (NO) or [PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER) and INHH flag for SPOUSE/PARTNER = 1 (YES)], display "you".

Else if PROXY flag=1 (YES) and INHH flag for PROXY=1 (YES) and PROXY RELATIONSHIP <> 2 (SPOUSE/PARTNER), display "you and {SP}".

Otherwise, display "{SP}".

Only display ROSTER MEMBERS with CURRENT INT INHH flag <> 1 (not in HH) as entries that can be selected to add to the HH Roster. Display ROSTER MEMBERS with CURRENT INT INHH flag = 1 (YES) as follows: "[{ROSTER MEMBER FIRST AND LAST NAME}, HERE]" and grayed out. For any ROSTER MEMBERS added to HH Roster at this screen, display as "[{ROSTER MEMBER FIRST AND LAST NAME}, HERE]" and grayed out.

Display questions HH14-HH19 on full matrix screen.

If at HH14-HH14B, do not display question test in brackets during first entry to person roster. Otherwise, display question text in brackets.

If at first entry to person roster, display "first". Otherwise, display "next".

If any ROSTER MEMBERS with INHH flag = 1 (YES), display "Other than the people I just asked about," and "please". Otherwise display "Please".

If NEWSAMPLE flag = 1 (YES), display "Please tell me the names of all of the people who usually live (here)". Otherwise, display "{Other than the people I just asked about,} {please/Please} tell me the name of the {first/next} person who lives"

QUESTION TEXT:

{[}{Other than the people I just asked about,} {please/Please} tell me the name of the {first/next} person who lives/Please tell me the names of all of the people who usually live (here)} with {you/{SP}/you and {SP}}. Please include people temporarily absent.{]}

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

SELECT TO ADD TO HOUSEHOLD ROSTER, ONE AT A TIME

IF PERSON NAMED IS NOT ON THE ROSTER, SELECT "NOT ON LIST" TO ADD A PERSON

PRESS ENTER IF MATRIX IS COMPLETE

HH14A

HH14A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

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

Otherwise, display question text in brackets.

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length

45

PROGRAMMER INSTRUCTIONS:

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

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

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

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

Allow up to 25 row entries.

Allow movement between grid items using the arrow keys.

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

Text field is 25 char for each name field.

Go to HH20 when matrix is complete.

HH14B

HH14B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

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

Otherwise, display question text in brackets.

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length

25

HH15

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

op5childinh

R5 CHILD IN HOUSEHOLD UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HOUSEHOLDRELATIONSHIP CODE LIST.

QUESTION TEXT:

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

CONFIRM SPELLING

CODES

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

PROGRAMMER INSTRUCTIONS:

If HH15 = 3 (daughter), 5 (daughter-in-law), 7 (stepdaughter), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt), set PERSON GENDER = 2 (female) and go to HH17A.

ELSE If HH15 = 4 (son), 6 (son-in-law), 8 (stepson), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle), set PERSON GENDER = 1 (male) and go to HH17A. Otherwise, go to HH16.

If HH15 = 3 (daughter), 4 (son), 7 (stepdaughter), or 8 (stepson), set CHILDINHH flag = 1 (yes) for ROSTER PERSON.

HH16

op5dgender

R5 D GENDER UPDATE AND NEW

QUESTION TEXT:

Is {FIRSTNAME LASTNAME} male or female?

CODES

1	MALE
2	FEMALE

PROGRAMMER INSTRUCTIONS:

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

BOX HH17**BOX HH17**

NOT ON FILE

If HH15 = 25-36, 91 OR 92, go to HH14a.
Otherwise, go to HH17A.

HH17A**op5birthmth (Sensitive)**

R5 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

Display HH17A, 17B, and 17C, on the same screen.
Display “month” as underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range	1 to 12
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH17B**HH17B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display HH17A, 17B, and 17C, on the same screen.
Display “day” as underlined text.

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBER

Range	1 to 31
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range 1-31

HH17C**op5birthyear (Sensitive)**

R5 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

op5age

R5 D OP CAT AGE UPDATE AND NEW

op5age (Sensitive)

R5 OTH PERSON AGE UPDATE AND NEW

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

If HH18 = 1 (yes), write HHMEMBER AGE to PERSON ROSTER.

If HH18 = DK or RF, display “DK” or “RF” in matrix age field.

If HH18 = 2 (NO), display error message “PLEASE CORRECT THE DATE OF BIRTH INFORMATION”.

HH19

op5age

R5 D OP CAT AGE UPDATE AND NEW

op5age (Sensitive)

R5 OTH PERSON AGE UPDATE AND NEW

QUESTION TEXT:

How old is {FIRSTNAME LASTNAME}?

ENTER AGE

IF LESS THAN 1 YEAR, ENTER 0.

ENTER NUMBER

Range

0 to 110

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Numeric field range: 0-110.

Write PERSON AGE to PERSON ROSTER.

If HH19 = DK or RF, display “DK” or “RF” in matrix age field.

Go to HH14.

HH20

HH20

NOT ON FILE

QUESTION TEXT:

IS THE HOUSEHOLD MATRIX COMPLETE?

CODES

1 YES
2 NO

SECTION CS
HH14

PROGRAMMER INSTRUCTIONS:

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

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

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

NHATS Round 5

Section CS [CHILDREN AND SIBLINGS]

Sequence: 7

BOX CS1

BOX CS1

NOT ON FILE

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

CS1

CS1

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

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

If PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "you".

Otherwise, display "{FIRSTNAME LASTNAME of roster entry with 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)}".

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

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

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

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

QUESTION TEXT:

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

CODES

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

CS1A

op5chnotinh

R5 CHILD NOT HOUSEHOLD UPDATE AND NEW

DISPLAY INSTRUCTIONS:

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

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

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

Otherwise, display “At”.

QUESTION TEXT:

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

{FIRSTNAME LASTNAME}, {RELATIONSHIP}

Is this information still correct?

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

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

CONFIRM SPELLING

CODES

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

CS1B

op5chnotinhh

R5 CHILD NOT HOUSEHOLD UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display ROSTER as a grid.

Display questions CS1B-CS1G on full matrix screen.

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

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

For the first ROSTER MEMBER, display “First”.
Otherwise, display “Next”

QUESTION TEXT:

{First/Next} we recorded

{FIRSTNAME LASTNAME} {RELATIONSHIP}

Is this correct?

CONFIRM SPELLING

CODES

1	INFO CORRECT	CS1E
2	UPDATES NEEDED	

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

PROGRAMMER INSTRUCTIONS:

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

CS1C	CS1C	NOT ON FILE
-------------	-------------	-------------

DISPLAY INSTRUCTIONS:

Prefill name in response field and allow corrections.
Do not display question text in brackets during first entry to person roster.
Otherwise, display question text in brackets.

Display "first" as underlined text.

QUESTION TEXT:

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

{FIRSTNAME LASTNAME} {RELATIONSHIP}

CONFIRM SPELLING

ENTER TEXT

Length 25

CS1D	CS1D	NOT ON FILE
-------------	-------------	-------------

DISPLAY INSTRUCTIONS:

Prefill name in response field and allow corrections.

Display "last" as underlined text.

QUESTION TEXT:

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

{FIRSTNAME LASTNAME} {RELATIONSHIP}

CONFIRM SPELLING

ENTER TEXT

Length 25

PROGRAMMER INSTRUCTIONS:

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

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

QUESTION TEXT:

Does {FIRSTNAME LASTNAME}, {RELATIONSHIP} currently live in {CITY}, {STATE}?

IF CITY OR STATE MISSING, DON'T KNOW, OR REFUSED, SELECT CODE 2 UPDATES NEEDED.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

CS1F**op5rescity (Restricted)**

R5 CITY OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display "CITY" in underlined text.

Display CS7a and CS7b on the same screen.

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

QUESTION TEXT:

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

ENTER CITY

CONFIRM SPELLING

ENTER TEXT

Length

25

REFUSED

DON'T KNOW

CS1G**op5resstate (Restricted)**

R5 STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display CS7a and CS7b on the same screen.

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

QUESTION TEXT:

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

ENTER STATE

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

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use lookup file (59STATERR) of state names.

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

BOX CS1H**BOX CS1H**

NOT ON FILE

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

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

Otherwise, go to Box CS14.

CS1H**CS1H**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

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

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

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

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

If PROXY flag is null, display "do you" or "Do you".

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

QUESTION TEXT:

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

CODES

1	YES	CS2
2	NO	
	REFUSED	
	DON'T KNOW	

BOX CS2**BOX CS2**

NOT ON FILE

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

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

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

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

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

CS2

CS2

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display CHILDREN ROSTER as a grid.

Display questions CS2A-CS7B on full matrix screen.

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

Display "first" as underlined text.

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

QUESTION TEXT:

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

What is (his/her) first name?

CONFIRM SPELLING

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

{PRESS ENTER IF MATRIX IS COMPLETE}

PROGRAMMER INSTRUCTIONS:

For each ROSTER addition, set CHILDNOTINHH flag= 1 (YES) for ROSTER PERSON.

Allow up to 15 row entries.

Allow movement between grid items using the arrow keys.

Go to CS8 when matrix is complete

CS2A

CS2A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

QUESTION TEXT:

What is (his/her) first name?

CONFIRM SPELLING

ENTER TEXT

Length

25

CS2B

CS2B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

QUESTION TEXT:

What is (his/her) last name?

CONFIRM SPELLING

ENTER TEXT

Length

25

CS3

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

op5dgender

R5 D GENDER UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display CHILD RELATIONSHIP CODE LIST

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

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

QUESTION TEXT:

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

PRESS F1 FOR HELP SCREEN

CODES

3	DAUGHTER
4	SON
7	STEPDAUGHTER
8	STEPSON

CS4A

op5birthmth (Sensitive)

R5 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

Display "month" in underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 12

CS4B

CS4B

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display “day” as underlined text.

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBER

Range 1 to 31
 REFUSED
 DON'T KNOW

CS4C

op5birthyear (Sensitive) R5 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

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

Display “year” as underlined text.

QUESTION TEXT:

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

ENTER YEAR

ENTER NUMBER

Range 1 to 12
 REFUSED
 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: CURRENT YEAR – 95.

Soft range: (CURRENT YEAR – 20) – (CURRENT YEAR – 75)

If CS4c violates hard range, display error message "YEAR OF BIRTH OUTSIDE OF RANGE, CONFIRM WITH RESPONDENT AND RE-ENTER".

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

CS5

op5age (Sensitive)

R5 OTH PERSON AGE UPDATE AND NEW

op5dage

R5 D OP CAT AGE UPDATE AND NEW

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

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

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

CS6**op5age (Sensitive)**

R5 OTH PERSON AGE UPDATE AND NEW

op5dage

R5 D OP CAT AGE UPDATE AND NEW

QUESTION TEXT:

How old is {FIRSTNAME LASTNAME}?

ENTER AGE

IF LESS THAN 1 YEAR, ENTER 0

ENTER NUMBER

Range

0 to 95

Soft Range

15 to 75

REFUSED

DON'T Know

PROGRAMMER INSTRUCTIONS:

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

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

CS7A**op5rescity (Restricted)**

R5 CITY OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display "CITY" in underlined text.

Display CS7a and CS7b on the same screen

QUESTION TEXT:

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

ENTER CITY

CONFIRM SPELLING

ENTER TEXT

Length

25

REFUSED

DON'T KNOW

CS7B**op5resstate (Restricted)**

R5 STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display CS7a and CS7b on the same screen

QUESTION TEXT:

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

ENTER STATE

TYPE THE FIRST LETTER OF 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 (59STATETERR) of state names.
Write PERSON CITY and STATE to PERSON ROSTER.
Go to CS2A

CS8	CS8	NOT ON FILE
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DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

IS THE{ NEW} CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS2A

PROGRAMMER INSTRUCTIONS:

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

BOX CS9PRE	BOXCS9PRE	NOT ON FILE
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If any ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and DECEASED flag <> 1 (YES) for ROSTER MEMBER, go to CS9PRE.
Otherwise, go to BOX CS14.

CS9PRE	CS9PRE	NOT ON FILE
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QUESTION TEXT:

Now I have a few questions about each of {your/SP's} children.

PRESS 1 AND ENTER TO CONTINUE

CS9	op5educchild	R5 HH9 CHILD EDUC WHEN ADDED
	op5leveledu	R5 OP HIGHEST ED WHEN ADDED

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOWCARD CS1

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

Allow movement between grid items using the arrow keys.

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

Go to CS13 when matrix is complete.

Write education level to PERSON ROSTER.

CS10

op5martlstat

R5 CHILD MARITL STAT WHEN ADDED

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Write Marital status to PERSON ROSTER.

CS11

op5numchldr

R5 CHILD NUM CHILDRN WHEN ADDED

QUESTION TEXT:

How many living children does {FIRSTNAME LASTNAME} have?

IF NEEDED: Include step and adopted children.

ENTER NUMBER OF CHILDREN

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

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

Write number of children to PERSON ROSTER.

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

CS12	op5anychdu18	R5 CHILD CHILD U 18 WHEN ADDED
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QUESTION TEXT:

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

CODES

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

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

QUESTION TEXT:

How many children are under age 18?

ENTER NUMBER

Range	1 to 20
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write number of children under 18 to PERSON ROSTER.

If CS12a > CS11, display error message "NUMBER OF CHILDREN UNDER 18 CANNOT BE GREATER THAN TOTAL NUMBER OF CHILDREN".

Write FIRST NAME, LAST NAME, RELATIONSHIP, DOB, AGE, CITY, STATE, EDUCATION LEVEL, MARITAL STATUS, # OF CHILDREN, AND # OF CHILDREN UNDER 18 TO PERSON ROSTER FOR ROSTER MEMBER. Go to CS9.

BOX CS13	BOXCS13	NOT ON FILE
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If any other ROSTER MEMBERS with relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) and DECEASED flag <> 1 (YES) for ROSTER MEMBER, go to CS9. Otherwise, go to CS13.

CS13	CS13	NOT ON FILE
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QUESTION TEXT:

IS THE CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS9

PROGRAMMER INSTRUCTIONS:

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

BOX CS14**BOX CS14**

NOT ON FILE

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

Otherwise, go to CS14.

CS14**cs5sistrsnum**

R5 CS14 NUMBER OF LIVING SISTERS

QUESTION TEXT:

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

ENTER NUMBER OF SISTERS

**ENTER
NUMBER**

Range	0 to 20
Soft Range	0 to 10
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 0-20.

Soft range: 0-10.

BOX CS15**BOX CS15**

NOT ON FILE

If LAST INT CS15 = 0, go to Section SN – Social Network

Otherwise, go to CS15.

CS15**cs5brthrsnum**

R5 CS15 NUMBER OF LIVNG BROTHERS

QUESTION TEXT:

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

ENTER NUMBER OF BROTHERS

**ENTER
NUMBER**

Range	0 to 20
Soft Range	0 to 10
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 0-20.

Soft range: 0-10.

Derived Variables from Items in CS Section	
cs5dnumchild	R5 D NUMBER OF CHILDREN
cs5dnmstpchd	R5 D NUMBER OF STEPCHILDREN
cs5dnumdaugh	R5 D NUMBER OF DAUGHTERS
cs5dnumson	R5 D NUMBER OF SONS
op5dchilddec	R5 D CHILD NOT IN HH DIED
op5dgender	R5 D GENDER UPDATE AND NEW
op5dage	R5 D OP CAT AGE UPDATE AND NEW

NHATS Round 5

Section SN [SOCIAL NETWORK]

Sequence: 8

BOX SN1 BOX SN1 NOT ON FILE

If PROXY flag = 1 (YES), go to Section HO – Home Environment.
Otherwise, go to SN1PRE

SN1PRE SN1PRE NOT ON FILE

QUESTION TEXT:

The next questions are about who you talk to about important things in your life. This may include good or bad things that happen to you, problems you are having, or important concerns you may have.

PRESS 1 AND ENTER TO CONTINUE

SN2 op5soclntrwk R5 SN2 PART OF SP SOCIAL NETWORK

DISPLAY INSTRUCTIONS:

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP if any person has been added to the PERSON ROSTER other than the SP.

Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

For additions to the PERSON ROSTER, display SOCIAL NETWORK RELATIONSHIP CODE LIST.

Display "SP HAS NO ONE TO TALK TO" as first option on the PERSON ROSTER DISPLAY.

Display "UP TO 5 PEOPLE" in bold underlined text.

QUESTION TEXT:

Looking back over the last year, who are the people you talked with most often about important things?

Please tell me their first and last name and their relationship to you.

SELECT/ENTER UP TO 5 PEOPLE IN THE ORDER SP NAMES PEOPLE

PROBE ONCE IF SP NAMES FEWER THAN 5 PEOPLE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

SN3. [What is (his/her) first name?] CONFIRM SPELLING

SN4. [What is (his/her) last name?] CONFIRM SPELLING

SN5. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|-----------------|
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |

15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-SPOUSE/PARTNER
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SERVICE/SOMEONE FROM THE PLACE SP LIVES
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Allow up to 5 selections to PERSON ROSTER.

Display "CTRL/P" in red bolded font.

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

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

If no additions to or selections from the PERSON ROSTER, go to Section HO – Home Environment.

If other roster selections and "SP HAS NO ONE TO TALK TO" is selected, display message "INCONSISTENT ANSWER. NO ONE TO TALK TO CANNOT BE SELECTED WITH OTHER ROSTER ENTRIES."

For each roster selection other than "SP HAS NO ONE TO TALK TO" at SN2, set SOCIAL NETWORK flag = 1 (YES).

If more than 5 roster members selected at SN2, display error message, "YOU MAY ONLY SELECT 5 PEOPLE."

For each addition to the PERSON ROSTER:

If 5 (daughter-in-law), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt) selected, set PERSON GENDER = 2 (female)

Else if 6 (son-in-law), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle) selected, set PERSON GENDER = 1 (male)

BOX SN6**BOX SN6**

NOT ON FILE

QUESTION TEXT:

Display grid with ROSTER MEMBERS with SOCIAL NETWORK flag = 1 (YES) and (INHH flag <> 1 (YES) or relationship <> 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON)).

Display grid with fields: First Name, Last Name, How Related, Gender, Age Group, City, and State. Gender, Age Group, City, and State can be edited.

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

Allow movement between grid items using the arrow keys.

Loop through BOX SN6A through BOX SN9 for each ROSTER MEMBER selected or added at SN2.

BOX SN6A**BOX SN6A**

NOT ON FILE

If ROSTER MEMBER has GENDER = (NULL, RF or DK), go to SN6.
Otherwise, go to BOX SN7.

SN6**op5dgender**

R5 D GENDER UPDATE AND NEW

QUESTION TEXT:

If NOT OBVIOUS, ASK:

Is {FIRST NAME LAST NAME} male or female?

CODES

1	MALE
2	FEMALE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Write PERSON GENDER to PERSON ROSTER.

BOX SN7**BOX SN7**

NOT ON FILE

If AGE CATEGORY for ROSTER MEMBER <> (NULL, RF or DK), go to SN7.
Else if AGE CATEGORY for ROSTER MEMBER = (NULL, RF or DK), go to SN7A.
Otherwise, go to BOX SN8.

SN7**op5dcatgryag**

R5 D OTH PERSN SN CAT AGE

QUESTION TEXT:

Is {FIRST NAME LAST NAME} still {LAST INT AGE CATEGORY} years old?

CODES

1	INFO CORRECT	BOX SN8
2	UPDATES NEEDED	
	REFUSED	BOX SN8
	DON'T KNOW	BOX SN8

SN7A**op5dcatgryag****R5 D OTH PERSN SN CAT AGE****QUESTION TEXT:**

How old is {FIRST NAME LAST NAME}?

CODES

1	UNDER 30
2	30-39
3	40-49
4	50-59
5	60-69
6	70-79
7	80-89
8	90+
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Write AGE CATEGORY to PERSON ROSTER.

BOX SN8**BOX SN8****NOT ON FILE****QUESTION TEXT:**

If CITY for ROSTER MEMBER <> (NULL, RF or DK), go to SN8.
Else if CITY for ROSTER MEMBER = (NULL, RF or DK), go to SN8A.
Otherwise, go to BOX SN9.

SN8**SN8****NOT ON FILE****QUESTION TEXT:**

Does {FIRST NAME LAST NAME} still live in {CITY, STATE}?

CONFIRM SPELLING

CODES

1	INFO CORRECT	BOX SN9
2	UPDATES NEEDED	BOX SN9
	REFUSED	
	DON'T KNOW	BOX SN9

SN8A**op5rescity****R5 CITY OF RESIDENCE****DISPLAY INSTRUCTIONS:**

Display SN8a and 8b on the same screen.
Display "city" as underlined text.

QUESTION TEXT:

Where does {FIRST NAME LAST NAME} live?

[What is {FIRST NAME LAST NAME}'s city?]

CONFIRM SPELLING

ENTER TEXT

Length

25

SN8B

op5resstate

R5 STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display SN8a and 8b on the same screen.

Display "state" as underlined text.

QUESTION TEXT:

[What is {FIRST NAME LAST NAME}'s state?]

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

PROGRAMMER INSTRUCTIONS:

Use lookup file (59STATETERR) of state names

Display state name response label.

Write PERSON CITY and STATE to PERSON ROSTER.

BOX SN9

BOX SN9

NOT ON FILE

Go to BOX SN6A for next ROSTER MEMBER selected or added at SN2.
If no other selections or additions, go to SN9.

SN9

SN9

NOT ON FILE

QUESTION TEXT:

IS THE SOCIAL NETWORK MATRIX COMPLETE?

CODES

1	YES	Section HO
2	NO	SN2

Derived Variables from Items in SN Section

sn5dnumsn	R5 D NUMBER IN SOCIAL NETWORK
op5dcatgryag	R5 D OTH PERSN NEW SN CAT AGE
op5dsocwrkfl	R5 D LIKELY SOCIAL NETWRK MEMBER
op5dgender	R5 D GENDER UPDATE AND NEW

Flag Variables set in SN Section

fl5noonetalk	R5 F SN SP HAS NO ONE TO TALK TO
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NHATS Round 5

Section HO [HOME ENVIRONMENT]

Sequence: 9

HO1PRE

HO1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Now I have some questions about {your/SP's}{home/building}.

PRESS 1 AND ENTER TO CONTINUE

HO1

ho5entrstair

R5 HO1 ENTRANCE STAIRS OUTSIDE

QUESTION TEXT:

Thinking about the entrance that {you use/SP uses} most often, are there stairs or a step up or down to get into {your/SP's}{home/building} from outside?

CODES

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

BOX HO2

BOX HO2

NOT ON FILE

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

HO2

ho5entrccomm

R5 HO2 ENTRANCE COMMON OR PRIVAT

QUESTION TEXT:

Is this a common or shared entrance, or is it an entrance directly into {your/SP's}
{home/apartment/room/unit/suite/other}?

CODES

- 1 COMMON OR SHARED ENTRANCE
- 2 ENTRANCE DIRECTLY INTO HOME
- REFUSED
- DON'T KNOW

HO3

ho5entrnramp

R5 HO3 RAMP AT ENTRANCE

QUESTION TEXT:

Whether or not {you use/SP uses} it, does this entrance have a ramp?

CODES

- 1 YES
- 2 NO
- REFUSED

DON'T KNOW

BOX HO4**BOX HO4**

NOT ON FILE

If NEW RESIDENCE flag = 1 and STRUCTURE flag = 2 (multi-unit) and RE9= 2 (multiple floors), then go to HO4, variable text [a].

Else if NEW RESIDENCE flag = 1 and STRUCTURE flag = 2 (multi-unit) and RE9=1 (single floor), then go to HO4, variable text [c].

Otherwise, go to BOX HO5.

HO4**ho5bldgamen1**

R5 HO4A NEW RES BLDG HAS ELEVATOR

ho5bldgamen2

R5 HO4B NEW RES BLDG STAIR LIFT GLIDE

ho5bldgamen3

R5 HO4C NEW RES BLDG COMMN SPACE MEALS

ho5bldgamen4

R5 HO4D NEW RES BLDG SPACE SOCIAL EVENT

DISPLAY INSTRUCTIONS:

If at HO4a do not display brackets in question text.

If at HO4c and RE9= 1 (single floor), do not display brackets in question text.

Otherwise, display brackets.

Use "Same Question Stem" display

QUESTION TEXT:

{[]}Does the building that {you live/SP lives} in have{[]}

{variable text [a-d]}

RESPONSE [1] a. an elevator?

RESPONSE [2] b. a stair lift or stair glide?

RESPONSE [3] c. common or shared spaces that are used for meals?

RESPONSE [4] d. common or shared spaces that can be used for socializing?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

BOX HO5**BOX HO5**

NOT ON FILE

If STRUCTURE flag = 2 (multi-unit), go to HO10PRE.

Otherwise, go to HO5

HO5**ho5levelsflr**

R5 HO5 NUMBR OF LEVELS OR FLOORS

QUESTION TEXT:

How many levels or floors are in {your/SP's} home, including a basement if {you have/{he/she} has} one?

CODES

1	1	HO10PRE
2	2	
3	3	
4	4+	
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If HO5 = 1 (living space on one floor), set ONE FLOOR flag = 1

HO8**ho5homeamen1**

R5 HO8A BED KITCHN BATH SAME FLR

ho5homeamen2

R5 HO8B HOME HAS ELEVATOR

ho5homeamen3

R5 HO8C HOME HAS STAIR LFT GLIDE

DISPLAY INSTRUCTIONS:

If at HO8a, do not display brackets in question text. Otherwise, display brackets.

Use "Same Question Stem" display

QUESTION TEXT:

{{Whether or not {you use/SP uses} it, does {your/SP's} home have{{

{variable text [a-c]}

RESPONSE [1] a. a bedroom, kitchen, and full bathroom with a shower or tub on the same floor?

RESPONSE [2] b. an elevator?

RESPONSE [3] c. a stair lift or stair glide?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

HO10PRE**HO10PRE**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If HOTYPE flag = 1 (HOME), display "home".

Else if HOTYPE flag = 2 (APARTMENT), display "apartment".

Else if HOTYPE flag = 3 (ROOM), display "room".

Else if HOTYPE flag = 4 (UNIT), display "unit".

Else if HOTYPE flag = 5 (SUITE), display "suite".

Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".

QUESTION TEXT:

Now, I'd like to ask you some questions about the inside of {your/SP's}
{home/apartment/unit/suite/room/other}.

PRESS 1 AND ENTER TO CONTINUE

BOX HO10

BOX HO10

NOT ON FILE

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

HO10

ho5bathprivt

R5 HO10 NEW FAC RES PRIV BATH

DISPLAY INSTRUCTIONS:

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".

QUESTION TEXT:

Does {your/SP's}{apartment/unit/suite/room/other} have a private bathroom with a shower or tub?

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

HO11

ho5bathamen1

R5 HO11A BATH HAS BATHTUB

ho5bathamen2

R5 HO11B BATH HAS SHOWER STALL

ho5bathamen3

R5 HO11C BATH GRAB BAR IN SHOWER

ho5bathamen4

R5 HO11D BATH SEAT FR SHOWER TUB

ho5bathamen5

R5 HO11E BATH RAISED TOILET SEAT

ho5bathamen6

R5 HO11F BATH GRAB BARS TOILET

ho5bathamen7

R5 HO11G BATH MED EMERGENCY SYSTM

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1, and HO10= 1 (private shower or tub), display "the bathroom in {your /his/her} {apartment/unit/suite/room/other} have"

If FACILITY flag = 1, and HO10=2 (no private shower or tub), display "{your/his/her} bathroom have"

Otherwise display "{your/{his/her}} home"

Use "Same Question Stem" display

If at HO11a, do not display question text in brackets.
Otherwise, display question text in brackets.

For HO11b:

If HO11a = 1 (yes), display "separate from the tub".
Otherwise, use null display.

For HO11c and HO11d:

If HO11a=2 and HO11b=2 then display "PLEASE CONFIRM: {SP} HAS NO ACCESS TO A BATHTUB AND NO ACCESS TO A SHOWER" before displaying HO11e.

If HO11a= 2 (no bathtub) and HO11b = 1 (yes, shower stall), display "shower"

If HO11a = 1 (yes, bathtub) and HO11b = 2 (no shower stall), display "tub area"

If HO11a = 1 (yes, bathtub) and HO11b = 1(yes, shower stall), display "shower or tub area"

QUESTION TEXT:

{[]Whether or not {you use/SP uses} it, does {the bathroom in {your /{his/her}}
{apartment/unit/suite/room/other}/{your/{his/her}} bathroom/{your/{his/her}} home } have{[]}

{variable text [a-g]}

RESPONSE [1] a. a bathtub?

RESPONSE [2] b. a shower stall {separate from the tub}?

RESPONSE [3] c. a grab bar in the {shower/tub area/shower or tub area}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

RESPONSE [4] d. a seat for the {shower/tub/shower or tub}?

IF NEEDED: This includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

RESPONSE [5] e. a raised toilet or raised toilet seat?

RESPONSE [6] f. grab bars around the toilet?

RESPONSE [7] g. a medical emergency system to call someone for help?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

If HO11a=2 (no) and HO11b=2 (no) then set BATHGRABBAR flag=2, set BATHSEAT flag=2, and skip to HO11e.

If FACILITY flag = 1, go to HO12 after HO11f.

Otherwise, display [RESPONSE 7] and variable text {g}

If HO11c=1 (yes), set BATHGRABBAR flag = 1 (yes)

If HO11d=1 (yes), set BATHSEAT flag = 1 (yes)

If HO11e=1 (yes), set RAISED TOILET flag = 1 (yes)

If HO11f=1 (yes), set TOILETGRABBAR flag = 1 (yes)

BOX HO12

BOX HO12

NOT ON FILE

If NEW RESIDENCE flag = 1 and FACILITY FLAG = 1 (YES), GO TO HO12.
ELSE GO TO HO14.

HO12

ho5kitchnprv

R5 HO12 NEW FAC RES PRIV KITCHEN

QUESTION TEXT:

Does {your/SP's} {apartment/room/unit/suite/other} have a private kitchen or private kitchen area?

IF NEEDED: A private kitchen area is a place in your home where you can store food and prepare simple meals or snacks.

CODES

1	YES	HO14
2	NO	
	REFUSED	
	DON'T KNOW	

HO13**ho5kitchncom**

R5 HO13 NEW FAC RES COMMON KITCHEN

QUESTION TEXT:

Is there a kitchen area in the building where people who live {here/where SP lives} can store food or prepare simple meals or snacks?

CODES

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

HO14**ho5microwave**

R5 HO14 USE OF MICROWAVE

QUESTION TEXT:

(Whether or not {you use/SP uses} it,) does {your/SP's} kitchen have a working microwave?

CODES

1	YES	
2	NO	
	REFUSED	PE8
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Go to Section EM – Environment Modifications.

Derived Variables From Items in HO Section

ho5dbldg1	R5 D BLDG HAS ELEVATOR
ho5dbldg2	R5 D BLDG HAS STAIR LIFT GLIDE
ho5dbldg3	R5 D BLDG HAS COMMN SPACE MEALS
ho5dbldg4	R5 D BLDG HAS SPACE SOCIAL EVENT
ho5dbathprvt	R5 D FAC HAS PRIVATE BATH
ho5dkitchnpr	R5 D FAC HAS PRIV KITCHEN
ho5dkitchnco	R5 D FAC HAS COMMON KITCHEN

Flag Variables Set in HO Section	
f15 bathgrbbr	R5 F HO SPS BATH HAS GRAB BARS
f15 bathseat	R5 F HO SPS BATH HAS SEAT
f15 raisedtlr	R5 F HO SP HAS RAISED TOILET
f15 tlrtgrbbr	R5 F HO SP TOILET HAS GRAB BARS

NHATS Round 5

Section EM [ENVIRONMENTAL MODIFICATIONS]

Sequence: 10

BOX EM1

BOX EM1

NOT ON FILE

If NEW RESIDENCE flag <>1 (YES), go to BOX EM2.

Else if (HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES, RAMP)) or HO8b=1 (YES, ELEVATOR) or HO8c=1 (YES, STAIRLIFT) or HO11c=1 (YES, SHOWER GRABBAR) or HO11d=1 (YES, SHOWER SEAT) or HO11e=1 (YES, RAISED TOILET SEAT) or HO11f=1 (YES, TOILET GRABBAR), go to EM1.

Otherwise, go to EM4.

EM1

em5dmodhere1

R5 D EM1 NEW RES ALL ITEMS HERE

DISPLAY INSTRUCTIONS:

If HO2<>1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display “a ramp”

If HO8b=1 (YES), display “an elevator”

If HO8c=1 (YES), display “a stair lift or stair glide”

If HO11c=1 (YES), display “a grab bar in the shower or tub area”

If HO11d=1 (YES), display “a seat for the shower or tub”

If HO11e=1 (YES), display “a raised toilet or raised toilet seat”

If HO11f=1 (YES), display “grab bars around the toilet”

If only one item listed, display “Was this item” and “it”

Otherwise, display “Were all these items” and “any of them”

QUESTION TEXT:

You told me that {you have/SP has}:

{a ramp}

{an elevator}

{a stair lift or stair glide}

{a grab bar in the shower or tub area}

{a seat for the shower or tub}

{a raised toilet or raised toilet seat}

{grab bars around the toilet}

{Was this item/Were all these items} here when {you/{he/she}} moved in or did {you/{he/she}} add {it/any of them}?

CODES

1	ALL ITEMS HERE	EM4
2	ADDED ONE OR MORE ITEMS	
	REFUSED	EM4
	DON'T KNOW	EM4

BOX EM2

BOX EM2

NOT ON FILE

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 EM2.

Otherwise, go to EM4.

EM2

em5addlstyr1	R5 EM2A RAMP ADDED IN LAST YR
em5addlstyr2	R5 EM2B ELEVATOR ADDED IN LST YR
em5addlstyr3	R5 EM2C STR LIFT ADDED IN LST YR
em5addlstyr4	R5 EM2D SHWR GRABBAR ADD LST YR
em5addlstyr5	R5 EM2E BATHSEAT ADDED IN LST YR
em5addlstyr6	R5 EM2F TOILETSEAT ADD IN LST YR
em5addlstyr7	R5 EM2G TOILET GRABGARS ADDED YR

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

If NEWSAMPLE flag = 1 (YES), display "We'd like to know {if this was/ which of these were} added in the last year, that is since {CURRENT MONTH, YEAR - 1 YEAR}" and "In the last year, did {you/he she} add the".

Else if NEW RESIDENCE flag = 1 (YES), display "We'd like to know {if this was/which of these were} added to {your/SP's} current home" and " Since {you/SP} moved here, did {you/he/she}" add the"

Display "current" in underlined text.

Else if NEW RESIDENCE flag <>1 (YES) , display "Since the last interview in {LAST INT MONTH AND YEAR}, did {you/SP} add the"

If only one item listed at EM1, display "if this was".
Otherwise, display "which of these were".

If HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display RESPONSE [1] and variable text {a}

If HO8b=1 (YES), display RESPONSE [2] and variable text {b}

If HO8c=1 (YES), display RESPONSE [3] and variable text {c}

If HO11d=1 (YES), display RESPONSE [4] and variable text {d}

If HO11e=1 (YES), display RESPONSE [5] and variable text {e}

If HO11f=1 (YES), display RESPONSE [6] and variable text {f}

If HO11g=1 (YES), display RESPONSE [7] and variable text {g}

QUESTION TEXT:

{[]}{We'd like to know {if this was/which of these were} added {in the last year, that is since {CURRENT MONTH, YEAR - 1 YEAR}} to {your/SP's} current home}. { I n t h e l a s t y e a r / Since {you/SP} moved here}, did {you/he/she} add the/Since the last interview in {LAST INT MONTH AND YEAR}, did {you/SP} add the}{[]}

```
{RESPONSE [1] a. ramp?}
{RESPONSE [2] b. elevator?}
{RESPONSE [3] c. stair lift or stair glide?}
{RESPONSE [4] d. grab bar in the shower or tub area?}
{RESPONSE [5] e. seat for the shower or tub?}
{RESPONSE [6] f. raised toilet or raised toilet seat?}
{RESPONSE [7] g. grab bars around the toilet?}
```

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX EM3

BOX EM3

NOT ON FILE

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

EM3

em5payyufam1	R5 EM3A SP PAID FOR RAMP
em5payyufam2	R5 EM3B SP PAID FOR ELEVATOR
em5payyufam3	R5 EM3C SP PAID STAIR LFT GLIDE
em5payyufam4	R5 EM3D SP PAID SHOWER GRABBAR
em5payyufam5	R5 EM3E SP PAID SHOWER SEAT
em5payyufam6	R5 EM3F SP PAID RAISD TOILT SEAT
em5payyufam7	R5 EM3G SP PAID TOILET GRABBAR

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

Otherwise, display question text in brackets.

If EM2a = 1 (YES), display RESPONSE [1] and variable text {a}

If EM2b = 1 (YES), display RESPONSE [2] and variable text {b}

If EM2c = 1 (YES), display RESPONSE [3] and variable text {c}

If EM2d = 1 (YES), display RESPONSE [4] and variable text {d}

If EM2e = 1 (YES), display RESPONSE [5] and variable text {e}

If EM2f = 1 (YES), display RESPONSE [6] and variable text {f}

If EM2g = 1 (YES), display RESPONSE [7] and variable text {g}

QUESTION TEXT:

{{Did {you/SP} or {your/{his/her}} family pay any of the cost of adding or getting the{{}}

{RESPONSE [1] a. ramp?}

{RESPONSE [2] b. elevator?}

{RESPONSE [3] c. stair lift or stair glide?}

{RESPONSE [4] d. grab bar in the shower or tub area?}

{RESPONSE [5] e. seat for the shower or tub?}

{RESPONSE [6] f. raised toilet or raised toilet seat?}

{RESPONSE [7] g. grab bars around the toilet?}

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

EM4	em5paydevice1	R5 EM4A SP PAID FOR VISION AIDS
	em5paydevice2	R5 EM4B SP PAID FOR HEARING AID
	em5paydevice3	R5 EM4C SP PAID FOR CANE
	em5paydevice4	R5 EM4D SP PAID FOR WALKER
	em5paydevice5	R5 EM4E SP PAID FOR WHEELCHAIR
	em5paydevice6	R5 EM4F SP PAID FOR SCOOTER
	em5paydevice7	R5 EM4G SP PAID FOR GRABBER
	em5paydevice8	R5 EM4H SP PD SPECIAL DRESS ITM
	em5paydevice9	R5 EM4I SP PAID ADAPTED UTENSILS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at EM4a, do not display question text in brackets.

Otherwise, display question text in brackets.

If NEWSAMPLE flag = 1 (YES), display "in the last year".

Otherwise, display "since the last interview in {LAST IN MONTH AND YEAR}".

Display "pay anything for" in bold underlined text.

QUESTION TEXT:

{{Here are a few other devices that help with daily activities. Whether or not {you use/SP uses} them now, {in the last year/since the last interview in {LAST INT MONTH AND YEAR}}, did {you/{he/she}} or {your/{his/her}} family pay anything for the following items for {you/{him/her}}?{{}}

{variable text [a-i]}

RESPONSE [1] a. glasses or other vision aids such as a magnifying glass?

RESPONSE [2] b. a hearing aid?

RESPONSE [3] c. a cane?

RESPONSE [4] d. a walker?
 RESPONSE [5] e. a wheelchair?
 RESPONSE [6] f. a scooter?
 RESPONSE [7] g. a reacher or grabber to pick up things more easily?
 RESPONSE [8] h. special items to help with dressing, such as button hooks or clothes that are designed to get on and off easily?
 RESPONSE [9] i. adapted utensils to help {you/SP} to eat or cut {your/{his/her}} food?

IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

CODES

1 YES
 2 NO
 REFUSED
 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

EM5

em5payaltgth

R5 EM5 PAY FOR THESE ALTOGETHER

DISPLAY INSTRUCTIONS:

If EM3a=1 (YES), display “ramp”
 If EM3b=1 (YES), display “elevator”
 If EM3c=1 (YES), display “stair lift or stair glide”
 If EM3d=1 (YES), display “grab bar in the shower or tub area”
 If EM3e=1 (YES), display “seat for the shower or tub”
 If EM3f=1 (YES), display “raised toilet or raised toilet seat”
 If EM3g=1 (YES), display “grab bars around the toilet”
 If EM4a=1 (YES), display “glasses or other vision aids”
 If EM4b=1 (YES), display “hearing aid”
 If EM4c=1 (YES), display “cane”
 If EM4d=1 (YES), display “walker”
 If EM4e=1 (YES), display “wheelchair”
 If EM4f=1 (YES), display “scooter”
 If EM4g=1 (YES), display “reacher or grabber”
 If EM4h=1 (YES), display “special items to help with dressing”
 If EM4i=1 (YES), display “adapted utensils”

If more than one item displayed, display commas between each one and display "and" before the last display text.

If NEWSAMPLE flag = 1 (YES), display “in the last year”.

Otherwise, display “since the last interview in {LAST INT MONTH AND YEAR}”.

QUESTION TEXT:

Thinking about the {ramp} {elevator} {stair lift or stair glide} {grab bar in the shower or tub area} {seat for the shower or tub} {raised toilet or raised toilet seat} {grab bars around the toilet} {glasses or vision aids} {hearing aid} {cane} {walker} {wheelchair} {scooter} {reacher or grabber} {special items to help with dressing} {adapted utensils} that {you/SP} (and {your/{his/her}} family) paid for {in the last year/ since the last interview in {LAST INT MONTH AND YEAR}}, about how much was that altogether? Was it more than \$500, less than \$500, or just about \$500?

CODES

1 MORE THAN \$500

3	LESS THAN \$500	EM7
	JUST ABOUT \$500	Section CM
	REFUSED	Section CM
	DON'T KNOW	Section CM

PROGRAMMER INSTRUCTIONS:

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

EM6	em5morls1000	R5 EM6 MORE LESS OR ABOUT \$1000
------------	---------------------	----------------------------------

QUESTION TEXT:

Was it more than \$1000, less than \$1,000, or just about \$1,000?

CODES

1	MORE THAN \$1,000	Section CM
2	LESS THAN \$1,000	Section CM
3	JUST ABOUT \$1,000	Section CM
	REFUSED	Section CM
	DON'T KNOW	Section CM

EM7	em5morls100	R5 EM7 MORE LESS OR ABOUT \$100
------------	--------------------	---------------------------------

QUESTION TEXT:

Was it more than \$100, less than \$1,00, or just about \$1,00?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section CM – Community.

NHATS Round 5

Section CM [COMMUNITY]

Sequence: 11

CM1PRE

CM1PRE

NOT ON FILE

Now I'm going to read some statements about the community where {you live/SP lives}.

PRESS 1 AND ENTER TO CONTINUE

CM1

cm5knowwell

R5 CM2 PEOPPL KNOW EACH OTHR WELL

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

QUESTION TEXT:

People in {this/SP's} community know each other very well. Do you agree a lot, a little, or do you not agree?

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

CM2

cm5willnghlp

R5 CM2 PEOPPL WILLG HLP EACH OTHR

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

QUESTION TEXT:

People in {this/SP's} community are willing to help each other. [Do you agree a lot, a little, or do you not agree?]

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

CM4

cm5peoptrstd

R5 CM4 PEOPLE CAN BE TRUSTED

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

Display CM1, 2, and 4 on the same screen.

QUESTION TEXT:

People in {this/SP's} community can be trusted. [Do you agree a lot, a little, or do you not agree?]

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

GO TO SECTION TE – TECHNOLOGICAL ENVIRONMENT

NHATS Round 5

Section TE [TECHNOLOGICAL ENVIRONMENT]

Sequence: 12

TE1PRE

TE1PRE

NOT ON FILE

QUESTION TEXT:

Now I have a few questions about the phones and computers {you/SP} may have in {your/his/her} {home/apartment/room/unit/suite/other}.

PRESS 1 AND ENTER TO CONTINUE

TE1

te5cellphone

R5 TE1 WORKING CELL PHONE

QUESTION TEXT:

{Do you/Does SP} have a working cell phone?

IF NEEDED: A cell phone is a phone that you can use anywhere you go.

CODES

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

TE3

te5othrphone

R5 TE3 ONE PHONE OTHER THAN CELL

QUESTION TEXT:

Is there at least one working telephone in {your/SP's} {home/apartment/room/unit/suite/other} that is not a cell phone?

CODES

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

TE6

te5computer

R5 TE6 HAS A WORKING COMPUTER

QUESTION TEXT:

{Do you/Does SP} have a working computer in {your/his/her} {home/apartment/room/unit/suite/other}?

IF NEEDED: Please include desktops and laptop computers only, not cell phones that go on the Internet or online.

CODES

- | | | |
|---|---|------|
| 1 | YES | TE8A |
| 2 | NO | |
| 7 | YES, DOESN'T KNOW HOW TO USE A COMPUTER | TE8A |
| | REFUSED | |
| | DON'T KNOW | |

TE8

te5compoth

R5 TE8 USED COMPUTER ANYWHRE ELS

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display "in {your/his/her} building,".

QUESTION TEXT:

In the last month, {have you/has SP} used a computer anywhere else?

IF NEEDED: Other places include {in {your/his/her} building,} at a library, or at a friend or family member's home.

CODES

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

TE8A**te5**tablet

R5 TE8A SP HAS A TABLET COMPUTER

QUESTION TEXT:

{Do you/Does SP} have a tablet computer like the iPad that works by touching the screen?

IF NEEDED: By tablet computer we mean devices like the iPad, Kindle Fire, Galaxy, or Xoom that let you go online and that work by touching the screen. Do not include eBook readers like the Nook or Kindle.

CODES

- | | |
|---|------------------------------|
| 1 | YES |
| 2 | NO |
| 7 | YES, DOESN'T KNOW HOW TO USE |
| | REFUSED |
| | DON'T KNOW |

BOX TE9**BOX TE9**

NOT ON FILE

If TE1 = 2 (NO CELL PHONE) and TE6 = 2 (NO COMPUTER) and TE8 = 2 (NO COMPUTER USE ELSEWHERE) and [TE8A=2 (NO TABLET COMPUTER) or TE8A=7 (YES, DOESN'T KNOW HOW TO USE)], go to Section MD – Mobility Devices.

If TE1 = 2 (NO CELL PHONE) and TE6 = 7 (DOESN'T KNOW HOW TO USE COMPUTER) and [TE8A=2 (NO TABLET COMPUTER) or TE8A=7 (YES, DOESN'T KNOW HOW TO USE)], go to Section MD – Mobility Devices.

Otherwise, go to TE9.

TE9**te5**emailtext

R5 TE9 EMAIL OR TEXTING

QUESTION TEXT:

In the last month, {have you/has SP} ever sent messages by email or texting?

IF NEEDED: Texting is like email but usually done on a phone.

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | TE11 |
| | REFUSED | TE11 |
| | DON'T KNOW | TE11 |

TE10**te5**oftnemail

R5 TE10 EMAIL OR TEXTING OFTEN

QUESTION TEXT:

In the last month, how often did {you/SP} send messages by email or texting? Would you say most days, some days or rarely?

CODES

- | | |
|---|------------|
| 1 | MOST DAYS |
| 2 | SOME DAYS |
| 3 | RARELY |
| | REFUSED |
| | DON'T KNOW |

TE11**te5online**

R5 TE11 ONLINE COMPUTER USE

DISPLAY INSTRUCTIONS:

If TE9 = 1 (YES), display "Besides email or texting," and "other".

QUESTION TEXT:

In the last month, {besides email or texting, }{have you/has SP} ever gone on the Internet or online for any {other} reason?

CODES

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

TE12**te5shoponli1**

R5 TE12A INTERNET SHOP GROCERY

te5shoponli2

R5 TE12B INTERNET BANKING

te5shoponli3

R5 TE12C INTERNET ORDR REFLL RX

te5socialnet

R5 TE12D SOCIAL NETWORK SITES

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at TE12a, do not display question text in brackets.
Otherwise, display question text in brackets

QUESTION TEXT:

{{}}In the last month, {have you/has SP} gone on the Internet or online to{{}}

{variable text [a-D]}

RESPONSE [1] a. shop for groceries or personal items?

IF NEEDED: By personal items, we mean things like toiletries that you can buy at the grocery or drug store?

RESPONSE [2] b. pay bills or do banking?

RESPONSE [3] c. order or refill prescriptions?

RESPONSE [4] d. visit social network sites?

IF NEEDED: These include sites where you can keep in touch with friends, like Facebook or LinkedIn.

CODES

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

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

TE13	te5intrntmd1	R5 TE13A INTERNET MEDICAL PROVDR
	te5intrntmd2	R5 TE13B INTERNET INSURANCE INFO
	te5intrntmd3	R5 TE13C INTERNET HEALTH CONDS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display
Display "year" in underlined text.

If at TE13a, do not display question text in brackets. Otherwise, display question text in brackets

QUESTION TEXT:

{[] In the last year, {have you/has SP} gone on the Internet or online to {}

{variable text [a-c]}

RESPONSE [1] a. contact any of {your/his/her} medical providers?

IF NEEDED: This includes making or changing medical appointments, getting test results, requesting referrals or prescriptions, or to get advice.

RESPONSE [2] b. handle Medicare or other health insurance matters?

IF NEEDED: This includes going to Medicare's website or another insurer's website to find out what is covered, compare plans or providers, find out about bills, or file a claim.

RESPONSE [3] c. get information about {your/his/her} health conditions?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

GO TO SECTION MD – Mobility Devices

NHATS Round 5

Section MD [MOBILITY DEVICES]

Sequence: 13

BOX MD1PRE

BOX MD1PRE

NOT ON FILE

If DECEASED flag = 1 (YES) and NOTMOBILE flag = 1 (YES), go to Section SC - Self Care Activities.
Otherwise, go to MD1PRE.

MD1PRE

MD1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "SP may have used".
Otherwise, display "you use/SP uses".

QUESTION TEXT:

The next questions are about items that {you use/SP uses} {SP may have used} to help {you/him/her} get around more easily, safely, or on {your/his/her} own.

PRESS 1 AND ENTER TO CONTINUE

MD1

md5canewlker

R5 MD1 USED CANE WALKER WHLCHAIR

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life, did {SP} use". Otherwise, display ", have you/has {SP} used".

QUESTION TEXT:

In the last month {of {his/her} life, did {SP} use/, {have you/has {SP} used} a cane, walker, wheelchair, or scooter, yes or no?

PRESS F1 FOR HELP SCREEN

CODES

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

BOX MD2

BOX MD2

NOT ON FILE

If DECEASED flag = 1 (YES), and MD1 = 2 (NO), DK, or RF, go to Section CP - Cognition (Proxy).
Else if MD1 = 2 (NO), DK, or RF, go to Section SS - Sensory Impairments and Symptoms.
Otherwise, go to MD2.

MD2

md5cane

R5 MD2 USED A CANE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

QUESTION TEXT:

In the last month {of {his/her} life}, which did {you/SP} use?
a cane?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

MD3**md5walker**

R5 MD3 USED A WALKER

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

QUESTION TEXT:

In the last month {of {his/her} life}, which did {you/SP} use?

a walker?

IF NEEDED: This includes standard walkers without wheels, rolling and wheeled walkers, and rollators.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

MD4**md5wheelchar**

R5 MD4 USED A WHEELCHAIR

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

QUESTION TEXT:

In the last month {of {his/her} life}, which did {you/SP} use?

a walker?

IF NEEDED: This includes standard walkers without wheels, rolling and wheeled walkers, and rollators.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX MD4A**BOX MD4A**

NOT ON FILE

If DECEASED flag = 1 (YES), go to MD5.

Else if MD4 = 1 (YES), go to MD4a.

Otherwise, go to MD5.

MD4A**md5wheelcrspc**

R5 MD4A WHEELCHAIR IN LIVNG SPACE

DISPLAY INSTRUCTIONS:

Display image of wheelchair.

QUESTION TEXT:

{Do you/does SP} have that wheelchair with {you/him/her} where {you live/SP lives}?

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

MD5**md5scooter**

R5 MD5 USE A SCOOTER

DISPLAY INSTRUCTIONS:

Display image of scooter.

If DECEASED flag = 1 (YES), display "of {his/her} life".

QUESTION TEXT:

SHOW CARD MD2

[In the last month {of {his/her} life}, did {you/SP} use]

a scooter?

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

CODES

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

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set SCOOTER flag = 1 (yes)

If MD1 = 1 (used device in last month) and MD2 = 2 (didn't use cane) and MD3 = 2 (didn't use walker) and MD4 = 2 (didn't use wheelchair) and MD5 = 2 (didn't use scooter), display error message #7.

BOX MD5A**BOX MD5A**

NOT ON FILE

If DECEASED flag = 1 (YES), go to Section CP - Cognition (Proxy).

Else if MD5 = 1, go to MD5a.

Otherwise, go to Section SS - Sensory Impairments and Symptoms.

DISPLAY INSTRUCTIONS:

Display image of scooter.

QUESTION TEXT:

{Do you/Does SP} have that (power) scooter with {you/him/her} where {you live/he lives/she lives}?

CODES

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

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set SCOOTERHOME flag = 1 (yes)

Flag Variables Set in MD Section

fl5cane	R5 F MD SP USES CANE
fl5walker	R5 F MD SP USES WALKER
fl5wheelchr	R5 F MD SP USES WHEELCHAIR
fl5whlchrhom	R5 F MD SP HAS WHEELCHR AT HOME
fl5scooter	R5 F MD SP USES SCOOTER
fl5scooterho	R5 F MD SP USES SCOOTER AT HOME

NHATS Round 5

Section SS [SENSORY IMPAIRMENTS AND SYMPTOMS]

Sequence: 14

SS3PRE

SS3PRE

NOT ON FILE

QUESTION TEXT:

Now let's talk about how well {you hear/SP hears}.

PRESS 1 AND ENTER TO CONTINUE

SS3

ss5heringaid

R5 SS3 HEARING AID USED

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "In the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {have you/has {he/she}} used a hearing aid or other hearing device?

CODES

- | | | |
|---|------------|--------|
| 1 | YES | |
| 2 | NO | |
| 7 | DEAF | SS7PRE |
| | REFUSED | |
| | DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

IF SS3 = 7 (DEAF), set DEAF flag = 1 (YES)

SS4A

ss5hearphone

R5 SS4A SP CAN USE TELEPHONE

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}... "

ELSE DISPLAY "{Do you/Does SP}..."

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to use the telephone?

CODES

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

SS4B

ss5convwradi

R5 SS4B CONVERSATION WITH TV RADIO

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}... "

ELSE DISPLAY "{Do you/Does SP}..."

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to carry on a conversation in a room with a radio or TV playing?

CODES

1	YES	SS7PRE
2	NO	
	REFUSED	
	DON'T KNOW	

SS4C**ss5convquiet**

R5 SS4C CONVERS IN QUIET ROOM

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}..."

ELSE DISPLAY "{Do you/Does SP}..."

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to carry on a conversation in a quiet room?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS7PRE**SS7PRE**

NOT ON FILE

Now I have a few questions about how well {you/SP} can see.

PRESS 1 AND ENTER TO CONTINUE

SS7**ss5glasseswr**

R5 SS7 WEARS GLASSES CONTACTS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "at a distance" IN BOLD UNDERLINE TEXT

QUESTION TEXT:

{Do you/Does SP} wear glasses or contacts to help {you/him/her} see things at a distance?

CODES

1	YES	
2	NO	
7	BLIND	SS13PRE
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If SS7 = 7 (BLIND), set BLIND flag = 1 (YES).

SS8A**ss5seewellst**

R5 SS8B SEES ACROSS THE STREET

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

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

ELSE DISPLAY "{Do you/Does SP}..."

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to recognize someone across the street?

CODES

- | | | |
|---|------------|------|
| 1 | YES | Ss10 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

SS8B

ss5seestvgls

R5 SS8B TV ACROSS ROOM W GLASSES

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

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

ELSE DISPLAY "{Do you/Does SP}..."

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to watch television across the room?

CODES

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

SS10

ss5glasscls

R5 SS10 WEAR GLS CONTCS SEE CLOS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "close up" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

{Do you/Does SP} wear glasses or contacts to help {you/him/her} see things close up?

CODES

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

SS11

ss5othvisaid

R5 SS11 USED OTHER VISION AIDS

QUESTION TEXT:

In the last month, did {you/SP} use other vision aids such as a magnifying glass to help {you/him/her} see things close up?

IF NEEDED: Vision aids include things like a magnifying glass, large-print books, and other tools to help people with vision impairments.

CODES

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

SS12

ss5glrednewp

R5 SS12 CAN READ NEWSPAPER PRINT

DISPLAY INSTRUCTIONS:

IF SS10 =1 (GLASSES OR CONTACTS FOR CLOSE UP)) AND SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} glasses or contacts and vision aids", and "do you/does {he/she}"

ELSE IF SS10=1 (GLASSES OR CONTACTS FOR CLOSE UP) AND SS11 <> 1 DISPLAY "When {you use/SP uses} glasses or contacts", and "do you/does {he/she}"

ELSE IF SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} vision aids", and "do you/does {he/she}"

ELSE DISPLAY "{Do you/Does SP}"

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts/When {you use/SP uses} vision aids/When {you use/SP uses} glasses or contacts and vision aids}, {{do you/does {he/she}} /{Do you/Does SP}} see well enough to read newspaper print?

CODES

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

SS13PRE

SS13PRE

NOT ON FILE

QUESTIONS TEXT:

Now I have some questions about health related problems that {you/SP} may have had in the last month.

PRESS 1 AND ENTER TO CONTINUE

SS13

ss5probchswl

R5 SS13 PROBLEMS CHEW OR SWALLOW

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} have problems with chewing or swallowing that caused difficulty when {you/he/she} ate?

CODES

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

SS14

ss5probspeak

R5 SS14 PROBLEMS SPEAKING

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month because of {your/SP's} health, did {you/he/she} have any problems in speaking or in making {yourself/herself/himself} understood when {you talk/he talks/she talks)?

CODES

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

SS15**ss5painbothr**

R5 SS15 BOTHERED BY PAIN

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {have you/has {he/she}} been bothered by pain?

CODES

- | | | |
|---|------------|-------|
| 1 | YES | |
| 2 | NO | SS18A |
| | REFUSED | SS19 |
| | DON'T KNOW | SS19 |

SS17**ss5painlimts**

R5 SS17 PAIN EVER LIMTS ACTIVIT

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, has pain ever limited {your/SP's} activities?

CODES

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

SS18A**ss5painmedof**

R5 SS18A LST MNTH OFTEN PAIN MED

QUESTION TEXT:

SHOWCARD SS1

In the last month, how often did {you/SP} take medication for pain? Would you say every day, most days, some days, rarely or never?

IF NEEDED: Include medications {you/{he/she}} took to treat or prevent pain.

CODES

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

BOX SS18B**BOX SS18B**

NOT ON FILE

If SS15=1 (PAIN) or SS18A=1 (PAIN MEDS EVERY DAY), 2 (PAIN MEDS MOST DAYS), 3 (PAIN MEDS SOME DAYS), or 4 (PAIN MEDS RARELY), go to SS18B
Otherwise, go to SS19

SS18B

ss5painwhe1	R5 SS18B BACK PAIN IN LAST MNTH
ss5painwhe2	R5 SS18B HIP PAIN IN LAST MONTH
ss5painwhe3	R5 SS18B KNEE PAIN INLAST MNTH
ss5painwhe4	R5 SS18B FOOT PAIN IN LAST MNTH
ss5painwhe5	R5 SS18B HAND PAIN IN LAST MNTH
ss5painwhe6	R5 SS18B WRIST PAIN IN LAST MNTH
ss5painwhe7	R5 SS18B SHOULDR PAIN LAST MNTH
ss5painwhe8	R5 SS18B HEAD PAIN IN LAST MNTH
ss5painwhe9	R5 SS18B NECK PAIN IN LAST MNTH
ss5painwhe10	R5 SS18B ARM PAIN IN LAST MNTH
ss5painwhe11	R5 SS18B LEG PAIN IN LAST MNTH
ss5painwhe12	R5 SS18B STOMACH PAIN LAST MNTH
ss5painwhe13	R5 SS18B OTHR SPCFY PAIN LST MO

QUESTION TEXT:

SHOW CARD SS2

Please look at this card and tell me where {you have/SP has} had pain in the last month.

IF NEEDED: Include places for which {you/{he/she}} took medications to treat or prevent pain.

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	BACK	SS19
2	HIPS	SS19
3	KNEES	SS19
4	FEET	SS19
5	HANDS	SS19
6	WRISTS	SS19
7	SHOULDERS	SS19
8	HEAD	SS19
9	NECK	SS19
10	ARMS	SS19
11	LEGS	SS19
12	STOMACH	SS19
91	OTHER PLACES (SPECIFY)	

SS18C**SS18C**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PLACES SP HAD PAIN

ENTER TEXT

Length

50

SS19

ss5probbreat

R5 SS19 BREATHING PROBLEMS

QUESTION TEXT:

In the last month, did {you/SP} have any breathing problems, including shortness of breath or difficulty breathing?

CODES

1	YES	
2	NO	SS21
	REFUSED	SS21
	DON'T KNOW	SS21

SS20

ss5prbbrlimt

R5 SS20 BREATH PROBLEMS LIMIT ACTIV

QUESTION TEXT:

In the last month, did {your/SP's} breathing problems ever limit {your/his/her} activities?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

SS21

ss5strnglmup

R5 SS21 UPPER BODY STRENGTH LIMIT

QUESTION TEXT:

In the last month, did {you/SP} have limited strength or movement in {your/his/her} shoulders, arms, or hands?

CODES

1	YES	
2	NO	SS23
	REFUSED	SS23
	DON'T KNOW	SS23

SS22

ss5uplimtact

R5 SS22 UP BODY STRENGTH LIMIT 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

ss5lwrbdstr

R5 SS23 LOWER BODY STRENGTH LIMIT

QUESTION TEXT:

In the last month, did {you/SP} have limited strength or movement in {your/his/her} hips, legs, knees, or feet?

CODES

1	YES	
2	NO	SS25
	REFUSED	SS25
	DON'T KNOW	SS25

SS24**ss5lwrbodimp**

R5 SS24 LWER BOD STRNGTH IMT ACT

QUESTION TEXT:

In the last month, did this problem with {your/SP's} hips, legs, knees, or feet ever limit {your/his/her} activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS25**ss5lowenergy**

R5 SS26 LOW ENERGY IN LAST MONTH

QUESTION TEXT:

In the last month, did {you/SP} have low energy or {were you/was SP} easily exhausted?

CODES

1	YES	
2	NO	SS27
	REFUSED	SS27
	DON'T KNOW	SS27

SS26**ss5loenlmtat**

R5 SS26 LOW ENERGY EVER LIM ACT

QUESTION TEXT:

In the last month, did {your/SP's} low energy or exhaustion ever limit {your/his/her} activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS27**ss5prbbalcrd**

R5 SS27 BALANCE OR COORD PROBS

QUESTION TEXT:

In the last month, did {you/SP} have problems with balance or coordination?

CODES

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

SS28**ss5prbbalcnt**

R5 SS28 BAL COORD PROB LIMIT ACT

QUESTION TEXT:

In the last month, did {your/SP's} balance or coordination problems ever limit {your/SP's} activities?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section PC – Physical Capacity

Flag Variables Set in SS Section	
f15deaf	R5 F SS DEAF PRIOR OR CURRENT ROUND
f15blind	R5 F SS BLIND PRIOR OR CURRENT ROUND

NHATS Round 5

Section PC [PHYSICAL CAPACITY]

Sequence: 15

PC1PRE

PC1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

QUESTION TEXT:

We are interested in whether {you have /SP has} difficulty with physical movements when {you do/he does/she does} them without help from another person {and without {your/his/her}{cane/walker/cane or walker}}.

PRESS 1 AND ENTER TO CONTINUE

PC1

pc5walk6blks

R5 PC1 ABLE TO WALK 6 BLOCKS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...".

DISPLAY TEXT "able" and "6 blocks" and "without" AS BOLD UNDERLINED TEXT

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

QUESTION TEXT:

In the last month, {were you/was SP} able to... walk 6 blocks, or about half a mile, by {yourself/himself/herself} {and without {your/his/her}{cane/walker/cane or walker}}?

CODES

1	YES	PC3
2	NO	
	REFUSED	
	DON'T KNOW	

PC2

pc5walk3blks

R5 PC2 ABLE TO WALK 3 BLOCKS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...".

DISPLAY TEXT "able" and "3 blocks" and "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk 3 blocks by {yourself/himself/herself}{and without {your/his/her}{cane/walker/cane or walker}}?

CODES

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

PC3**pc5up2ostair**

R5 PC3 ABLE TO WALK UP 20 STAIRS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane".

DISPLAY TEXT "able" and "20 stairs" and "without" AS BOLD UNDERLINED TEXT.

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk up 20 stairs (about two flights) by {yourself/himself/herself}{and without {your/his/her} cane}?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | PC5 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |

PC4**pc5up1ostair**

R5 PC4 ABLE TO WALK UP 10 STAIRS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "able" and "10 stairs" AND "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane".

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk up 10 stairs by {yourself/himself/herself}{and without {your/his/her} cane}?

CODES

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

PC5**pc5car2opnds**

R5 PC5 ABLE TO CARRY 20 POUNDS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".

ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

DISPLAY TEXT "able" and "20 pounds" AS BOLD UNDERLINED TEXT.

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] lift and carry 20 pounds, or two full bags of groceries, by {yourself/himself/herself} {and without {your/his/her}{cane/walker/cane or walker}}?

CODES

1	YES	PC7
2	NO	
	REFUSED	
	DON'T KNOW	

PC6

pc5car10pnob

R5 PC6 CARRY A 10 POUND OBJECT

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

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

IF CANE FLAG=1 (YES) AND WALKER FLAG <> 1 (YES), DISPLAY "cane".
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker".
ELSE IF CANE FLAG <> 1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "walker".

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] lift and carry a 10-pound object by {yourself/himself/herself} {and without {your/his/her}{cane/walker/cane or walker}}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PC7

pc5geonknees

R5 PC7 ABLE TO GET DOWN ON KNEES

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT.

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] get down on {your/his/her} knees and get back up without holding on to anyone or anything?

CODES

1	YES	PC9
2	NO	
	REFUSED	
	DON'T KNOW	

PC8

pc5bendover

R5 PC8 ABLE TO BEND OVER

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**pc5hvobovrhd**

R5 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**pc5rechovrhd**

R5 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**pc5opnjarwhd**

R5 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 |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

SECTION CP

PC12**pc5grspsmobj**

R5 PC12 ABLE GRASP SMALL OBJECTS

DISPLAY INSTRUCTIONS:

DISPLAY "able" IN BOLD UNDERLINED TEXT.

QUESTION TEXT:

[In the last month, {were you/was SP} able to ...] use {your/his/her} fingers to grasp or handle small objects?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section CP – Cognition (Proxy)

NHATS Round 5

Section CP [COGNITION (PROXY)]

Sequence: 16

BOX CP1PRE

BOX CP1PRE

NOT ON FILE

If DECEASED flag = 1 (YES) and NOTALERT flag = 1 (YES), go to Section CL - Closing.
Else if DECEASED flag = 1 (YES), go to CP1.
Else if PROXY flag = 1 (YES), go to CP1PRE.
Otherwise, go to Section CG Cognition (SP).

CP1PRE

CP1PRE

NOT ON FILE

QUESTION TEXT:

Part of this study is concerned with people's memory and ability to think about things.

PRESS 1 AND ENTER TO CONTINUE

CP1

cp5memrygood

R5 CP1 HOW GOOD MEMRY AT PRESENT

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "Next, how would you rate {SP}'s memory in the month before {he/she} died" and "was".
Otherwise, display "First, how would you rate {SP}'s memory at the present time".
DISPLAY "at the present time" IN BOLD UNDERLINED TEXT.

QUESTION TEXT:

{First, how would you rate {SP}'s memory at the present time/Next, how would you rate {SP}'s memory in the month before {he/she} died}? Would you say it {is/was} excellent, very good, good, fair, or poor?

CODES

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

BOX CP2

BOX CP2

NOT ON FILE

If DECEASED flag = 1 (YES), go to Section MO - Mobility.
Else if the PERSON ROSTER MEMBER flagged as the CURRENT INT PROXY was flagged as the LAST INT PROXY, go to CP3PRE.

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

CP2

cp5knownspyr

R5 CP2 KNOWN SP 4 AT LEAST A YR

DISPLAY INSTRUCTIONS:

Spell out month in question text (for example, display "March" rather than "3")

QUESTION TEXT:

Have you known {SP} for at least 1 year, that is since {CURRENT MONTH, YEAR - 1 year}?

CODES

- 1 YES
2 NO
REFUSED
DON'T KNOW

CP3PRE	CP3PRE	NOT ON FILE
---------------	---------------	-------------

DISPLAY INSTRUCTIONS:

If CP2 = 1 (KNOWN AT LEAST 1 YEAR) or IS9 = 2-29, 91 (PROXY IS RELATIVE), display “in the last several years”. Otherwise, display “since you have known {him/her}”.

QUESTION TEXT:

Now, I'd like to ask some questions about whether you have noticed any changes in {SP} {in the last several years/since you have known {him/her}} due to thinking or memory problems.

PRESS 1 AND ENTER TO CONTINUE

BOX CP3	BOX CP3	NOT ON FILE
----------------	----------------	-------------

If any of LAST INT CP3{a-h} = 3 (DEMENTIA, ALZHEIMERS REPORTED BY PROXY), go to CP4.

Otherwise, go to CP3.

CP3	cp5chgthink1	R5 CP3A SP DIFF REMEMBER DATE
	cp5chgthink2	R5 CP3B SP REPEATS SELF
	cp5chgthink3	R5 CP3C SP DIFF REMBER APPT
	cp5chgthink4	R5 CP3D SP CHNG INTRST ACT HOB
	cp5chgthink5	R5 CP3E SP DIFF WITH MONEY MGMT
	cp5chgthink6	R5 CP3F SP DIFF LEARNNG USE TOOL
	cp5chgthink7	R5 CP3G SP PRBLMS WITH JDGMT
	cp5chgthink8	R5 CP3H SP DLY PRBLMS W THNK MEM
	cp5dad8dem	R5 D DEMENTIA REPORTED IN PRIOR AD8

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If CP2 = 1 (KNOWN AT LEAST 1 YEAR) or IS9 = 2-29, 91 (PROXY IS RELATIVE), display “in the last several years”. Otherwise, display “since you have known {him/her}”.

Display the current response item text as a fill in the "IF NEEDED" statement.

If at CP3a-g, display “caused by a thinking or memory problem in {variable text [a-g]}”

Else if at CP3h display “in {variable text [h]}”

If at CP3a, do not display question text in brackets.

Otherwise, display question text in brackets.

If at CP3a, display “first”

If at CP3b-CP3g, display “next”

If at CP3h, display “last”

QUESTION TEXT:

{[I]}I'll read some statements about {him/her}. If there has been a change { in the last several years/since you have known {him/her}} caused by {his/her} thinking or memory problems, please say "Yes."

Otherwise say "No."{}}}

The {first/next/last} item is....

{variable text [a-h]}

IF NEEDED: Has there been a change caused by a thinking or memory problem in {variable text [a-g]]}{variable text[h]]}?

RESPONSE [1] a. remembering the month or year
 RESPONSE [2] b. repeating questions, stories, or statements
 RESPONSE [3] c. amount of difficulty remembering appointments
 RESPONSE [4] d. amount of interest in hobbies or activities
 RESPONSE [5] e. amount of difficulty handling money matters like balancing a checkbook or paying bills
 RESPONSE [6] f. amount of trouble learning how to use a tool, appliance or gadget, for example a TV remote control or microwave
 RESPONSE [7] g. problems with judgment, for example falling for scams or buying inappropriate gifts
 RESPONSE [8] h. daily problems with thinking or memory

CODES

- | | |
|---|--|
| 1 | YES, A CHANGE |
| 2 | NO, NO CHANGE |
| 3 | 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	cp5memcogpr1	R5 CP4A LOST IN FAMILIAR ENVIRON
	cp5memcogpr2	R5 CP4B SP WANDERED OFF NO RETRN
	cp5memcogpr3	R5 CP4C SP ABLE LEFT ALONE 1 HR
	cp5memcogpr4	R5 CP4D SP HEARS SEES THNGS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at CP4a, do not display question text in brackets
 Otherwise display question text in brackets

QUESTION TEXT:

{[]} I have a few other questions. In the last year... {}}

{variable text [a-d]}

RESPONSE[1] a. did {he/she} ever get lost in a familiar environment?
 RESPONSE[2] b. did {he/she} ever wander off and not return by {himself/herself}?
 RESPONSE[3] c. was {he/she} able to be left alone for an hour or so?
 RESPONSE[4] d. did{he/she} hear or see things that were not really there?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

GO TO SECTION CG - COGNITION (SP)

Derived Variables From Items in CP Section	
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cp5dad8dem	R5 D DEMENTIA REPORTED IN PRIOR AD8
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NHATS Round 5

Section CG [COGNITION (SP)]

Sequence: 17

BOX CG1PRE

BOX CG1PRE

NOT ON FILE

If PROXY flag = 1 (yes), go to CG1APRE.

Otherwise go to CG2PRE.

CG1APRE

CG1APRE

NOT ON FILE

QUESTION TEXT:

There are a few questions that I would like to ask {SP} so that the study can better understand memory in people {his/her} age. Some may be hard to answer, but it is important to the study that we ask these.

PRESS 1 AND ENTER TO CONTINUE

CG1A

cg5speaktoSP

R5 CG1A SPEAK TO SP ASK QUES

QUESTION TEXT:

May I speak to {SP} and ask {him/her} a few questions?

CODES

1 YES
2 NO

CG1D

CG1B

CG1B

NOT ON FILE

QUESTION TEXT:

IF SP IS NOT IN THE ROOM, ASK PROXY TO HAVE SP JOIN YOU

IF/WHEN SP IS IN THE ROOM, PRESS 1 AND ENTER TO CONTINUE

CG1C

cg5quesremem

R5 CG1C START W QUES ABOUT MEMRY

QUESTION TEXT:

I will start with a question about memory. Does that sound OK?

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

CG6PRE

CG1D

cg5reascano1

R5 CG1D SP CANT ANS DEMENTIA

cg5reascano2

R5 CG1D SP CANT ANS UNABLE SPEAK

cg5reascano3

R5 CG1D SP CANT ANS UNABLE HEAR

cg5reascano4

R5 CG1D SP CANT ANS SP REFUSED

cg5reascano5	R5 CG1D CANT ANS PROXY REFUSED
cg5reascano6	R5 CG1D SP CANT ANS NOT PRESENT
cg5reascano7	R5 CG1D SP CANT ANS SP TOO ILL
cg5reascano8	R5 CG1D SP CANT ANS LANG BARRIER
cg5reascano9	R5 CG1D SP CANT ANS OTHR SPECIFY

QUESTION TEXT:

What is the main reason you feel (you/he/she) cannot answer questions about memory?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	SP HAS DEMENTIA/ALZHEIMER'S/ NOT ABLE	GO TO MO
2	SP IS UNABLE TO SPEAK	GO TO MO
3	SP IS UNABLE TO HEAR	GO TO MO
4	SP REFUSED	GO TO MO
5	PROXY REFUSED	GO TO MO
6	SP NOT PRESENT	GO TO MO
7	SP TOO ILL	GO TO MO
8	SP LANGUAGE BARRIER	GO TO MO
91	OTHER (SPECIFY)	

CG1E	CG1E	NOT ON FILE
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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
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QUESTION TEXT:

The next few questions are about people's memory and ability to think about things. It is important for the study to better understand memory in people as they age.

PRESS 1 AND ENTER TO CONTINUE

CG2	cg5ratememry	R5 CG2 RATE YOUR MEMORY
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DISPLAY INSTRUCTIONS:

Display "at the present time" in bold underlined text.

QUESTION TEXT:

First, how would you rate your memory at the present time? Would you say it is excellent, very good, good, fair, or poor?

CODES

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

BOX CG3

BOX CG3

NOT ON FILE

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

CG3

cg5ofmemprob

R5 CG3 OFTN MEMRY PROBS INTERFER

QUESTION TEXT:

SHOW CARD CG1

In the last month, how often did memory problems interfere with your daily activities? Would you say every day, most days, some days, rarely, or never?

CODES

- 1 EVERY DAY (7 DAYS A WEEK)
 - 2 MOST DAYS (5-6 DAYS A WEEK)
 - 3 SOMEDAYS (2-4 DAYS A WEEK)
 - 4 RARELY (ONCE A WEEK OR LESS)
 - 5 NEVER
- REFUSED
DON'T KNOW

CG4

cg5memcom1yr

R5 CG4 MEMRY COMPARD TO 1 YR AGO

DISPLAY INSTRUCTIONS:

Display "1 year ago" in bold underlined text.

QUESTION TEXT:

SHOW CARD CG2

Compared to 1 year ago, would you say your memory is much better now, better now, about the same, worse now, or much worse now than it was then?

CODES

- 1 MUCH BETTER
 - 2 BETTER
 - 3 SAME
 - 4 WORSE
 - 5 MUCH WORSE
- REFUSED
DON'T KNOW
-

QUESTION TEXT:

We're interested in how memory actually works. We find that even people with very good memories seem to forget some things from time to time. The next questions are a little different, but are often asked on studies about memory.

PRESS 1 AND ENTER TO CONTINUE

CG6A**cg5todaydat1**

R5CG6Aa TODAY'S DATE CORRECT MNTH

cg5todaydat2

R5 CG6Ab TODAY'S DATE CORRECT DAY

cg5todaydat3

R5 CG6Ac TODAY'S DATE CORRECT YR

cg5todaydat5

R5 CG6Ad USED AID FOR MTH DAY YEAR

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at CG6a, do not display question text in brackets. Otherwise, display question text in brackets.
 Spell out month in question text and also as a numeric date as indicated in interviewer question text.
 If at CG6a, display "IF SP DID NOT ALREADY MENTION THE MONTH, PROBE: What is the month?"
 If at CG6b, display "IF SP DID NOT ALREADY MENTION THE DAY, PROBE: What is the day?"
 If at CG6c, display "IF SP DID NOT ALREADY MENTION THE YEAR, PROBE: What is the year?"

Display "month", "day" and "year" in each of the probes in bold underlined text.

For display of "TODAY'S DATE IS:" display TODAY'S date.

Display "MONTH", "DAY", and "YEAR" in bold underlined text.

QUESTION TEXT:

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

TODAY'S DATE IS: {MONTH DAY, YEAR} {(mm/dd/yyyy)}
 {IF SP DID NOT ALREADY MENTION THE MONTH, PROBE: What is the month?}
 {IF SP DID NOT ALREADY MENTION THE DAY, PROBE: What is the day?}
 {IF SP DID NOT ALREADY MENTION THE YEAR, PROBE: What is the year?}

CODE NO (2) FOR DON'T KNOW RESPONSES

RESPONSE [1] a. DID SP SAY THE CORRECT MONTH?
 RESPONSE [2] b. DID SP SAY THE CORRECT DAY?
 RESPONSE [3] c. DID SP SAY THE CORRECT YEAR?
 RESPONSE [4] d. DID SP LOOK AT A CALENDAR, NEWSPAPER, WATCH, OR OTHER AID FOR THE DATE?

CODES

1 YES
 2 NO/DON'T KNOW
 REFUSED

PROGRAMMER INSTRUCTIONS:

Disallow RF for response [4]d.

CG6B**cg5todaydat4**

R5 CG6Ba TODAY'S DATE CORRECT DOW

cg5todaydat6

R5 CG6Bb USED AID FOR DAY OF WEEK

DISPLAY INSTRUCTIONS:

For display of "TODAY IS:" display day of the week for TODAY's date.

Display "DAY OF THE WEEK" in bold underlined text.

QUESTION TEXT:

Without looking at a calendar or watch, please tell me what day of the week it is.

TODAY IS: {DAY OF THE WEEK}.

CODE NO (2) FOR DON'T KNOW RESPONSES.

RESPONSE [1] a. DID SP SAY THE CORRECT DAY OF THE WEEK?

RESPONSE [2] b. DID SP LOOK AT A CALENDAR, NEWSPAPER, WATCH, OR OTHER AID FOR THE DAY OF THE WEEK?

CODES

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

PROGRAMMER INSTRUCTIONS:

Disallow RF for response [2]d.

BOX CG7**BOX CG7**

NOT ON FILE

If PROXY flag =1 and (CG6Aa-CG6Ad and CG6Ba-CG6Bb =2 (NO/DON'T KNOW) or REFUSED, go to Section MO Mobility.
Otherwise, go to CG7PRE.

CG7PRE**cg5prewrdrcl**

R5 CG7PRE INTRO TO WORD RECALL

QUESTION TEXT:

Now I will read a set of 10 words and ask you to recall as many as you can. We have purposely made the list long so that it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully as I read the set of words because I cannot repeat them. When I finish, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

IF SP ASKS TO WRITE DOWN WORDS, SAY: We want you to try to recall the words without any help.

REPEAT INSTRUCTIONS ABOVE AS NEEDED FOR SP TO UNDERSTAND ACTIVITY BEFORE CONTINUING

CODES

- | | | |
|---|------------------------|-----|
| 1 | CONTINUE WITH ACTIVITY | |
| 2 | SP REFUSES ACTIVITY | CG9 |

CG7**cg5dwrdrclnm**

R5 D WHICH WORD LIST ASSIGNED

DISPLAY INSTRUCTIONS:

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

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

Else if WORD RECALL LIST 2ND ADMIN = 3 (from preload), display words from word list 3.

Display one word from list 1, 2, or 3 one at a time every 2 seconds using Blaise timer application.

Display words in font size 36 in the middle of the screen.

Display interviewer instruction at the top of the screen in regular font size.

{variable text [1-3]}

[LIST 1]

Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]

Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]

Water
Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

QUESTION TEXT:

READ THE WORDS DISPLAYED AT A SLOW, STEADY RATE AS THEY COME UP ON THE SCREEN.
APPROXIMATELY 1 WORD EVERY 2 SECONDS

PRESS 1 AND ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

After the last word, automatically advance screen to CG8.

CG7A

CG7A

NOT ON FILE

QUESTION TEXT:

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

CG8

cg5wrdsrca1

R5 CG8 1 TELL WORDS U CAN RECALL

cg5wrdsrca2

R5 CG8 2 TELL WORDS U CAN RECALL

cg5wrdsrca13	R5 CG8 3 TELL WORDS U CAN RECALL
cg5wrdsrca14	R5 CG8 4 TELL WORDS U CAN RECALL
cg5wrdsrca15	R5 CG8 5 TELL WORDS U CAN RECALL
cg5wrdsrca16	R5 CG8 6 TELL WORDS U CAN RECALL
cg5wrdsrca17	R5 CG8 7 TELL WORDS U CAN RECALL
cg5wrdsrca18	R5 CG8 8 TELL WORDS U CAN RECALL
cg5wrdsrca19	R5 CG8 9 TELL WORDS U CAN RECALL
cg5wrdsrca10	R5 CG8 10 TELL WORDS U CAN RECALL
cg5dwrduunrc	R5 D SCORE IMMEDIATE WORD RECALL
cg5dwrdirnone	R5 D IMMEDIATE RECALL NONE
cg5dwrdirref	R5 D IMMEDIATE RECALL REFUSED

DISPLAY INSTRUCTIONS:

Display word list that was presented in CG7 for this administration.

Display response codes 91 and 92 response categories in a column beside the word list.

QUESTION TEXT:

Now please tell me the words you can recall.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE: Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]

Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]

Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]

Water

Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

91. NO WORDS REMEMBERED
92. REFUSED

PROGRAMMER INSTRUCTIONS:

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message
“INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving
the screen.

If 91 or 92 selected, go to CG9.

CG8A

cg5wrdsntlst

R5 CG8A WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

CODES

1 YES
2 NO

CG9

CG8B

cg5numnotlst

R5 CG8B NUM WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

ENTER NUMBER
RANGE 1-10

ENTER NUMBER

Range

1 to 10

CG9

cg5probrecal

R5 CG9 SP HAD DIFF HEARING WORDS

cg5probrecal2

R5 CG9 INTERRUPTION AS LIST READ

cg5probrecal3

R5 CG9 PROB WORD RECALL SPECIFY

cg5probrecal4

R5 CG9 WD RECALL NO PROB OCCURRD

cg5probrecal5

R5 CG9 SP REFUSED WORD RECALL

QUESTION TEXT:

DID SP HAVE ANY PROBLEMS DURING THE WORD RECALL TASK?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	DIFFICULTY HEARING ANY OF THE WORDS	CG10
2	INTERRUPTION OCCURRED WHILE LIST WAS BEING READ	CG10
91	OTHER PROBLEM (SPECIFY)	
92	NO PROBLEMS OCCURRED	CG10
97	SP REFUSED WORD RECALL TASK	CG10

PROGRAMMER INSTRUCTIONS:

Disallow RF for response [2]d.

CG9A**CG9A**

NOT ON FILE

QUESTION TEXT:

SPECIFY THE TYPE OF PROBLEM EXPERIENCED DURING WORD RECALL TASK

ENTER TEXT

Length

255

CG10**cg5dclkdraw**

R5 D SCORE OF CLOCK DRAWING TEST

cg5dclkingcl

R5 D IMAGE CLARITY CLOCK DRAWING

DISPLAY INSTRUCTIONS:

Display “blank” in bold underlined text.

Display “REPEAT INSTRUCTIONS IF NEEDED” in bold underlined text.

QUESTION TEXT:

SET STOPWATCH FOR 2 MINUTES IN COUNTDOWN MODE

HAND SP A BLANK SHEET OF PAPER AND AN ERASABLE PEN

IF NEEDED, MAKE SURE SP HAS A WRITING SURFACE. THEN SAY:

Please draw a clock on this piece of paper.

Start by drawing a large circle.

Put all the numbers in the circle and set the hands to show 11:10 (10 past 11).

START STOPWATCH

REPEAT INSTRUCTIONS IF NEEDED.

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

PRESS 1 AND ENTER TO CONTINUE

CG10A**cg5atdrwclck**

R5 CG10A ATTEMPT CLOCK DRAWIG

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

- | | |
|---------------------|------------------------------------|
| cg5presidna1 | R5 CG13A PRES LAST NAME CORRECT |
| cg5presidna2 | R5 CG13B PRES LAST NAME INCORRECT |
| cg5presidna3 | R5 CG13C PRES FIRST NAME CORRECT |
| cg5presidna4 | R5 CG13D PRES FIRST NAME INCORRECT |

DISPLAY INSTRUCTIONS:

Display "FIRST" "LAST", "first" and "last" in underlined text.

QUESTION TEXT:

Next, who is the President of the United States right now?

CORRECT ANSWER IS BARACK OBAMA

IF ONLY FIRST NAME GIVEN, ASK: Do you know his last name?

IF ONLY LAST NAME GIVEN, ASK: Do you know his first name?

SELECT ALL THAT APPLY

CODES

- | | |
|---|--------------------------------------|
| 1 | LAST NAME CORRECT |
| 2 | LAST NAME NOT CORRECT/DK LAST NAME |
| 3 | FIRST NAME CORRECT |
| 4 | FIRST NAME NOT CORRECT/DK FIRST NAME |
| | REFUSED |

PROGRAMMER INSTRUCTIONS:

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message "INCOMPLETE ANSWER. A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED.

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

CG14

- | | |
|-------------------|---------------------------------------|
| cg5vpname1 | R5 CG14A VP PRES LAST NAME CORRECT |
| cg5vpname2 | R5 CG14B VP PRES LAST NAME INCORRECT |
| cg5vpname3 | R5 CG14C VP PRES FIRST NAME CORRECT |
| cg5vpname4 | R5 CG14D VP PRES 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

- | | |
|---|--------------------------------------|
| 1 | LAST NAME CORRECT |
| 2 | LAST NAME NOT CORRECT/DK LAST NAME |
| 3 | FIRST NAME CORRECT |
| 4 | FIRST NAME NOT CORRECT/DK FIRST NAME |
| | REFUSED |

PROGRAMMER INSTRUCTIONS:

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message
"INCOMPLETE ANSWER. A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED."

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH
CORRECT AND NOT CORRECT OR UNKNOWN".

If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE
BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

BOX CG15**BOX CG15****NOT ON FILE**

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

CG15

cg5wrdsdcal1	R5 CG15 1 DELAYED WORD RECALL
cg5wrdsdcal2	R5 CG15 2 DELAYED WORD RECALL
cg5wrdsdcal3	R5 CG15 3 DELAYED WORD RECALL
cg5wrdsdcal4	R5 CG15 4 DELAYED WORD RECALL
cg5wrdsdcal5	R5 CG15 5 DELAYED WORD RECALL
cg5wrdsdcal6	R5 CG15 6 DELAYED WORD RECALL
cg5wrdsdcal7	R5 CG15 7 DELAYED WORD RECALL
cg5wrdsdcal8	R5 CG15 8 DELAYED WORD RECALL
cg5wrdsdcal9	R5 CG15 9 DELAYED WORD RECALL
cg5wrdsdcal10	R5 CG15 10 DELAYED WORD RECALL
cg5dwrddlyrc	R5 D SCORE DELAYED WORD RECALL
cg5dwrddnone	R5 D DELAYED RECALL NONE
cg5dwrddrref	R5 D DELAYED RECALL REFUSED

DISPLAY INSTRUCTIONS:

Display word list that was presented in CG7.

Display response codes 91 and 92 response categories in a column beside the word list.

QUESTION TEXT:

A little while ago, I read you a list of 10 words and you repeated the ones you could remember. Please tell me any of the words that you remember now.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE: Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]

Hotel
River
Tree
Skin
Gold
Market
Paper
Child
King
Book

[LIST 2]

Woman
Rock
Blood
Corner
Shoes
Letter
Girl
House
Valley
Engine

[LIST 3]

Water
Church
Doctor
Palace
Fire
Garden
Sea
Village
Baby
Table

91. NO WORDS REMEMBERED

92. REFUSED

PROGRAMMER INSTRUCTIONS:

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message "INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

CG15A

CG15A

NOT ON FILE

QUESTION TEXT:

AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

If CG15 = 91 or 92, go to Section MO – Mobility.

CG16**cg5wrdsnotlst**

R5 CG16 WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

CODES

1 YES

2 NO

SECTION MO

CG17**cg5numwrddnot**

R5 CG17 NUM OF WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

ENTER NUMBER

RANGE 1-10

ENTER NUMBER

Range

1 to 10

Derived Variables from Items in CG Section

cg5dwrdircl	R5 D WORD1 IMMEDIATE RECALL
cg5dwrdr2cl	R5 D WORD2 IMMEDIATE RECALL
cg5dwrdr3cl	R5 D WORD3 IMMEDIATE RECALL
cg5dwrdr4cl	R5 D WORD4 IMMEDIATE RECALL
cg5dwrdr5cl	R5 D WORD5 IMMEDIATE RECALL
cg5dwrdr6cl	R5 D WORD6 IMMEDIATE RECALL
cg5dwrdr7cl	R5 D WORD7 IMMEDIATE RECALL
cg5dwrdr8cl	R5 D WORD8 IMMEDIATE RECALL
cg5dwrdr9cl	R5 D WORD9 IMMEDIATE RECALL
cg5dwrdr10cl	R5 D WORD10 IMMEDIATE RECALL
cg5dwrdrnrc	R5 D WORD DELAYED RECALL [See CG8]
cg5dwrdrnone	R5 D IMMEDIATE RECALL NONE [See CG8]

cg5dwrdirref	R5 D IMMEDIATE RECALL REFUSED [See CG8]
cg5dwr1dly	R5 D WORD1 DELAYED RECALL
cg5dwr2dly	R5 D WORD2 DELAYED RECALL
cg5dwr3dly	R5 D WORD3 DELAYED RECALL
cg5dwr4dly	R5 D WORD4 DELAYED RECALL
cg5dwr5dly	R5 D WORD5 DELAYED RECALL
cg5dwr6dly	R5 D WORD6 DELAYED RECALL
cg5dwr7dly	R5 D WORD7 DELAYED RECALL
cg5dwr8dly	R5 D WORD8 DELAYED RECALL
cg5dwr9dly	R5 D WORD9 DELAYED RECALL
cg5dwr10dly	R5 D WORD10 DELAYED RECALL
cg5dwrddlyrc	R5 D SCORE DELAYED WORD RECALL [See CG15]
cg5dwrddnone	R5 D DELAYED RECALL NONE [See CG15]
cg5dwrddrref	R5 D DELAYED RECALL REFUSED [See CG15]

NHATS Round 5

Section MO [MOBILITY]

Sequence: 18

MO1PRE

MO1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "going outside".
Otherwise, display "leaving {your/SP's} {home/building} to go outside".
If STRUCTURE flag = 2 (MULTI-UNIT), display "building".
Otherwise, display "home".

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

MO1

mo5outoft

R5 MO1 OFTEN GO OUTSIDE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".
Otherwise, display "leave {your/his/her} {home/building} to".

QUESTION TEXT:

SHOW CARD MO1

In the last month {of {his/her} life}, how often did {you/SP} {leave {your/his/her} {home/building} to} go outside? Would you say every day, most days, some days, rarely, or never?

CODES

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

PROGRAMMERS INSTRUCTIONS:

If MO1 = 5 (NEVER) SET DIDNTLEAVE FLAG TO 1 (YES)

BOX MO2

BOX MO2

NOT ON FILE

If DECEASED flag = 1 (YES) and MO1 = 5 (NEVER), go to MO12.
Else if DECEASED flag = 1 (YES), go to MO6.
Else if MO1 = 5 (NEVER), go to MO10.

Else if CANE FLAG=1 (YES), go to MO2.
Otherwise, go to BOX MO3.

MO2

mo5outcane

R5 MO2 CANE USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} cane? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
- 2 MOST TIMES
- 3 SOMETIMES
- 4 RARELY
- 5 NEVER
- REFUSED
- DON'T KNOW

BOX MO3

BOX MO3

NOT ON FILE

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

MO3

mo5outwalkr

R5 MO3 WALKER USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} walker? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
- 2 MOST TIMES
- 3 SOMETIMES
- 4 RARELY
- 5 NEVER
- REFUSED
- DON'T KNOW

BOX MO4

BOX MO4

NOT ON FILE

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

MO4

mo5outwlchr

R5 MO4 WHEELCHAIR USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} wheelchair? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
- 2 MOST TIMES
- 3 SOMETIMES

- 4 RARELY
- 5 NEVER
REFUSED
DON'T KNOW

BOX MO5
BOX MO5

NOT ON FILE

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

MO5
mo5outsctr

R5 MO5 SCOOTER USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} scooter? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
- 2 MOST TIMES
- 3 SOMETIMES
- 4 RARELY
- 5 NEVER
REFUSED
DON'T KNOW

MO6
mo5outhlp

R5 MO6 HELP GO OUTSIDE

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she} {lives/lived}},".
If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives" and "leave {your/his/her} {home/building} to".

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} {leave {your/his/her} {home/building} to} go outside?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}}, or someone paid to help {you/him/her}.

CODES

- 1 YES
- 2 NO
REFUSED
DON'T KNOW

BOX MO6A
BOX MO6A

NOT ON FILE

If DECEASED flag = 1 (YES) and MO6 = 2 (NO), RF, or DK, go to BOX MO12.
Else if MO6 = 2 (NO), RF, or DK, go to MO8.

Otherwise, go to MO6A.

MO6A

op5outhlp

R5 MO6A HELPS SP GO OUTSIDE

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODE LIST.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If DECEASED flag = 1 (YES), display "lived".

Otherwise, display "lives" and "(leave {your/his/her} {home/building} to)".

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

If FACILITY flag=1 (YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the roster.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who helped {you/SP} do that ({leave {your/his/her} {home/building} to} go outside)?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MO6b. [What is (his/her) first name?] CONFIRM SPELLING

MO6c. [What is (his/her) last name?] CONFIRM SPELLING

MO6d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|-----------------|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |

22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

If DECEASED flag = 1 (YES), go to BOX MO12.

MO7	mo5outslf	R5 MO7 LEFT BY YOURSELF
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DISPLAY INSTRUCTIONS:

DISPLAY "{by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} do this by {yourself/himself/herself}? Would you say every time, most times, sometimes, rarely, or never?

CODES

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

MO8	mo5outdif	R5 MO8 HOW DIFFICULT
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DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO2 = 1,2,3, or 4 (uses cane when leaving building or MO3 = 1,2,3, or 4 (uses walker when leaving building) or MO4 = 1,2,3, or 4 (uses wheelchair when leaving building) or MO5 = 1,2,3, or 4 (uses scooter when leaving building), display "when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}".

If MO2 = 1,2,3, or 4 (uses cane when leaving building), display "cane".

If MO3 = 1,2,3, or 4 (uses walker when leaving building), display "walker".

If MO4 = 1,2,3, or 4 (uses wheelchair when leaving building), display “wheelchair”.
 If MO5 = 1,2,3, or 4 (uses scooter when leaving building), display “scooter”.
 If more than one (MO2, MO3, MO4, MO5) = 1,2,3, or 4 (used inside), insert “or” between the names of the devices.

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her}{cane / walker / wheelchair / scooter}}, how much difficulty did {you/{he/she}} have leaving {your/his/her}{home/building} to go outside by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

- | | |
|---|------------|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

MO9

mo5outyrgo

R5 MO9 HOW OFTEN LEAVE

DISPLAY INSTRUCTIONS:

DISPLAY “a year ago” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now leave {your/his/her}{home/building} more often, less often or about the same?

CODES

- | | |
|---|----------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | ABOUT THE SAME |
| | REFUSED |
| | DON'T KNOW |

BOX MO10

BOX MO10

NOT ON FILE

If MO6 = 2 (no help to go outside) and MO8 = 1 (no difficulty going outside by self), go to MO11PRE.
 Otherwise, go to MO10.

MO10

mo5outwout

R5 MO10 STAYED IN NO HELP

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself} IN BOLD UNDERLINED TEXT

If MO1 = 5 (never left building) or MO7 = 4 (never left building by self), display “no one was there to help {you/him/her} go out”.

Otherwise display "{you/he/she} had difficulty going out by {yourself/himself/herself}"..

QUESTION TEXT:

In the last month, did {you/SP} ever have to stay in {your/his/her}{home/building} because {no one was there to help {you/him/her} go out/ {you/he/she} had difficulty going out by {yourself/himself/herself}}?

CODES

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

REFUSED
DON'T KNOW

MO11PRE

MO11PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

These next few questions are about getting around inside {your/SP's} home {or building}.

PRESS 1 AND ENTER TO CONTINUE

BOX MO11

BOX MO11

NOT ON FILE

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

MO11

mo5oftgoarea

R5 MO11 HOW OFTEN GO OTHER AREAS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display “{apartment/room/unit/suite/other}”.
Otherwise, display “home”.

QUESTION TEXT:

SHOW CARD MO1

In the last month, how often did {you /SP} leave {your/his/her} {home/{apartment/room/unit/suite/other}} to go into other areas of the building? Would you say every day, most days, some days, rarely, or never?

CODES

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

PROGRAMMERS INSTRUCTIONS:

If MO1 = 5 (NEVER) SET DIDNTLEAVE FLAG TO 1 (YES)

BOX MO12

BOX MO12

NOT ON FILE

If DECEASED flag = 1 (YES) and MO1 = 5 (NEVER LEFT HOME), go to MO12.
Else if DECEASED flag = 1 (YES), go to MO18.

Else if STRUCTURE flag = 2 (multi-unit) and MO1 = 5 (never leave building) and MO11 = 5 (never go to other parts of building), go to MO12.

Else if [STRUCTURE flag = 1 (single home) or STRUCTURE flag = 3 (Other)] and MO1 = 5 (never leave home), go to MO12.

Otherwise, go to BOX MO13.

MO12**mo5oflvlslepr**

R5 MO12 HOW OFTN LEAVE BEDROOM

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “of {his/her} life” and “slept”.
Otherwise, display “sleeps”.

QUESTION TEXT:

SHOW CARD MO1

In the last month {of {his/her} life}, how often did {you/SP} leave the room where {you sleep/{he/she} {sleeps/slept}}? Would you say every day, most days, some days, rarely, or never?

CODES

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

PROGRAMMER INSTRUCTIONS:

If MO12 =5 (never leaves room), set each roster selection/addition at HA25, set HELPEDWITHMEALS flag = 1 (yes).

BOX MO13**BOX MO13**

NOT ON FILE

If DECEASED flag = 1 (YES), and Mo12 = 5 (NEVER), go to MO25.
Else if DECEASED = 1 (YES), go to MO18.
Else if MO12 = 5 (NEVER), go to MO23.
Else if CANE flag = 1 (YES), go to MO13.
Otherwise, go to BOX MO14.

MO13**mo5insdcane**

R5 MO13 OFTEN USED CANE INSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/SP} use {your/his/her} cane? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
- 2 MOST TIMES
- 3 SOMETIMES
- 4 RARELY
- 5 NEVER
- REFUSED
- DON'T KNOW

BOX MO14**BOX MO14**

NOT ON FILE

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

MO14**mo5insdwalkr**

R5 MO14 OFTEN USED WALKER INSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/he/she} use {your /his/her} walker? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX MO15**BOX MO15**

NOT ON FILE

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

MO15**mo5insdwlchr**

R5 MO15 OFT USD WHEELCHAR INSIDE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} wheelchair? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX MO16**BOX MO16**

NOT ON FILE

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

MO16**mo5insdsctr**

R5 MO16 OFTEN USD SCOOTER INSIDE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} scooter? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

MO17**mo5oftholdwl**

R5 MO17 OFTEN HOLD WALLS INSIDE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} 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**mo5insdhlp**

R5 MO18 GOT HELP INSIDE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives" and "{your/his/her} home {or building}".

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

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

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} get around inside {{your/his/her} home {or building}}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}},} or someone paid to help {you/{him/her}}.

CODES

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

2 NO
REFUSED
DON'T KNOW

BOX MO19A

BOX MO19A

NOT ON FILE

If DECEASED flag = 1 (YES) and MO18 = 2 (NO), RF, or DK, go to MO25.
Else if MO18 = 2 (NO), RF, or DK, go to MO21.
Otherwise, go to MO19A.

MO19A

op5insdhlp

R5 MO19A HELPS SP INSIDE HOUSE

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODE LIST.

If DECEASED flag = 1 (YES), display "lived".
Otherwise, display "lives" and "{your/SP's} home {or building}".

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

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

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag=1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the person roster.

Display "first" and "last" in underlined text

QUESTION TEXT:

Who helped with that (getting around inside {{your/SP's} home {or building}})?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}}}, or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MO19b. [What is (his/her) first name?] CONFIRM SPELLING

MO19c. [What is (his/her) last name?] CONFIRM SPELLING

MO19d. [What is {his/her} relationship to {you/SP?}] PRESS F1 FOR HELP SCREEN

CODES

2 SPOUSE/PARTNER
3 DAUGHTER
4 SON
5 DAUGHTER-IN-LAW
6 SON-IN-LAW
7 STEPDAUGHTER
8 STEPSON
9 SISTER
10 BROTHER

11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX MO20	BOX MO20	NOT ON FILE
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If DECEASED FLAG=1 (YES), go to MO25.
Otherwise, go to MO20.

MO20	mo5insdslf	R5 MO20 HOW OFTEN BY YOURSELF
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DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If STRUCTURE flag = 2 (multi-unit), display "or building,".
Otherwise, display only the comma after "home"

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} went around inside {your/his/her} home {,/or building,} how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

CODES

1	EVERY TIME	
2	MOST TIMES	
3	SOMETIMES	
4	RARELY	
	NEVER	MO22
	REFUSED	
	DON'T KNOW	

MO21**mo5insddif****R5 MO21 HOW DIFF GET ARD W DEVICE****DISPLAY INSTRUCTIONS:**

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO13 = 1,2,3, or 4 (used cane inside) or MO14 = 1,2,3, or 4 (used walker inside) or MO15 = 1,2,3, or 4 (used wheelchair inside) or MO16 = 1,2,3, or 4 (used scooter inside), display "when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}".

If MO13 = 1,2,3, or 4 (used cane inside), display "cane".

If MO14 = 1,2,3, or 4 (used walker inside), display "walker".

If MO15 = 1,2,3, or 4 (used wheelchair inside), display "wheelchair".

If MO16 = 1,2,3, or 4 (used scooter inside), display "scooter".

If more than one (MO13, MO14, MO15, MO16) = 1,2,3, or 4 (used inside), insert "or" between the names of the devices.

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

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}}, how much difficulty did {you/SP} have getting around inside {your/his/her} home {or building} by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

1	NONE
2	A LITTLE
3	SOME
4	A LOT
	REFUSED
	DON'T KNOW

MO22**mo5insdyrgo****R5 MO22 HOW OFTEN COMPRED YR AGO****DISPLAY INSTRUCTIONS:**

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

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now leave {your/his/her} home {or building} more often, less often or about the same?

CODES

1	MORE OFTEN
2	LESS OFTEN
3	ABOUT THE SAME
	REFUSED

DON'T KNOW

BOX MO23

BOX MO23

NOT ON FILE

If MO18 = 2 (did not get help getting around inside) and MO21 = 1 (no difficulty getting around inside), go to MO24PRE.
Otherwise, go to MO23.

MO23

mo5insdwout

R5 MO23 PLACES INSIDE DID NOT GO

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

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

If MO20 = 4 (never went around inside by self) or MO12 = 5 (never left room where slept), display "no one was there to help {you/him/her}".

Otherwise display "it was too difficult to go there by {yourself/himself/herself}".

QUESTION TEXT:

In the last month, were there any places in {your/SP's} home {or building} that {you/he/she} did not go because {no one was there to help {you/him/her}/it was too difficult to go there by {yourself/himself/herself}}?

CODES

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

MO24PRE

MO24PRE

NOT ON FILE

QUESTION TEXT:

These next few questions are about getting in and out of bed.

PRESS 1 AND ENTER TO CONTINUE

BOX MO24

BOX MO24

NOT ON FILE

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

MO24

mo5beddev

R5 MO24 OUT OF BED USED DEVICE

DISPLAY INSTRUCTIONS:

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

If CANE flag is null and WALKER flag = 1 (yes), display "walker".

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} got out of bed, how often did {you/he/she} use {your/his/her} {cane /

walker / cane or walker} to help? Would you say every time, most times, sometimes, rarely, or never?

CODES

1	EVERY TIME
2	MOST TIMES
3	SOMETIMES
4	RARELY
5	NEVER
	REFUSED
	DON'T KNOW

MO25

mo5bedhlp

R5 MO25 GOT HELP OUT OF BED

DISPLAY INSTRUCTIONS:

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

If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
Otherwise, display "lives".

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} get out of bed?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she}{lives/lived}},} or someone paid to help {you/him/her

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX MO25A

BOX MO25A

NOT ON FILE

If DECEASED flag = 1 (YES) and MO25 = 2 (NO), RF, or DK, go to Section DM - Duration of Mobility Accommodations.

Else if MO25 = 2 (NO), RF, or DK, go to MO27.
Otherwise, go to MO25A.

MO25A

op5bedhlp

R5 MO25A HELPS SP OUT OF BED

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag=1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text

QUESTION TEXT:

Who helped {you/SP} do that (get out of bed)?
PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

MO25b. [What is (his/her) first name?] CONFIRM SPELLING

MO25c. [What is (his/her) last name?] CONFIRM SPELLING

MO25d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX MO26**BOX MO26**

NOT ON FILE

If DECEASED flag = 1 (YES), go to Section DM - Duration of Mobility Accommodations.

Otherwise, go to MO26.

MO26**mo5bedslf**

R5 MO26 OFT GOT OUT BED BY SLF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} got out of bed, how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

CODES

- | | | |
|---|------------|------|
| 1 | MOST TIMES | |
| 2 | SOMETIMES | |
| 3 | RARELY | |
| 4 | NEVER | MO28 |
| 5 | REFUSED | |
| | DON'T KNOW | |

MO27**mo5beddif**

R5 MO27 DIFF GET OUT BED BY SELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO24 = 1,2,3, or 4 (used cane or walker to get out of bed), display "when {you/SP} used {your/his/her} {cane/walker/cane or walker}".

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

If CANE flag is null and WALKER flag = 1 (yes), display "walker".

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her} {cane/walker/cane or walker}} how much difficulty did {you/he/she} have getting out of bed by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

- | | |
|---|------------|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

BOX MO28**BOX MO28**

NOT ON FILE

If MO25 = 2 (no help getting out of bed) and MO27 = 1 (no difficulty getting out of bed), go to

Section DM, Duration of Mobility Accommodations.

Otherwise, go to MO28

MO28

mo5bedwout

R5 MO28 OFTEN HAD TO STAY IN BED

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO26 = 4 (never got out of bed by self), display "no one was there to help {you/him/her}".

Otherwise display "it was too difficult to get out of bed by {yourself/himself/herself}".

QUESTION TEXT:

In the last month, did {you/SP} ever have to stay in bed because {no one was there to help {you/him/her}/it was too difficult to get out of bed by {yourself/himself/herself}}?

CODES

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

Derived Variables from Items in MO Section

mo5doutsfdf	R5 D EFFORT TO GO OUTSIDE SELF
mo5doutdevi	R5 D GO OUTSIDE USING DEVICES
mo5douthelp	R5 D GO OUTSIDE USING HELP
mo5dinsdsfdf	R5 D MOVE INSIDE SELF
mo5dinsddevi	R5 D MOVE INSIDE WITH DEVICES
mo5dinsdhelp	R5 D MOVE INSIDE WITH HELP
mo5dbedsfdf	R5 D GET OUT OF BED
mo5dbeddevi	R5 D DEVICE USE 2 GET OUT OF BED
mo5dbedhelp	R5 D HELP TO GET OUT OF BED

Flag Variables Set in MO Section

fl5didntleav	R5 F MO SP DID NOT LEAVE HOME
fl5ntlvrmslp	R5 F MO SP DID NOT LEAVE BEDROOM

NHATS Round 5

Section DM [DURATION OF MOBILITY ACCOMMODATIONS]

Sequence: 19

BOX DM1

BOX DM1

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and [MO6, MO18, and MO25 <> 1 (YES)], go to DM1.
Else if NEWSAMPLE flag = 1 (YES), go to DM2.

If DECEASED flag = 1 (YES) and (LAST INT Status = 64 or 61), go to Section SC – Self-Care Activities.
Else if (LAST INT Status=64), go to Section DT – Driving & Transportation.

Else if DECEASED flag=1 (YES) and [Combined MONTH OF DEATH and YEAR OF DEATH= Combined LAST INT interview month and LAST INT interview year or the month after the LAST INT interview month and LAST INT interview year(LAST INT interview month+1) or Month of Death=DK or RF], go to Section SC – Self-Care Activities.

Else if [LAST INT MO6, MO18, and MO25 <>1 (YES)] and [CURRENT INT MO6, MO18, or MO25 = 1 (YES)], go to DM3C.
Else if [LAST INT MO6, MO18, or MO25 = 1 (YES)] and [CURRENT INT MO6, MO18, and MO25 <>1 (YES)], go to DM3D.
Else if [LAST INT MO6, MO18, OR MO25 = 1 (YES)] and [CURRENT INT MO6, MO18, OR MO25 = 1 (YES)], go to DM3E.

Otherwise, go to DM1.

DM1

dm5helpmobil

R5 DM1 GET HELP WITH MOBILITY

DISPLAY INSTRUCTIONS:

If NEWSAMPLE flag = 1 (YES), display "In the last year".

If DECEASED flag = 1 (YES), display "Between" and "{LAST INT MONTH AND YEAR}" and "and {MONTH AND YEAR OF DEATH}" and "inside, or going outside".

Otherwise if NEWSAMPLE flag <> 1 (YES), display "Since" and "{LAST INT MONTH AND YEAR}" and "{your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}".

If DECEASED flag <>1 (YES) and STRUCTURE flag = 2 (MULTI-UNIT), display "or building", and "leaving {your/his/her} building".

Otherwise, if DECEASED flag <>1 (YES) and STRUCTURE flag <> 2 (MULTI-UNIT), display "leaving {your/his/her} home".

Display "year" in bold underlined text.

QUESTION TEXT:

{In the last year/{Between/Since} {LAST INT MONTH AND YEAR} {and {MONTH AND YEAR OF DEATH}}, did {you/SP} ever get help with getting out of bed, getting around {inside, or going outside} {your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}}?

CODES

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

BOX DM2**BOXDM2**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to DM3B.
Otherwise, go to DM3C.

DM2**dm5helpyrmor**

R5 DM2 GETTING HELP YR OR MORE

DISPLAY INSTRUCTIONS:

If MO25=1 (YES), display “getting out of bed”.

If MO18=1 (YES), display “getting around {your/his/her} {home/{apartment/room/unit/suite/other} {or building}”.

If MO6=1 (YES), display “leaving {your/his/her} home/leaving {your/his/her} building”.

If more than one activity displayed, display “or” between each one.

If STRUCTURE flag = 2 (multi-unit), display “or building”, and “leaving {your/his/her} building”.

Otherwise, display “leaving {your/his/her} home”.

QUESTION TEXT:

{Have you/Has SP} been getting help with {getting out of bed} {getting around {your/his/her} home {or building}} {leaving {your/his/her} home/leaving {your/his/her} building} for a year or more?

IF NEEDED: {Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	
2	NO, LESS THAN A YEAR	DM3B
	REFUSED	BOX DM4
	DON'T KNOW	BOX DM4

DM3A**dm5yrsgethlp**

R5 DM3A HOW MANY YRS GETTING 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**dm5mthgethlp**

R5 DM3B MNTH FIRST LAST GET HLP

DISPLAY INSTRUCTIONS:

If DM1 = 1 (help in last year), display “last” and “any of these activities”.

If DM2 = 2 (help for less than a year) and only one activity displayed at DM2, display “first” and “that”.

If DM2 = 2 (help for less than a year) and more than one activity displayed at DM2, display “first” and “any of these activities”.

Display “MONTH” in underlined text.

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER MONTH

ENTER NUMBER

RANGE

1 to 12

REFUSED

BOX DM4

DON'T KNOW

BOX DM4

DM3B1**dm5yrgethlp**

R5 DM3B YEAR FIRST LAST GET HLP

DISPLAY INSTRUCTIONS:

If DM1 = 1 (HELP IN LAST YEAR), display “last” and “any of these activities”.

If DM2 = 2 (HELP FOR LESS THAN A YEAR) and only one activity displayed at DM2, display “first” and “that”.

If DM2 = 2 (HELP FOR LESS THAN A YEAR) and more than one activity displayed at DM2, display “first” and “any of these activities”.

Display “4-DIGIT YEAR” in underlined text.

QUESTION TEXT:

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

RANGE: CURRENT YEAR-1 to CURRENT YEAR

Go to BOX DM4.

DM3C**dm5helpstmo**

R5 DM3C MONTH MOBIL HELP STARTED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM1 = 1 (YES), do not display the first sentence and display "any of these activities".

Otherwise, display question intro according to the following instructions:

If CURRENT INT MO25 = 1 (YES), display "getting out of bed".

If CURRENT INT MO18 = 1 (YES) and DECEASED flag = 1 (YES), display "getting around inside".

Otherwise if CURRENT INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".

If CURRENT INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside".

Otherwise if CURRENT INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "and" between each one, and "any of these activities".

Otherwise, if only one activity displayed, display "that".

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

Display "first" in bold underlined text

QUESTION TEXT:

{In the last month {of {his/her} life} {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}}/ {{leaving {your/his/her} home/leaving {your/his/her} building }} {{getting around inside} {going outside}}, and at the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} not getting this help.}

In what month since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

ENTER NUMBER

RANGE	1 to 12
REFUSED	BOX DM3D
DON'T KNOW	BOX DM3D

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DM3C=90, go to BOX DM4

DM3C1

dm5helpstyr

R5 DM3C1 YEAR MOBIL HELP STARTED

DISPLAY INSTRUCTIONS:

Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

[In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?:]

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

Combined month and year cannot be before date of last interview. If date is before date of last interview,

display error message #15.

BOX DM3D**BOX DM3D**NOT ON FILE

If [LAST INT MO6, MO18, and MO25 = 2 (NO), RF, or DK] and [CURRENT INT MO6, MO18, or MO25 = 1 (YES)], go to BOX DM4.

Otherwise, go to DM3D.

DM3D**dm5helpendmo**

R5 DM3D MONTH MOBIL HELP ENDED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM1 = 1 (YES), do not display the first sentence and display "any of these activities".

Otherwise display question intro according to the following instructions:

If LAST INT MO25 = 1 (YES), display "getting out of bed".

If LAST INT MO18 = 1 (YES) and DECEASED flag = 1 (YES), display "getting around inside". Otherwise if LAST INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".

If LAST INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside". Otherwise if LAST INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

If more than one activity displayed, display "and" between each one and "any of these activities". Otherwise, if only one activity displayed, display "that".

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

Display "last" in the phrase "last get help" in bold underlined text.

QUESTION TEXT:

{At the time of the last interview in {LAST INT MONTH AND YEAR}, {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}} {{leaving {your/his/her} home/leaving {your/his/her} building}} {{getting around inside} {going outside}}, and in the last month {of {his/her} life} {you were/SP was} not getting this help.}

In what month since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

ENTER NUMBER

RANGE

1 to12

REFUSED

BOX DM4

DON'T KNOW

BOX DM4

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DM3D=90, go to BOX DM4

DM3D1**dm5helpendyr**

R5 DM3D1 YEAR MOBIL HELP ENDED

QUESTION TEXT:

[In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of

these activities?}]

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

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

Go to BOX DM4.

DM3E

dm5nohelp

R5 DM3E NO MOBIL HELP MTH PLUS

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life" and "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}".

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

If LAST INT MO25 = 1 (YES), display "getting out of bed".

IF LAST INT MO18 = 1 (YES), and DECEASED flag = 1 (YES), display "getting around inside". Otherwise if LAST INT MO18 = 1 (YES), display "getting around {your/his/her} home {or building}".

If LAST INT MO6 = 1 (YES) and DECEASED flag = 1 (YES), display "going outside". Otherwise if LAST INT MO6 = 1 (YES), display "leaving {your/his/her} home/leaving {your/his/her} building".

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

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

QUESTION TEXT:

In the last month {of his/her} life} {you/SP} got help with {getting out of bed} {{getting around {your/his/her} home {or building}} {leaving {your/his/her} home/leaving {your/his/her} building}}/{{getting around inside} {going outside}}, and at the time of the last interview in {LAST INT MONTH AND YEAR} {you were/{he/she} was} also getting help like this.

{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}/Since {LAST INT MONTH AND YEAR}}, did {you/he/she} go without help like this for a month or more?

CODES

1	YES	
2	NO	BOX DM4
90	LAST INTERVIEW INFORMATION INCORRECT	BOX DM4
	REFUSED	BOX DM4
	DON'T KNOW	BOX DM4

DM3F

dm5nohelpmos

R5 DM3F MONTHS OF NO MOBIL HELP

QUESTION TEXT:

For about how many months altogether did {you/SP} go without help like this?

ENTER NUMBER

Range 1 to 24
REFUSED
DON'T KNOW

If NEWSAMPLE flag = 1 (YES) and [CANE flag = 1 (YES) or WALKER flag = 1 (YES) or WHEELCHAIR flag = 1 (YES) or SCOOTER flag = 1 (YES)], go to DM5.

Else if NEWSAMPLE flag = 1 (YES), go to DM4.

Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to DM6C.

Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag or SCOOTER flag = 1 (YES)], and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)], go to DM6D.

Else if [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to DM6E.

Otherwise, go to DM4.

DM4**dm5lstrcane**

R5 DM4 IN LST YR USE CANE WALKER

DISPLAY INSTRUCTIONS:

If NEWSAMPLE flag = 1 (YES), display "In the last year".

If DECEASED flag = 1 (YES), display "Between" and "{LAST INT MONTH AND YEAR}" and "and {MONTH AND YEAR OF DEATH}".

Otherwise if NEWSAMPLE flag <> 1 (YES), display "Since" and "{LAST INT MONTH AND YEAR}."

QUESTION TEXT:

{In the last year/{Between/Since} {LAST INT MONTH AND YEAR} {and {MONTH and YEAR of DEATH}}, did {you/SP} ever use a cane, walker, wheelchair, or scooter?

CODES

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

BOX DM5**BOXDM5**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to DM6B.
Otherwise, go to DM6C.

DM5**dm5caneformyr**

R5 DM5 USD CANE, ETC. YR OR MORE

DISPLAY INSTRUCTIONS:

If CANE flag=1 (YES), display "cane".
If WALKER flag=1 (YES), display "walker".
If WHEELCHAIR flag=1 (YES), display "wheelchair".
If SCOOTER flag=1 (YES), display "scooter".

If more than one mobility device displayed, display “or” between each one.

QUESTION TEXT:

{Have you/Has SP} used a {cane}{walker}{wheelchair}{scooter} for a year or more?

IF NEEDED: {Were you/Was SP} using a {cane}{walker}{wheelchair}{scooter} before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	
2	NO, LESS THAN A YEAR	DM6B
	REFUSED	BOX DM7
	DON'T KNOW	BOX DM7

DM6A

dm5yrsuscane

R5 DM6A YEARS USING A CANE, ETC

DISPLAY INSTRUCTIONS:

If only one mobility device displayed at DM5, display “that”.

If more than one mobility device displayed at DM5, display “any of these”.

QUESTION TEXT:

About how many years {have you/has SP} been using {that/any of these}?

ENTER NUMBER OF YEARS

ENTER 997 IF USING MOBILITY DEVICE SINCE BIRTH/ENTIRE LIFE

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 50
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.

Soft range: 1-50.

Go to BOX DM7

DM6B

dm5mtfrtcane

R5 DM6B MTH FST/LST USE CANE ETC

DISPLAY INSTRUCTIONS:

If DM4 = 1 (used device in last year), display “last” and “any of these”.

If DM5 = 2 (used device for less than a year) and only device displayed at DM5, display “first” and “that”.

If DM5 = 2 (used device for less than a year) and more than one device displayed at DM5, display “first” and “any of these”.

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} use {that/any of these}?

ENTER MONTH

ENTER NUMBER

Range	1 to 12
REFUSED	BOX DM7
DON'T KNOW	BOX DM7

DM6B1**dm5yrfrtcane**

R5 DM6B YEAR FST/LST USE CANE ETC

DISPLAY INSTRUCTIONS:

If DM4 = 1 (used device in last year), display "last" and "any of these".
 If DM5 = 2 (used device for less than a year) and only device displayed at DM5, display "first" and "that".
 If DM5 = 2 (used device for less than a year) and more than one device displayed at DM5, display "first" and "any of these".

Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} use {that/any of these}?

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: CURRENT YEAR-1 to CURRENT YEAR
 Go to BOX DM7.

DM6C**dm5devstmo**

R5 DM6C MONTH DEVICE USE STARTED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM4 = 1 (YES), do not display first sentence and display "any of these devices".

Otherwise, display question text according to the following directions:

If CURRENT INT CANE flag = 1 (YES), display "a cane".

If CURRENT INT WALKER flag = 1 (YES), display "a walker".

If CURRENT INT WHEELCHAIR flag = 1 (YES), display "a wheelchair".

If CURRENT INT SCOOTER flag = 1 (YES), display "a scooter".

If more than one device displayed, display "and" between each one and "these devices." Otherwise, if only one device displayed, display "this device".

If more than one device displayed, display "any of these devices". Otherwise, if only one device displayed, display name of device.

Display "first" in bold underlined text.

QUESTION TEXT:

{In the last month {of {his/her} life}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter} and at the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/SP was} not using {this device/these devices}.}

In what month since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

ENTER NUMBER

Range	1 to 12
REFUSED	BOX DM6D
DON'T KNOW	BOX DM6D

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DM6C=90, go to BOX DM7

DM6C1

dm5devstyr

R5 DM6C1 YEAR DEVICE USE STARTED

QUESTION TEXT:

[In what month and year since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?]

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT MONTH to CURRENT YEAR

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

Go to BOX DM4.

BOX DM6D

BOX DM6D

NOT ON FILE

If [LAST INT CANE flag, WALKER flag, WHEELCHAIR flag, and SCOOTER flag <> 1 (YES)] and [CURRENT INT CANE flag, WALKER flag, WHEELCHAIR flag, or SCOOTER flag = 1 (YES)], go to BOX DM7.

Otherwise, go to DM6D.

DM6D

dm5devendmo

R5 DM6D MONTH DEVICE USE ENDED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DM4 = 1 (YES), do not display first sentence and display "any of these devices".

Otherwise display question intro according to the following instructions:

If LAST INT CANE flag = 1 (YES), display "a cane".

If LAST INT WALKER flag = 1 (YES), display "a walker".

If LAST INT WHEELCHAIR flag = 1 (YES), display "a wheelchair". If LAST INT SCOOTER flag = 1 (YES), display "a scooter".

If more than one device displayed, display "and" between each one and "any of these devices".
Otherwise, if only one device displayed, display "this device".

Display "last" in the phrase "last use" in bold underlined text.

Display "MONTH" in underlined text.

QUESTION TEXT:

{At the time of the last interview in {LAST INT MONTH AND YEAR}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter} and in the last month {of {his/her} life}, {you were/SP was} not using {this device/any of these devices}.

In what month since {LAST INT MONTH AND YEAR} did {you/SP} last use {this device/any of these devices}?

ENTER NUMBER

Range	1 to 12
REFUSED	BOX DM7
DON'T KNOW	BOX DM7

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DM6D=90, go to BOX DM7

DM6D1

dm5devendyr

R5 DM6D1 YEAR DEVICE USE ENDED

QUESTION TEXT:

[In what month and year since {LAST INT MONTH AND YEAR} did {you/SP} first use {{a cane/a walker/ a wheelchair/ a scooter}/any of these devices}?:]

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR-1 to CURRENT YEAR

Hard Range: R1 INT MONTH to CURRENT YEAR

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

Go to BOX DM7.

DM6E

dm5nodev

R5 DM6E NO DEVICE MONTH PLUS

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

For both sentences:

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

First sentence fill:

If CURRENT INT CANE flag = 1 (YES), display "a cane".

If CURRENT INT WALKER flag = 1 (YES), display "a walker".
 If CURRENT INT WHEELCHAIR flag = 1 (YES), display a "wheelchair".
 If CURRENT INT SCOOTER flag = 1 (YES), display "a scooter".

Second sentence fill:

If LAST INT CANE flag = 1 (YES), display "a cane".
 If LAST INT WALKER flag = 1 (YES), display "a walker".
 If LAST INT WHEELCHAIR flag = 1 (YES), display "a wheelchair".
 If LAST INT SCOOTER flag = 1 (YES), display "a scooter."

QUESTION TEXT:

In the last month {of {his/her} life}, {you/SP} used {a cane} {a walker} {a wheelchair} {a scooter}. At the time of the last interview in {LAST INT MONTH AND YEAR}, {you were/{he/she} was} using {a cane} {a walker} {a wheelchair} {a scooter}.

Since {LAST INT MONTH AND YEAR}, did {you/SP} go without using any devices for a month or more?

CODES

1	YES	
2	NO	BOX DM7
90	LAST INTERVIEW INFORMATION INCORRECT	BOX DM7
	REFUSED	BOX DM7
	DON'T KNOW	BOX DM7

DM6F

dm5nodevmos

R5 DM6F MONTHS OF NO DEVICE

QUESTION TEXT:

For about how many months altogether did {you/SP} go without using any devices?

ENTER NUMBER

Range	1 to 24
REFUSED	
DON'T KNOW	

BOX DM7

BOX DM7

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and {AGE on PERSON ROSTER} = 65, go to Section DT - Driving and Transportation.
 Else if NEWSAMPLE flag = 1 (YES) and DM3A = 997 (HELP ENTIRE LIFE), go to BOX DM9.
 Else if NEWSAMPLE flag = 1 (YES) and DM3A = 1-120 and [{AGE ON PERSON ROSTER} - {YEARS FROM DM3A} ≤ 65], go to BOX DM9.
 Else if NEWSAMPLE flag = 1 (YES), go to DM7PRE.
 Else if DECEASED flag = 1 (YES), go to Section SC - Self-Care Activities.
 Otherwise, go to Section DT - Driving and Transportation.

DM7

dm5mobhelp65

R5 DM7 GETTIG HLP W MOBIL AGE 65

DISPLAY INSTRUCTIONS:

Display "help" in bold underlined text.

QUESTION TEXT:

{Were you/Was SP} getting help with getting out of bed, getting around {your/his/her} home or leaving {your/his/her} home around the time when {you/he/she} turned 65?

CODES

1	YES	BOX DM9
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DM8**BOXDM8**

NOT ON FILE

If DM2 = 1 (help for a year or more) or 2 (help for less than a year) or DM1 = 1 (help in last year), go to BOX DM9.
Otherwise, go to DM8.

DM8**dm5snc65mohl**

R5 DM8 SINCE 65 EV GET HLP W MOB

QUESTION TEXT:

Since {you/SP} turned 65, was there any time when {you/he/she} got help with any of these activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX DM9**BOXDM9**

NOT ON FILE

If DM6a= 997 (USED DEVICES ENTIRE LIFE), go to Section DT – Driving & Transportation.
Else if DM6A = 1-120 and {AGE on PERSON ROSTER} – {NUMBER OF YEARS from DM6A} ≤ 65, go to Section DT – Driving & Transportation.
Otherwise, go to DM9.

DM9**dm5at65uscan**

R5 DM9 USE CANE, ETC WHEN TRN 65

QUESTION TEXT:

{Were you/Was SP} using a cane, walker, wheelchair, or scooter around the time when {you/he/she} turned 65?

CODES

1	YES	SECTION DT
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DM10**BOXDM10**

NOT ON FILE

If DM5 = 1 (used device for a year or more) or 2 (used device for less than a year) or DM4 = 1 (used device in last year), go to Section DT -, Driving and Transportation.
Otherwise, go to DM10.

DM10**dm5snc65uscn**

R5 DM10 SINCE TURNED 65 USD CANE

QUESTION TEXT:

Since {you/SP} turned 65, was there any time when {you/he/she} used a cane, walker, wheelchair, or scooter to get around?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section DT – Driving and Transportation

Derived Variables from Items in DM Section

dm5dhlp	R5 D ANY MOBILITY HELP LAST YEAR
dm5dhlpst	R5 D MTHS MOBILITY HELP STARTED
dm5dhlpnd	R5 D MONTHS MOBILITY HELP ENDED
dm5dhlpys	R5 D YEARS OF MOBILITY HELP
dm5ddeviyr	R5 D MOB DEVICE USE LAST YR
dm5ddevist	R5 D MTHS DEVICE USE SINCE START
dm5ddeviend	R5 D MONTHS DEVICE USE SINCE END
dm5ddeviys	R5 D YEARS OF DEVICE USE
dmds5dintvl	R5 D MTHS MONTHS BETWEEN LAST INT AND EITHER CURRENT INT OR DATE OF DEATH
dm5dmohlp	R5 D MONTHS OF MOBILITY HELP
dm5dmodev	R5 D MONTHS OF MOBILITY DEVICE HELP
dm5dmohlpgr	R5 D MOBILITY HELP GROUP
dm5dmodevgr	R5 D MOBILITY DEVICE GROUP
dm5flag	R5 D SPECIAL CASES DM SECTION ROUTE

NHATS Round 5

Section DT [DRIVING AND TRANSPORTATION]

Sequence: 20

BOX DT1PRE

BOX DT1PRE

NOT ON FILE

If R1 NEVERDROVE flag = 1 (YES) and if DIDN'T LEAVE flag = 1 (YES), go to Section HA - Household Activities.

Otherwise, go to DT1PRE.

DT1PRE

DT1PRE

NOT ON FILE

QUESTION TEXT:

The next few questions are about how {you get/SP gets} places.

PRESS 1 AND ENTER TO CONTINUE.

BOX DT1A

BOX DT1A

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and if DIDN'T LEAVE flag = 1 (YES), go to DT2.

Else if NEWSAMPLE flag = 1 (YES), go to DT1.

Else if R1 NEVER DROVE flag = 1 (YES), go to DT4.

Otherwise, go to DT1A.

DT1A

dt5driveyr

R5 DT1A DRIVE IN LAST YEAR

QUESTION TEXT:

Since the time of the last interview in {LAST INT MONTH AND YEAR} did {you/SP}} ever drive {yourself/himself/herself} places?

CODES

1	YES	
2	NO/NO LONGER DRIVE	DT4
	REFUSED	DT4
	DON'T KNOW	DT4

PROGRAMMER INSTRUCTIONS:

If DT1A = 1 (YES), set DROVEINLASTYEAR flag = 1 (YES).

DT1

dt5oftedrive

R5 DT1 HOW OFTEN DRIVE PLACES

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOWCARD DT1

In the last month, how often did {you/SP} drive {yourself/himself/herself} places? Would you say every day, most days, some days, rarely, or never?.

CODES

1	EVERY DAY (7 DAYS A WEEK)
2	MOST DAY S(5-6 DAYS A WEEK)
3	SOME DAY S(2-4 DAYS A WEEK)

- | | |
|---|------------------------------|
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

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

BOX DT2	BOXDT2	NOT ON FILE
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If NEWSAMPLE flag = 1 (YES) and DT1= 5 (NEVER), RF, or DK, go to DT2.
 Else if NEWSAMPLE flag = 1 (YES), go to BOX DT3PRE.
 Else if DT1= 5 (NEVER), RF, or DK, go to DT4.
 Otherwise, go to BOX DT3PRE.

DT2	dt5lastdrove	R5 DT2 WHEN LAST TIME YOU DROVE
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QUESTION TEXT:

When was the last time {you/SP} drove?

INDICATE RESPONSE UNIT

CODES

- | | | |
|---|----------------------|------------|
| 1 | MONTH AND YEAR | DT2A1 |
| 2 | NUMBER OF MONTHS AGO | DT2B |
| 3 | NUMBER OF YEARS AGO | DT2C |
| 4 | AGE WHEN LAST DROVE | DT2D |
| 7 | NEVER DROVE | BOX DT3PRE |
| | REFUSED | BOX DT3PRE |
| | DON'T KNOW | BOX DT3PRE |

DT2A1	dt5mthltdrov	R5 DT2A1 MONTH LAST DROVE
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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	dt5yrldrov	R5 DT2A2 YEAR LAST DROVE
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DISPLAY INSTRUCTIONS:

Display DT2a1 and DT2a2 on the same screen.

Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

ENTER MONTH AND YEAR {SP} LAST DROVE

ENTER 4-DIGIT YEAR

ENTER NUMBER

Range

1910 to 2015

Soft Range

1930 to 2015

PROGRAMMER INSTRUCTIONS:

If date formed by DT2a1 and DT2a2 is later than {TODAY'S DATE}, display Error Message #5.

Hard Range is (CURRENT YEAR - 110) to CURRENT YEAR

Soft Range is (CURRENT YEAR - 80) to CURRENT YEAR

Go to Box DT3PRE.

DT2B

dt5mthagodrv

R5 DT2B MONTHS AGO LAST DROVE

DISPLAY INSTRUCTIONS:

Display "MONTHS" in underlined text.

QUESTION TEXT:

ENTER NUMBER OF MONTHS AGO THAT {SP} last drove

ENTER NUMBER

Range

1 to 24

PROGRAMMER INSTRUCTIONS:

Go to Box DT3PRE.

DT2C

dt5yragoldrv

R5 DT2C HOW MNY YRS AGO LST DROV

DISPLAY INSTRUCTIONS:

Display "YEARS" in underlined text.

QUESTION TEXT:

ENTER NUMBER OF YEARS AGO THAT {SP} LAST DROVE

ENTER NUMBER

Range

1 to 95

Soft Range

1 to 30

PROGRAMMER INSTRUCTIONS:

If DT2c > SP AGE, display error message "CONFIRM RESPONSE. NUMBER OF YEARS AGO LAST DROVE IS GREATER THAN SP'S CURRENT AGE".

Go to Box DT3PRE.

DT2D

dt5ageltdrv

R5 DT2D AGE WHEN LAST DROVE

DISPLAY INSTRUCTIONS:

Display “AGE” in underlined text.

QUESTION TEXT:

ENTER SP’S AGE WHEN LAST DROVE

ENTER NUMBER

Range	14 to 100
Soft Range	16 to 90

PROGRAMMER INSTRUCTIONS:

ERROR CHECK: AGE ENTERED AT DT2D SHOULD BE LESS THAN OR EQUAL TO SP AGE on PERSON ROSTER.

BOX DT3PRE**BOXDT3PRE**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and ((the difference between TODAY’S DATE and date combination in DT2a1 and DT2a2 is less than or equal to 12 months) OR (number of months in DT2b is less than or equal to 12) or (the difference between SP’s current age and the age at DT2d is less than or equal to 1) or DRIVES flag = 1 (YES)), set DROVEINLASTYEAR flag = 1 (YES).

Else if NEWSAMPLE flag = 1 (YES) and DT2 = 7 (NEVER DROVE) set R5 NEVERDROVE flag = 1 (YES).

Else if DIDN’TLEAVE flag = 1 (YES), go to Section HA – HOUSEHOLD ACTIVITIES.

Else if DRIVES flag = 1 (YES), go to DT3PRE.

Otherwise, go to DT4.

DT3PRE**DT4PRE**

NOT ON FILE

QUESTION TEXT:

Now I have some questions about driving situations people sometimes avoid

PRESS 1 AND ENTER TO CONTINUE.

DT3**dt5avoidriv1**

R5 DT3A AVOID DRIVING AT NIGHT

dt5avoidriv2

R5 DT3B AVOID DRIVING ALONE

dt5avoidriv3

R5 DT3C AVOID DRIVING HIGHWAYS

dt5avoidriv4

R5 DT3D AVOID DRIVING BAD WEATHR

DISPLAY INSTRUCTIONS:

If at DT3a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display response option 7. NO RAIN OR BAD WEATHER for DT3D only.

Use "Same Question Stem" display

QUESTION TEXT:

{[]In the last month, did {you/SP} ever avoid driving{[]}

{variable text [a-d]}

RESPONSE 1[a] at night?
 RESPONSE 2[b] alone?
 RESPONSE 3[c] on busy roads or highways?
 RESPONSE 4[d] in the rain or other bad weather?

CODES

1 YES
 2 NO
 7 NO, NO RAIN OR BAD WEATHER
 REFUSED
 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

DT4	dt5getoplc1	R5 DT4A SP WALKED GOT PLACES
	dt5getoplc2	R5 DT4B GOT RIDE FAM FRIEND PD
	dt5getoplc3	R5 DT4C VANSHUTTLE PROV BY PLACE
	dt5getoplc4	R5 DT4D VAN SHUTTLE FOR SENIORS
	dt5getoplc5	R5 DT4E SP TOOK PUBLIC TRANSPRT
	dt5getoplc6	R5 DT4F SP TOOK TAXI GOT PLACES
	dt5getoplc7	R5 DT4G GOT PLACES OTHR SPECIFY

DISPLAY INSTRUCTIONS:

If at DT4a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display "else" if DRIVES flag = 1 (YES).

For variable text [a], if WHEELCHAIR flag = 1 (YES) or SCOOTER flag = 1 (YES), display "or use {your/his/her}".

If WHEELCHAIR flag = 1 (YES), display "wheelchair".

If SCOOTER flag = 1 (YES), display "scooter".

If WHEELCHAIR flag = 1 (YES) and SCOOTER flag = 1 (YES), display "wheelchair or scooter".

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display item c and for variable text [d] display, "not provided by the place {you live/{he/she} lives}"

QUESTION TEXT:

{[]In the last month, how {else} did {you/SP} get to places outside {your/his/her} {home/building}? Did {you/he/she} {[]}

{variable text [a-g]}

RESPONSE 1 [a] walk {or use {your/his/her}} {wheelchair/ scooter/ wheelchair or scooter}?

RESPONSE 2 [b] get a ride from a family member, friend, or someone paid to help?

{RESPONSE 3 [c] use a van or shuttle service provided by the place {you live/{he/she} lives}?

RESPONSE 4 [d] use a van or shuttle service for seniors or people with disabilities {not provided by the place {you live/{he/she} lives}?

RESPONSE 5 [e] take public transportation (the bus, subway, or train)?

RESPONSE 6 [f] take a taxi?

RESPONSE 7 [g] use any other way to get places?

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

If DT4g = 1 (YES OTHER WAYS), go to DT4H.

Otherwise, go to BOX DT5A.

DT4H	DT4H	NOT ON FILE
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QUESTION TEXT:

SPECIFY OTHER WAY OF GETTING AROUND

ENTER TEXT

Length

25

BOX DT5A	BOX DT5A	NOT ON FILE
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If DT4b = 1 (YES, RIDE FROM FAMILY, FRIEND, OR SOMEONE PAID TO HELP), go to DT5A.
Otherwise, go to Section HA - Household Activities.-

DT5A	op5tkplhlp1	R5 DT5A TAKES SP PLACES MOST
	op5relatnshp	R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, which family member, friend, or someone paid to help took {you/SP} places most often?

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

DT5b. [What is (his/her) first name?] CONFIRM SPELLING

DT5c. [What is (his/her) last name?] CONFIRM SPELLING

DT5d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- 2 SPOUSE/PARTNER
- 3 DAUGHTER
- 4 SON
- 5 DAUGHTER-IN-LAW
- 6 SON-IN-LAW
- 7 STEPDAUGHTER

8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For roster selection/addition at DT5A, set TOOK PLACES MOST OFTEN flag = 1 (yes).

Allow only one person to be selected/added to the roster for DT5A.

DT6	dt5otfrfamtk	R5 DT6 ANTH FND FAM MEM TOOK YOU
------------	---------------------	----------------------------------

QUESTION TEXT:

Was there another friend or family member who took {you/SP} places in the last month?

CODES

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

DT7A	op5tkplhlp2	R5 DT7A TAKES SP PLACES OTH
	op5relatnshp	R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who was that (friend or family member who took {you/SP} places in the last month)?

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

DT7b. [What is (his/her) first name?] CONFIRM SPELLING

DT7c. [What is (his/her) last name?] CONFIRM SPELLING

DT7d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER

39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

Allow one roster selection/addition. Set TOOK PLACES flag = 1 (YES) for selection/addition.
Do not allow person selected/added at DT5A to be selected at DT7A.

If selection of person with TOOK PLACES MOST OFTEN flag=1(YES), display message "PERSON ALREADY SELECTED FOR TAKING SP PLACES MOST OFTEN. SELECT/ADD A DIFFERENT PERSON ON ROSTER"

Go to Section HA - Household Activities

Flag Variables Set in DT Section	
f15dneverdrv	R5 F DT SP NEVER DROVE
f15drives	R5 F DT SP DRIVES CAR
f15drvlstyr	R5 F DT SP DROVE CAR IN PAST YR

NHATS Round 5

Section HA [HOUSEHOLD ACTIVITIES]

Sequence: 21

HA1PRE

HA1PRE

NOT ON FILE

QUESTION TEXT:

Next I have a few questions about chores around {your/SP's} {home/apartment/ room/unit/suite/other} and how they got done in the last month.

PRESS 1 AND ENTER TO CONTINUE

HA1

ha5laun

R5 HA1 HOW LAUNDRY GOT DONE

DISPLAY INSTRUCTIONS:

Display HA1, HA1A, HA2, HA2A on same screen.

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

If PROXY flag is null, display "1a".

If PROXY flag = 1 (yes), display "1b".

QUESTION TEXT:

SHOW CARD HA{1a/1b}

Let's start with {your/SP's} laundry. By laundry we mean cleaning {your/{his/her}} clothing, sheets, and towels.

Which answer best describes how {your/SP's} laundry got done in the last month? Did {you/{he/she}} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

CODES

- | | | |
|---|--|------|
| 1 | ALWAYS DID IT BY SELF | HA2 |
| 2 | ALWAYS DID IT TOGETHER WITH SOMEONE ELSE | HA2 |
| 3 | SOMEONE ELSE ALWAYS DID IT | HA3A |
| 4 | IT VARIED (MORE THAN ONE WAY) | |
| 5 | NOT DONE IN LAST MONTH | HA4 |
| | REFUSED | HA5 |
| | DON'T KNOW | HA5 |

HA1A

ha5launslf

R5 HA1A DO LAUNDRY YOURSELF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text

QUESTION TEXT:

In the last month, did {you/SP} ever do {your/{his/her}} laundry by {yourself/himself/herself}?

CODES

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

HA2	ha5whrmachi1	R5 HA2 WASH MACHINE IN HOME
	ha5whrmachi2	R5 HA2 WASH MACHIN IN BUILDING
	ha5whrmachi3	R5 HA2 WASH MACHIN LAUNDROMAT
	ha5whrmachi4	R5 HA2 WASH MACHIN SINK IN HOME
	ha5whrmachi5	R5 HA2 WASH MACH SINK IN BUILDNG
	ha5whrmachi6	R5 HA2 WASH MACHIN OTHR SPECIFY

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display “or building”.
If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display responses 2 and 5.

QUESTION TEXT:

In the last month, when {you/SP} did {your/{his/her}} laundry, where did {you/{he/she}} do that? Did {you/{he/she}} use a machine in {your/{his/her}} home {or building}, at a Laundromat, or what?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	MACHINE IN HOME	BOX HA3A
2	{MACHINE ELSEWHERE IN BUILDING}	BOX HA3A
3	LAUNDROMAT	BOX HA3A
4	SINK IN HOME	BOX HA3A
5	{SINK ELSEWHERE IN BUILDING}	BOX HA3A
91	OTHER (SPECIFY)	
	REFUSED	BOX HA3A
	DON'T KNOW	BOX HA3A

HA2A	HA2A	NOT ON FILE
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QUESTION TEXT:

SPECIFY WHERE {SP} DID LAUNDRY.

ENTER TEXT

Length

50

BOX HA3A	BOX HA3A	NOT ON FILE
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If HA1 = 1 (always by self), go to HA5.
Otherwise, go to HA3a.

HA3A	op5launhlp	R5 HA3A HELPS SP WITH LAUNDRY
	op5relatnshp	R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA1 = 2 (always with someone else) display “when {you/SP} did {your/{his/her}} laundry, who did that with {you/him/her}”.

If HA1 = 3 (someone else always did), display “who did {your/SP’s} laundry for {you/{him/her}}”.

If HA1 = 4 (varied) display “who did {your/SP’s} laundry with {you/{him/her}} or for {you/{him/her}}”.

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, {when {you/SP} did {your/{his/her}} laundry, who did that with {you/{him/her}}/who did {your/SP’s} laundry for {you/{him/her}}/who did {your/SP’s} laundry with {you/{him/her}} or for {you/{him/her}}?}

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives}, or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

HA3b. [What is (his/her) first name?] CONFIRM SPELLING

HA3c. [What is (his/her) last name?] CONFIRM SPELLING

HA3d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN

26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at HA3, set HELPEDWITHLAUNDRY flag = 1 (yes).

BOX HA4

BOX HA4

NOT ON FILE

If HA1 = 2 (always with someone else) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to HA6.

If HA1 = 3 (someone else always did) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA7.

If HA1 = 4 (varied) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA5.

Otherwise go to HA4.

HA4

ha5dlaunreas

R5 D LAUNDRY REASN WITH BY OTHER

DISPLAY INSTRUCTIONS:

If HA1 = 2 (always with someone else), display "with".

If HA1 = 3 (someone else always did), display "for".

If HA1 = 4 (varied), display "with or for".

If HA1 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns, with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers.

QUESTION TEXT:

{What is the reason someone else did {your/SP's} laundry {with/for/with or for} {you/{him/her}}?} Was that because of {your/SP's} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES

- | | |
|---|---|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE,
MEMORY, VISION, HEALTH CONDITION/DISEASE
NAMES, SURGERY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY, |

ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE
TO DO IT
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If HA4 = (HEALTH OR FUNCTIONING), set, HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes).

BOX HA5

BOX HA5

NOT ON FILE

If HA1a = 1 (yes by self), go to HA5.
If HA1 = 2 (always with someone else) or HA1a ≠ 1 (didn't do by self), go to HA6.

[If HA1 = 3 (someone else always did) or HA1 = 5 (not done in last month)] and
HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes), go to BOX HA7.

Otherwise, go to HA20PRE.

HA5

ha5laundif

R5 HA5 DIFF DOING LAUNDRY BY SELF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have doing laundry by {yourself/himself/herself}.
Would you say none, a little, some, or a lot?

CODES

1	NONE
2	A LITTLE
3	SOME
4	A LOT
	REFUSED
	DON'T KNOW

HA6

ha5launoft

R5 HA6 HOW OFTEN DO LAUNDRY

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} do {your/{his/her}} laundry more often, less often, or about the same?

CODES

1	MORE OFTEN
2	LESS OFTEN
3	SAME
	REFUSED
	DON'T KNOW

BOX HA7

BOX HA7

NOT ON FILE

If [HA1 = 1 (always by self) or HA1 = 4 (varied)] and [HA5 = 2 (a little difficulty) or HA5 = 3 (some difficulty) or HA5 = 4 (a lot of difficulty)], go to HA7.

If [HA1 = 2 (always with someone else) or HA1 = 3 (someone else always did) or HA1 = 4 (varied) or HA1 = 5 (not done in last month)] and [HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes) or HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA7.

Otherwise, go to HA2oPRE

HA7**ha5launwout****R5 HA7 EVER GO WOUT CLEAN LAUNDR****DISPLAY INSTRUCTIONS:**

If HA1 = 1 (always did by self) or 5 (not done in last month) or HA1a = 1 (yes by self), display “it was too difficult to do by {yourself/himself/herself}”.

Otherwise, display “no one was there to help or do that for {you/{him/her}}”.

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without clean laundry because {it was too difficult to do by {yourself/himself/herself} / no one was there to help or do that for {you/him/her}}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA2oPRE**HA2oPRE****NOT ON FILE****QUESTION TEXT:**

The next few questions are about shopping for groceries or personal items.

IF NEEDED: By personal items, we mean things like toiletries that you can buy at the grocery or drug store.

PRESS 1 AND ENTER TO CONTINUE

HA2o**ha5shop****R5 HA2o 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**ha5shopslf**

R5 HA20A EVER SHOP BY YOURSELF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever do {your/{his/her}} shopping by {yourself/himself/herself}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA22**ha5showpaygr1**

R5 HA22 PAY GROC PERS ITMS CASH

ha5showpaygr2

R5 HA22 PAY GROC PERS ITMS CHCK

ha5showpaygr3

R5 HA22 PAY GROC PERS ITMS DEBIT

ha5showpaygr4

R5 HA22 PAY GROC PERS CREDIT

ha5showpaygr5

R5 HA22 PAY GROC PERS FOOD STMP

ha5showpaygr6

R5 HA22 PAY GROC PERS SMON ELS

ha5showpaygr7

R5 HA22 PAY GROC PERS OTHR SPEC

QUESTION TEXT:

SHOW CARD HA2

In the last month, when {you/SP} shopped for groceries or other personal items, did {you/{he/she}} pay for them with cash, check, debit card, credit card, or some other way?

SELECT ALL THAT APPLY

CODES**CODE ALL THAT APPLY**

1	CASH
2	CHECK
3	DEBIT OR GIFT CARD
4	CREDIT CARD
5	FOOD STAMPS
6	SOMEONE ELSE PAYS
91	OTHER
	REFUSED
	DON'T KNOW

HA23	ha5howgtstr1	R5 HA23 DROVE TO THE STORE
	ha5howgtstr2	R5 HA23 FAM FRND PD HLP DROVE
	ha5howgtstr3	R5 HA23 VAN PLACE SP LIVES DROVE
	ha5howgtstr4	R5 HA23 VAN 4 DIS SENIORS DROVE
	ha5howgtstr5	R5 HA23 PUBLIC TRANSPORT TO STORE
	ha5howgtstr6	R5 HA23 SP TOOK TAXI 2 THE STORE
	ha5howgtstr7	R5 HA23 SP WALKED TO STORE
	ha5howgtstr8	R5 HA23 OTHR SPECIFY TO STORE

DISPLAY INSTRUCTIONS:

If DT1 = 1 (drives every day), 2 (drives most days), 3 (drives some days) or 4 (rarely) OR DROVEINLASTYEAR flag = 1 (yes), display “drive,” and response 1.

If FACILITY flag = 1 (yes), display “use a service provided by the place where {you live/{he/she} lives},”.

If FACILITY flag = 1 (yes) or RETIREMENTCOMMUNITY flag = 1 (YES), display response 3 and for response 4, “not provided by the place SP lives”.

DISPLAY “In the last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD HA3

In the last year, how did {you/SP} get to the store to shop for groceries or personal items? Did {you/{he/she}} {drive,} get a ride from a family member or friend, {use a service provided by the place where {you live/{he/she} lives},} or what?

SELECT ALL THAT APPLY

CODES	CODE ALL THAT APPLY	
1	{DROVE}	HA24A
2	GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP	HA24A
3	{USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LIVES}	HA24A
4	{USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {(NOT PROVIDED BY THE PLACE SP LIVES)}	HA24A
5	TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM)	HA24A
6	TOOK A TAXI	HA24A
7	WALKED	HA24A
91	OTHER (SPECIFY)	
	REFUSED	HA24A
	DON'T KNOW	HA24A

HA23A	HA23A	NOT ON FILE
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QUESTION TEXT:

SPECIFY HOW GOT TO STORE.

ENTER TEXT

Length

50

HA24A

ha5shopcart

R5 HA24B EVER USE MOTORIZED CART

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, when {you/SP} went to the store to shop did {you/{he/she}} ever use a motorized cart?

CODES

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

HA24B

ha5shoplean

R5 HA24B EVER LEAN ON SHOP CART

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, when {you/SP} went to the store to shop did {you/{he/she}} ever lean on the shopping cart to help {you/{him/her}} get around the store?

CODES

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

BOX HA25A

BOX HA25A

NOT ON FILE

If HA20 = 1 (always by self) go to HA27.
Otherwise, go to HA25A.

HA25A

op5shoplp

R5 HA25A HELPS SP WITH SHOPPING

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA20 = 2 (always with someone else), display “when {you/SP} shopped for groceries or personal items, who did that with {you/{him/her}}”.

If HA20 = 3 (someone else always did), display “who shopped for groceries or personal items for {you/SP}”.

If HA20 = 4 (varied), display “who shopped for groceries or personal items with {you/SP} or for {you/{him/her}}”.

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, {when {you/SP} shopped for groceries or personal items, who did that with {you/{him/her}} / who shopped for groceries or personal items for {you/SP} /who shopped for groceries or personal items with {you/SP} or for you/{him/her}}?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives}, or someone paid to help {you/{him/her}}.

PROBE: Anyone else? SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA25b. [What is (his/her) first name?] CONFIRM SPELLING

HA25c. [What is (his/her) last name?] CONFIRM SPELLING

HA25d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE

32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at HA25, set HELPEDWITHSHOPPING flag = 1 (yes).

BOX HA26

BOX HA26

NOT ON FILE

If HA20 = 2 (always with someone else) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA28.

If HA20 = 3 (someone else always did) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA29.

If HA20 = 4 (varied) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA27.

Otherwise go to HA26

HA26

ha5dshopreas

R5 D SHOP REASN WITH BY OTHERS

DISPLAY INSTRUCTIONS:

If HA20 = 2 (always with someone else), display "with". If

HA20 = 3 (someone else always did), display "for".

If HA20 = 4 (varied), display "with or for".

If HA20 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as the column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers.

QUESTION TEXT:

{What is the reason someone else shopped for groceries or personal items {with/for/with or for} {you/SP}?} Was that because of {your/SP's} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES

Code All That Apply

- | | |
|---|--|
| 1 | HEALTH OR FUNCTIONING INCLUDES: AGE,
MEMORY, VISION, HEALTH CONDITION/DISEASE
NAMES, SURGERRY, UNABLE TO DRIVE |
| 2 | OTHER REASON INCLUDES: SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T
LIKE TO DO IT
REFUSED |

BOX HA27

DON'T KNOW

BOX HA27

PROGRAMMER INSTRUCTIONS:

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

BOX HA27

BOX HA27

NOT ON FILE

If HA20a = 1 (yes by self), go to HA27.
If HA20 = 2 (always with someone else) or HA20a ≠ 1 (didn't do by self), go to HA28.

If [HA20 = 3 (someone else always did) or HA20 = 5 (not done in last month)] and HEALTHREASONHELPWITHSHOPPING flag = 1 (yes), go to BOX HA29.

Otherwise, go to HA30PRE.

HA27

ha5shopdif

R5 HA27 DIFF SHOPPING BY SELF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have shopping for groceries or personal items by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

1	NONE
2	A LITTLE
3	SOME
4	A LOT
	REFUSED
	DON'T KNOW

HA28

ha5shopoft

R5 HA28 HOW OFT SHOP GROCERIES

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} shop for groceries or personal items more often, less often, or about the same?

CODES

1	MORE OFTEN
2	LESS OFTEN
3	SAME
	REFUSED
	DON'T KNOW

BOX HA29

BOX HA29

NOT ON FILE

If [HA20 = 1 (always by self) or HA20 = 4 (varied)] and [HA27 = 2 (a little) or HA27 = 3 (some) or HA27 = 4 (a lot)], go to HA29.

If [HA20 = 2 (always with someone else) or HA20 = 3 (someone else always did) or HA20 = 4 (varied) or HA20 = 5 (not done in last month)] and [HEALTHREASONHELPWITHSHOPPING flag = 1 (yes) or

HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMONE FROM PLACE SP LIVES, go to HA29.

Otherwise go to HA30PRE.

HA29**ha5shopwout**

R5 HA29 EVER GO WITHOUT GROCERIES

DISPLAY INSTRUCTIONS:

If HA20=1 (always by self) or 5 (not done in last month), or HA20a = 1 (yes by self), display “it was too difficult to shop by {yourself/himself/herself}”.

If HA20=2 (always with someone else) or 3 (someone else always did), display “no one was there to help or shop for {you/{him/her}}”?

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without groceries or personal items because {it was too difficult to shop by {yourself/himself/herself} / no one was there to help or shop for {you/{him/her}}}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA30PRE**HA30PRE**

NOT ON FILE

QUESTION TEXT:

Now let's turn to making hot meals.

PRESS 1 AND ENTER TO CONTINUE

HA30**ha5meal**

R5 HA30 HOW HOT MEALS GET MADE

DISPLAY INSTRUCTIONS:

If PROXY flag is null, display “1a”.

If PROXY flag = 1 (yes), display “1b”.

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

QUESTION TEXT:

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} hot meals got made in the last month? Did {you/{he/she}} always make them by {yourself/himself/herself}, always make them together with someone else, did someone else always make them for {you/{her/him}}, or did it vary?

CODES

1	ALWAYS DID IT BY SELF	HA30B
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA30B
3	SOMEONE ELSE ALWAYS DID IT	HA30B
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	HA33
	REFUSED	HA34
	DON'T KNOW	HA34

HA30A**ha5mealslf**

R5 HA30A MAKE HOT MEALS YOURSELF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever make {your/{his/her}} hot meals by {yourself/himself/herself}?

CODES

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

HA30B**ha5restamels**

R5 HA30B OFTN HAV RESTARNT MEALS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display "Do not include meals provided as a service by the place {you live/{he/she} lives}."

QUESTION TEXT:

SHOW CARD HA4

In the last month, when {you/SP} had hot meals, how often were they restaurant meals, including eat-in, take-out, or delivered meals? {Do not include meals provided as a service by the place {you live/{he/she} lives}.} Was it every time {you/{he/she}} had a hot meal, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

HA30C**ha5mealwheel**

R5 HA30C OFTN GET MEALS ON WHEEL

QUESTION TEXT:

SHOW CARD HA4

In the last month, when {you/SP} had hot meals, how often were they from Meals on Wheels or other food assistance programs? Was it every time {you/{he/she}} had a hot meal, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX HA31**BOX HA31**

NOT ON FILE

If HA30 = 3 (SOMEONE ELSE ALWAYS DID IT), go to HA32A.
Else if HA14 = 1 (has microwave), go to HA31.
Otherwise, go to BOX HA32A.

HA31**ha5oftmrcrow**

R5 HA31 OFTEN USE THE MICROWAVE

QUESTION TEXT:

SHOW CARD HA4

In the last month, when {you/SP} made hot meals did {you/{he/she}} use the microwave oven every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX HA32A**BOX HA3A**

NOT ON FILE

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

HA32A**op5mealhlp**

R5 HA32A HELPS SP WITH MEALS

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display RESTAURANT/TAKE OUT SERVICES and MEALS ON WHEELS on the person roster.

If HA30 = 2 (always with someone else), display "when {you/SP} made hot meals, who did that with {you/{him/her}}".

If HA30 = 3 (someone else always did), display "who made hot meals for {you/SP}".

If HA30 = 4 (varied), display "who made hot meals with {you/SP} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, {when {you/SP} made hot meals, who did that with {you/{him/her}} / who made hot meals for {you/SP} / who made hot meals with {you/SP} or for {you/{him/her}}}

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},}
or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA32b. [What is (his/her) first name?] CONFIRM SPELLING

HA32c. [What is (his/her) last name?] CONFIRM SPELLING

HA32d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at HA25, set HELPEDWITHMEALS flag = 1 (yes).

BOX HA33**BOX HA33**

NOT ON FILE

If HA30 = 2 (always with someone else) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA35.

If HA30 = 3 (someone else always did) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA36.

If HA30 = 4 (varied) and HELPEDWITHMEALS flag= 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA34.

Otherwise go to HA33

HA33**ha5dmealreas**

R5 D MEALS REASN WITH BY OTHERS

DISPLAY INSTRUCTIONS:

If HA30 = 2 (always with someone else), display "with".

If HA30 = 3 (someone else always did), display "for".

If HA30 = 4 (varied), display "with or for".

If HA30 = 5 (none made in last month), do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below the corresponding column headers.

QUESTION TEXT:

{What is the reason someone else made hot meals {with/for/with or for} {you/SP}?} Was that because of {your/SP's} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1

HEALTH OR FUNCTIONING INCLUDES: AGE,
MEMORY, VISION, HEALTH CONDITION/DISEASE
NAMES, SURGERRY, UNABLE TO DRIVE

2

OTHER REASON INCLUDES: SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T
LIKE TO DO IT
REFUSED
DON'T KNOW

BOX HA34

BOX HA34

PROGRAMMER INSTRUCTIONS:

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

BOX HA34**BOX HA34**

NOT ON FILE

If HA30a = 1 (yes by self), go to HA34.

If HA30 = 2 (always with someone else) or HA30a ≠ 1 (didn't do by self), go to HA35.

If [HA30 = 3 (someone else always did) or HA30 = 5 (not done in last month)] and HEALTHREASONHELPWITHMEALS flag = 1 (yes), go to BOX HA36.

Otherwise, go to HA40PRE.

HA34**ha5dmeal dif****R5 HA34 DIFFICULTY MAK MEALS SELF****DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have shopping for groceries or personal items by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

- | | |
|---|------------|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

HA35**ha5meal oft****R5 HA35 HOW OFTEN MAKE HOT MEALS****DISPLAY INSTRUCTIONS:**

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} make hot meals more often, less often, or about the same?

CODES

- | | |
|---|------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

BOX HA36**BOX HA36****NOT ON FILE**

If [HA30 = 1 (always by self) or HA30 = 4 (varied)] and [HA34 = 2 (a little) or HA34 = 3 (some) or HA34 = 4 (a lot)], go to HA36.

If [HA30 = 2 (always with someone else) or HA30 = 3 (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**ha5meal wout****R5 HA36 EVER GO WITHOUT HOT MEAL****DISPLAY INSTRUCTIONS:**

If HA30 =1 (always by self) or 5 (not done in last month) or HA30a = 1 (yes by self), display “it was too difficult to make one by {yourself/himself/herself}”.

If HA30 =2 (always with someone else) or 3 (someone else always did), display “no one was there to help or make one for {you/{him/her}}”?

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without a hot meal because {it was too difficult to make one by {yourself/himself/herself} / no one was there to help or make one for {you/him/her}}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA40PRE

HA40PRE

NOT ON FILE

QUESTION TEXT:

Now I have a few questions about everyday money matters like handling bills and banking.

IF NEEDED: By handling bills, we mean writing checks, sending money orders or paying with cash. By banking we mean checking balances, and making transfers, deposits or withdrawals from the bank or ATM.

PRESS 1 AND ENTER TO CONTINUE

HA40

ha5bank

R5 HA40 HOW BILLS BANKIN HANDLED

DISPLAY INSTRUCTIONS:

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

If PROXY flag is null, display “1a”.

If PROXY flag = 1 (yes), display “1b”.

QUESTION TEXT:

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} bills and banking were handled in the last month? Did {you/{he/she}} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

CODES

1	ALWAYS DID IT BY SELF	HA44
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA42A
3	SOMEONE ELSE ALWAYS DID IT	HA42A
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	HA43
	REFUSED	HA44
	DON'T KNOW	HA44

HA40A

ha5bankslf

R5 HA40A HNDL BILLS BNKING YRSLF

DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever handle {your/{his/her}} bills and banking by {yourself/himself/herself}?

CODES

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

HA42A**op5bankhlp**

R5 HA42A HELPS SP WITH BANKING

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = YES(yes), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If HA40 = 2 (always with someone else), display "when {you/SP} handled bills and banking, who did that with {you/{him/her}}".

If HA40 = 3 (someone else always did), display "who handled bills and banking for {you/SP}".

If HA40 = 4 (varied), display "who handled bills and banking with {you/SP} or for {you/{him/her}}".

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, {when {you/SP} handled bills and banking, who did that with {you/{him/her}} / who handled bills and banking for {you/SP} /who handled bills and banking with {you/SP} or for {you/{him/her}}}

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA42b. [What is (his/her) first name?] CONFIRM SPELLING

HA42c. [What is (his/her) last name?] CONFIRM SPELLING

HA42d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|---|-----------------|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |

7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at HA25, set HELPEDWITHBANKING flag = 1 (yes).

BOX HA43

BOX HA43

NOT ON FILE

If HA40 = 2 (always with someone else) HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA45.

If HA40 = 3 (someone else always did) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA46.

If HA40 = 4 (varied) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA44.

Otherwise go to HA43.

HA43

ha5dbankreas

R5 D BANK BILL REASON WITHBY OTH

DISPLAY INSTRUCTIONS:

If HA40 = 2 (always with someone else), display “with”.
 If HA40 = 3 (someone else always did), display “for”.
 If HA40 = 4 (varied), display “with or for”.
 If HA40 = 5 (not done in last month) do not display first sentence.

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.

Display responses in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below the corresponding column headers.

QUESTION TEXT:

{What is the reason someone else handled bills and banking {with/for/with or for} {you/{him/her}}?} Was that because of {your/{his/her}} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERRY, UNABLE TO DRIVE	
2	OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT	
	REFUSED	BOX HA44
	DON'T KNOW	BOX HA44

PROGRAMMER INSTRUCTIONS:

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

BOX HA44	BOX HA44	NOT ON FILE
<p>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.</p> <p>If [HA40 = 3 (someone else always did) or HA40 = 5 (not done in last month)] and HEALTHREASONHELPWITHBANKING flag = 1 (yes), go to BOX HA46.</p> <p>Otherwise, go to HA50PRE.</p>		

HA44	ha5bankdif	R5 HA44 DIF HNDL BLLS BNKING SLF
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DISPLAY INSTRUCTIONS:

Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have handling {your/his/her} bills and banking by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES	
1	NONE
2	A LITTLE
3	SOME
4	A LOT
	REFUSED

DON'T KNOW

HA45

ha5bankoft

R5 HA45 HOW OFTEN YOU PAY BILLS

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} handle {your/his/her} own bills and banking more often, less often, or about the same?

CODES

- | | |
|---|------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

BOX HA46

BOX HA46

NOT ON FILE

If [HA40 = 1 (always by self) or HA40 = 4 (varied)] and [HA44 = 2 (a little) or HA44 = 3 (some) or HA44 = 4 (a lot)], go to HA46.

If [HA40 = 2 (always with someone else) or HA40 = 3 (some else always did) or HA40 = 4 (varied) or HA40 = 5 (not done in last month)] and [HEALTHREASONHELPWITHBANKING flag = 1 (yes) or HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA46.

Otherwise go to HA50PRE.

HA46

ha5bankwout

R5 HA46 EVER GO WOUT PAYIN BILLS

DISPLAY INSTRUCTIONS:

If HA40=1 (always by self) or 5 (not done in last month) or HA40a = 1 (yes by self), display "it was too difficult to do that by {yourself/himself/herself}".

If HA40=2 (always with someone else) or 3 (someone else always did), display "no one was there to help or do that for {you/{him/her}}".

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without handling {your/his/her} bills and banking matters because {it was too difficult to do that by {yourself/himself/herself} / no one was there to help or do that for {you/{him/her}}}?

CODES

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

HA50PRE

HA50PRE

NOT ON FILE

QUESTION TEXT:

Now let's turn to less common money matters, such as opening, closing or cashing in CDs, checking, money market or retirement accounts or applying for loans.

PRESS 1 AND ENTER TO CONTINUE

HA50

ha5money

R5 HA50 MONEY MATTERS TO HANDLE

DISPLAY INSTRUCTIONS:

Display "in the last year" in underlined text.

QUESTION TEXT:

In the last year, did {you/SP} have money matters like these that needed to be handled?

IF NEEDED: Money matters include opening, closing or cashing in CDs, checking, money market or retirement accounts, or applying for loans.

CODES

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

HA51

ha5moneyhlp

R5 HA51 ANYONE HLP W MONY MATTRS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display "a service provided by the place where {you live/SP lives},"

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

QUESTION TEXT:

In the last year, did anyone help {you/SP} or handle these kinds of money matters for {you/{him/her}}? This includes family, friends, {a service provided by the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

IF NEEDED: Money matters include opening, closing or cashing in CDs, checking, money market or retirement accounts or applying for loans.

CODES

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

HA52A

op5moneyhlp

R5 HA52A HELPS SP WITH MONEY

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE

SP LIVES/DIED on the person roster.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who was that?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/{he/she} lives}}, or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

HA52b. [What is (his/her) first name?] CONFIRM SPELLING

HA52c. [What is (his/her) last name?] CONFIRM SPELLING

HA52d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |

- 38 CO-WORKER
- 39 MINISTER, PRIEST, OR OTHER CLERGY
- 40 PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
- 91 OTHER RELATIVE
- 92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at HA25, set HELPEDWITHMONEYMATTERS flag = 1 (yes).

Go to Section SC – Self-care Activities.

Derived Variables from Items in HA Section	
ha5dlaunsfdf	R5 D LAUNDRY SELF AND DIFF LEVEL
ha5dshopsfdf	R5 D SLF SHOPPING AND DIFF LEVEL
ha5dmealsfdf	R5 D SELF MEALS AND DIFF LEVEL
ha5dbanksfdf	R5 D SELF BANKS AND DIFF LEVEL
ha5dmealwhl	R5 D SP RECEIVES MEALS ON WHEELS
ha5dmealtkot	R5 D SP RECEIVES TAKE OUT MEALS
ha5dlaunreas	R5 D LAUNDRY REASN WITH BY OTHERS (see HA4)
ha5dshopreas	R5 D SHOP REASN WITH BY OTHERS (see HA26)
ha5dmealreas	R5 D MEALS REASN WITH OTHERS (see HA33)
ha5dbankreas	R5 D BANK BILL REASON WITHBY OTH (see HA43)

NHATS Round 5

Section SC [SELF-CARE ACTIVITIES]

Sequence: 22

SC1PRE

SC1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “SP ate”.
Otherwise, display “you eat/SP eats”.

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

PRESS 1 AND ENTER TO CONTINUE

SC1

sc5eatdev

R5 SC1 EVER USE ADAPTED UTENSILS

DISPLAY INSTRUCTIONS:

Display “adapted” in bold underlined text.

If DECEASED flag = 1 (YES), display “of {his/her} life”.

QUESTION TEXT:

In the last month {of {his/her} life}, did {you/SP} ever use adapted utensils to help {you/{him/her}} eat or cut {your/{his/her}} food?

IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

CODES

- 1 YES
- 2 NO
- 7 ALWAYS FED THROUGH OR TUBE
REFUSED
DON'T KNOW

BOX SC2

BOX SC2

NOT ON FILE

If SC1 = 7 (FEEDING TUBE), go to SC7PRE.

Else if DECEASED flag = 1 (YES), go to SC3.

Else if SC1 = 1 (YES), go to SC2.

Otherwise, go to SC3.

SC2

sc5eatdevoft

R5 SC2 OFTEN USE ADAPTED UTENSILS

QUESTION TEXT:

SHOW CARD SC1

Did {you/SP} use adapted utensils every time {you/{he/she}} had a meal, most times, sometimes, or rarely?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| | REFUSED |
| | DON'T KNOW |

SC3**sc5eathlp**

R5 SC3 DID ANYONE HELP YOU EAT

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (YES), display "a staff person from the place where {you live/{he/she}{lives/lived}},".
 If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".
 Otherwise, display "lives".

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} eat, for instance, by cutting up food or feeding {you/{him/her}}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she}{lives/lived}}, or someone paid to help {you/{him/her}}.

CODES

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

BOX SC3A**BOX SC3A**

NOT ON FILE

If SC3=1 (YES), go to SC3a.

Else if DECEASED flag=1 (YES), go to SC7PRE.

Otherwise, go to SC5.

SC3A**op5eathlp**

R5 SC3A HELPS SP WITH EATING

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who helped {you/SP} eat?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC3b. [What is (his/her) first name?] CONFIRM SPELLING

SC3c. [What is (his/her) last name?] CONFIRM SPELLING

SC3d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX SC4

BOX SC4

NOT ON FILE

If DECEASED flag=1 (YES), go to SC7PRE.

Otherwise, go to SC4.

SC4

sc5eatslfoft

R5 SC4 HOW OFTEN EAT BY YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month when {you/SP} ate, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	BOX SC6
	REFUSED	BOX SC6
	DON'T KNOW	BOX SC6

SC5

sc5eatslfdif

R5 SC5 DIFFICULTY EATING BY SELF

DISPLAY INSTRUCTIONS:

If SC1 = 1 (used adapted utensils), display "when {you/SP} used adapted utensils,".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used adapted utensils,} how much difficulty did {you/{he/she}} have eating by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

1	NONE
2	A LITTLE
3	SOME
4	A LOT
	REFUSED
	DON'T KNOW

BOX SC6

BOXSC6

NOT ON FILE

If SC3 = 2 (no help with eating) and SC5 = 1 (no difficulty eating), go to SC7PRE.

Otherwise, go to SC6.

SC6

sc5eatwout

R5 SC6 GO WOUT EAT BECSE NO HELP

DISPLAY INSTRUCTIONS:

If SC4 = 4 (never ate by self w/out help), display “no one was there to help”

Otherwise, display “it was too difficult to feed {yourself/{himself/herself}}”.

QUESTION TEXT:

In the last month, did {you/SP} ever go without eating because {no one was there to help/it was too difficult to feed {yourself/{himself/herself}}}?

CODES

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

SC7PRE**SC7PRE**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “SP got”.
Otherwise, display “you get/SP gets”.

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

PRESS 1 AND ENTER TO CONTINUE

SC7**sc5showrbat1**

R5 SC7 SP SHOWERED

sc5showrbat2

R5 SC7 SP TOOK BATHS IN A TUB

sc5showrbat3

R5 SC7 SP WASHED SOME OTHR WAY

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “of {his/her} life” and “{he/she} took”.

Otherwise, display “you take/{he/she} takes”.

QUESTION TEXT:

In the last month {of {his/her} life}, how did {you/SP} usually clean {yourself/himself/herself} up? By taking a shower, bathing in a tub, or washing up some other way?

IF NEEDED: Do not include whirlpool baths {you take/{he/she} takes}/{he/she} took} for therapy.

SELECT ALL THAT APPLY

CODES**Code All That Apply**

- | | |
|---|--------------------------|
| 1 | SHOWERED |
| 2 | TOOK BATHS IN A TUB |
| 3 | WASHED UP SOME OTHER WAY |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

If SC7 = 1 (showered) and SC7 # 2 (took baths) and SC7 # 3 (washed up), set SHOWERING flag = 1 (yes).

If SC7 = 2 (took baths) and SC7 # 1 (showered) and SC7 # 3 (washed up), set TAKINGBATHS flag = 1 (yes).

If SC7 = 3 (washed up) and SC7 # 1 (showered) and SC7 # 2 (took baths), set WASHINGUP flag = 1 (yes).

BOX SC7A**BOX SC4A**

NOT ON FILE

If DECEASED flag = 1 (YES) and SC7 = 1 (SHOWERED), 2 (BATHS), or 3 (WASH OTHER WAY), go to SC7A.

Else if DECEASED flag <> 1 (YES) and more than one response to SC7, go to SC8.

Else if DECEASED flag <> 1 (YES) and only one response at SC7, go to BOX SC9.

Otherwise, if SC7 = RF or DK, go to SC16PRE.

SC7A

sc5bdevdec

R5 SC7A USE BATH DEVICE IN LML

DISPLAY INSTRUCTIONS:

If SC7=1 display “showering”.

If SC7=2 display “bathing”.

If SC7=3 display “washing up”.

If more than one answer displayed, separate by “or”.

QUESTION TEXT:

In the last month of {his/her} life, did {SP} ever use grab bars or a shower or tub seat when {showering/bathing/washing up}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. A shower or tub seat is a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

CODES

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

SC8

sc5prfrshbth

R5 SC8 PREFER SHOWER 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

sc5scusgrbrs

R5 SC9 HOW OFTEN USE GRAB BARS

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “showered”.
If TAKINGBATHS flag = 1 (yes), display “took a bath”.

QUESTION TEXT:

SHOW CARD SC3

In the last month, did {you/SP} use grab bars every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX SC10

BOXSC10

NOT ON FILE

If BATHSEAT flag = 1 (yes) and [SHOWERING flag = 1 (yes) or TAKINGBATHS flag = 1 (yes)], go to SC10.
Otherwise, go to SC11.

SC10

sc5shtubseat

R5 SC10 OFTN USE SHOWR TUB SEAT

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “showered”.
If TAKINGBATHS flag = 1 (yes), display “took a bath”.

QUESTION TEXT:

SHOW CARD SC3

In the last month, did {you/SP} use the shower or tub seat every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A shower or tub seat is a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

SC11**sc5bathhlp**

R5 SC11 ANYN HLP SHOWR BATH OTHR

DISPLAY INSTRUCTIONS:

If SC7 = 1 (showered) or SHOWERING flag = 1 (YES), display “shower”.
 If SC7 = 2 (took baths) or TAKINGBATHS flag = 1 (YES), display “take a bath”.
 If SC7 = 3 (washed up) or WASHINGUP flag = 1 (YES), display “wash up”.
 If more than one answer displayed, separate by “or”.

If FACILITY flag = 1 (YES), display “a staff person from the place where {you live/{he/she} {lives/lived}}”.
 If DECEASED flag = 1 (YES), display “of {his/her} life” and “lived”.
 Otherwise, display “lives”.

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} {shower/ take a bath/wash up}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}}, or someone paid to help {you/{him/her}}.

CODES

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

BOX SC11A**BOX SC11A**

NOT ON FILE

If SC11=1 (YES), go to SC11a.

Else if DECEASED flag=1 (YES), go to SC16PRE.

Otherwise, go to SC13.

SC11A**op5bathhlp**

R5 SC11A HELPS SP WITH BATHING

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “shower”.
 If TAKINGBATHS flag = 1 (yes), display “take a bath”.
 If WASHINGUP flag = 1 (yes), display “wash up”.

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who helped {you/SP} {shower/take a bath/wash up}?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC11b. [What is (his/her) first name?] CONFIRM SPELLING

SC11c. [What is (his/her) last name?] CONFIRM SPELLING

SC11d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |
| 91 | OTHER RELATIVE |

PROGRAMMER INSTRUCTIONS:

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

BOX SC12**BOX SC12**

NOT ON FILE

If DECEASED flag = 1 (YES), go to SC16PRE.

Otherwise, go to SC12.

SC12**sc5bathoft**

R5 SC12 HOW OFTEN BATHE YOURSELF

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “showered”.

If TAKINGBATHS flag = 1 (yes), display “took a bath”.

If WASHINGUP flag = 1 (yes), display “washed up”.

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP}{showered/ took a bath/ washed up}, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

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

SC14
SC14
SC14

SC13**sc5bathdif**

R5 SC13 DIFF USING BARS OR SEATS

DISPLAY INSTRUCTIONS:

If SC9 = 1, 2, 3, or 4 (used bath grab bars every time, most times, sometimes, or rarely) or SC10 = 1, 2, 3, or 4 (used bath seat every time, most times, sometimes, or rarely), display “{when {you/SP} used {your/{his/her}}}”.

If SC9 = 1, 2, 3, or 4 and SC10 = 1, 2, 3, or 4, display “grab bars or shower or tub seat”.

Else if SC9 = 1, 2, 3, or 4, display “grab bars”.

Else if SC10 = 1, 2, 3, or 4, display “shower or tub seat”.

If SHOWERING flag = 1 (yes), display “showering”.

If TAKINGBATHS flag = 1 (yes), display “taking a bath”.

If WASHINGUP flag = 1 (yes), display “washing up”.

If SC9 = 1, 2, 3, or 4, display “A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.”

If SC10 = 1, 2, 3, or 4, display “A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.”

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used {your/{his/her}}}{grab bars/shower or tub seat/grab bars or shower or tub seat} how much difficulty did {you/{he/she}} have {showering/ taking a bath/ washing up} by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

IF NEEDED: {A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.} {A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.}

CODES

- | | |
|---|------------|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

SC14

sc5bathyrgo

R5 SC14 BATHE MRE OFT THN YR AGO

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “shower”.

If TAKINGBATHS flag = 1 (yes), display “take baths”.

If WASHINGUP flag = 1 (yes), display “wash up”.

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now {shower/ take baths/ wash up} more often, less often, or about the same?

CODES

- | | |
|---|------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

BOX SC15

BOXSC15

NOT ON FILE

If SC11 = 2 (no help cleaning up) and SC13 = 1 (no difficulty cleaning up), go to SC16PRE.

Otherwise go to SC15.

SC15

sc5bathwout

R5 SC15 EVER GO WITHOUT WASHING

DISPLAY INSTRUCTIONS:

If SC12 = 4 (never cleaned up by self), display “no one was there to help”.

Otherwise, display “it was too difficult to do that by {yourself/{himself/herself}}”.

If SHOWERING flag = 1 (yes), display “showering”.

If TAKINGBATHS flag = 1 (yes), display “taking a bath”.

If WASHINGUP flag = 1 (yes), display “washing up”.

QUESTION TEXT:

In the last month, did {you/SP} ever go without {showering/ taking a bath/ washing up} because {no one was there to help /it was too difficult to do that by {yourself/{himself/herself}}}?

CODES

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

SC16PRE

SC16PRE

NOT ON FILE

QUESTION TEXT:

Now I have a few questions about using the toilet.

IF NEEDED: These questions may seem a bit personal, but they are very important for research on aging and health trends.

PRESS 1 AND ENTER TO CONTINUE

SC16

sc5usvartoi1

R5 SC16 SP USED PORTABLE COMMODORE

sc5usvartoi2

R5 SC16 SP USED PADS UNDERGMT

sc5usvartoi3

R5 SC16 USED GRABBAR FR TOILET

sc5usvartoi4

R5 SC16 USED RAISED TOILET SEAT

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for SC16 [a-d]

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

If at SC16a, do not display question text in brackets.
Otherwise, display question text in brackets.

For SC16a, if IS3 = 1 (SP is male), display “, portable urinal”.
For SC16d, if IS3 = 1 (SP is male), display “, portable urinals”.

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

If DECEASED flag = 1 (YES), display “of {his/her} life” and “did SP ever use”.
Otherwise, display “{have you/has SP} ever used”.

QUESTION TEXT:

{[}In the last month {of {his/her} life}, {[have you/has SP} ever used}/{did SP ever use}{]}

{variable text [a-d]}

RESPONSE [1] a. a portable commode { portable urinal,} or bedpan?

RESPONSE [2] b. disposable pads or undergarments to help prevent accidentally wetting or soiling
{your/{his/her}} clothes?

{RESPONSE [3] c. grab bars around the toilet?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or part of a frame that goes over the toilet. Do not include towel racks.}

{RESPONSE [4] d. a raised toilet or raised toilet seat?

IF NEEDED: This includes a toilet seat that is elevated higher than usual, either because the toilet or the seat is raised, or a seat with arms that fits over the toilet. Do not include portable commodes {portable urinals,} or bedpans.}

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

SC17

sc5toilhl

R5 SC17 ANYON HLP YOU USE TOILET

DISPLAY INSTRUCTIONS:

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

If DECEASED flag = 1 (YES), display "of {his/her} life" and "lived".

Otherwise, display "lives".

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} use the toilet?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} {lives/lived}}, or someone paid to help {you/{him/her}}.

CODES

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

BOX SC17A

BOX SC171

NOT ON FILE

If SC17 = 1 (YES), go to SC17A.

Else if DECEASED flag = 1 (YES), go to SC21PRE.

Otherwise, go to SC19.

SC17A

op5toilhl

R5 SC17A HELPS SP WITH TOILETING

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ENTRY with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in underlined text

QUESTION TEXT:

Who helped {you/SP} use the toilet?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC17b. [What is (his/her) first name?] CONFIRM SPELLING

SC17c. [What is (his/her) last name?] CONFIRM SPELLING

SC17d. [What is (his/her) relationship to {you/SP}?] [PRESS F1 FOR HELP SCREEN]

CODES

- | | |
|----|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |

91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX SC18	BOX SC18	NOT ON FILE
<p>If DECEASED flag = 1 (YES), go to SC21PRE</p> <p>Otherwise, go to SC18.</p>		

SC18	sc5toiloft	R5 SC18 OFTEN USE TOILET BY SELF
------	------------	----------------------------------

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP} used the toilet, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	SC20
	REFUSED	SC20
	DON'T KNOW	SC20

SC19	sc5toildif	R5 SC19 DIFFICUTY WITH GRAB BARS
------	------------	----------------------------------

DISPLAY INSTRUCTIONS:

If SC16c = 1 (used toilet grab bars) or SC16d = 1 (used raised toilet), display "when {you/SP} used the {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat},".

If SC16c = 1 (used toilet grab bars) and SC16d = 1 (used raised toilet), display "grab bars or raised toilet or raised toilet seat"

Else if SC16c = 1 (used toilet grab bars), display "grab bars".

Else if SC16d = 1 (used raised toilet), display "raised toilet or raised toilet seat".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used the} {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat}, } how much difficulty did {you/{he/she}} have using the toilet by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

1	NONE
---	------

- 2 A LITTLE
- 3 SOME
- 4 A LOT
- REFUSED
- DON'T KNOW

BOX SC20
BOXSC20

NOT ON FILE

If SC17 = 2 (no help) and SC19 = 1 (no difficulty), go to SC21PRE.

Otherwise go to SC20.

SC20
sc5toilwout

R5 SC20 ACCIDENT WET SOIL CLTHES

DISPLAY INSTRUCTIONS:

If SC18 = 4 (never used toilet by self), display “no one was there to help {you/{him/her}} get to or use the toilet”.

Otherwise, display “it was too difficult to get to or use the toilet by {yourself/{himself/herself}}”.

QUESTION TEXT:

In the last month, did {you/SP} ever accidentally wet or soil {your/{his/her}} clothes because {no one was there to help {you/{him/her}} get to or use the toilet/it was too difficult to get to or use the toilet by {yourself/{himself/herself}}?

CODES

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

SC21PRE
SC21PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “a person”.

Otherwise, display “{you/SP}”.

QUESTION TEXT:

The next few questions are about getting dressed. By getting dressed we mean changing out of the clothes {{you/SP}/a person} slept in.

PRESS 1 AND ENTER TO CONTINUE

SC21
sc5dresoft

R5 SC21 OFTEN YOU GET DRESSED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display “of {his/her} life”.

QUESTION TEXT:

SHOW CARD SC4

In the last month {of {his/her} life}, did {you/SP} get dressed every day, most days, some days, rarely, or never?

CODES

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

BOX SC22**BOX SC22****NOT ON FILE**

If SC21=1, 2, 3 or 4, go to SC22.

Else if DECEASED flag = 1 (YES), go to Section DS – Duration of Self Care Activities

Otherwise, go to Box SC27.

SC22**sc5dresdev****R5 SC22 USE SPECL ITEMS TO DRESS****DISPLAY INSTRUCTIONS:**

If DECEASED flag = 1 (YES), display “of {his/her} life”.

QUESTION TEXT:

In the last month {of {his/her} life}, did {you/SP} use any special items to get dressed, such as a button hook, reacher or grabber, or clothes that are designed to get on and off easily?

CODES

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

SC23**sc5dreshlp****R5 SC23 ANYONE HELP GET DRESSED****DISPLAY INSTRUCTIONS:**

If IS3 = 2 (SP is female), display “or bra”.

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

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

If DECEASED flag = 1 (YES), display “of {his/her} life” and “lived”.

Otherwise, display “lives”.

QUESTION TEXT:

In the last month {of {his/her} life}, did anyone ever help {you/SP} get dressed, for instance, by getting clothing over {your/{his/her}} head, helping with clothing behind {your/{his/her}} back like a belt {or bra}, or helping {you/{him/her}} put on socks or shoes?

IF NEEDED: This includes family, friends, {a staff person from the place where {{you live/{he/she} {lives/lived}},} or someone paid to help {you/{him/her}}.

CODES

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

BOX SC23A**BOX SC23A****NOT ON FILE**

If SC23 = 1 (YES), go to SC23A.

Else if DECEASED flag = 1 (YES), go to Section DS – Duration of Self Care Activities.

Otherwise, go to SC25.

SC23A**op5dreshlp****R5 SC23A HELPS SP WITH DRESSING****op5relatnshp****R5 RELASHIP TO SP UPDATE AND NEW****DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

Display "first" and "last" in bold underlined text.

QUESTION TEXT:

Who helped {you/SP} get dressed?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON.

SC23b. [What is (his/her) first name?] CONFIRM SPELLING

SC23c. [What is (his/her) last name?] CONFIRM SPELLING

SC23d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|-----------------|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |

21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX SC24

BOX SC24

NOT ON FILE

If DECEASED flag = 1 (YES), go to Section SC - Self-Care Activities.

Otherwise, go to SC24.

SC24

sc5dresslf

R5 SC24 OFTEN YOU DRESS YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP} got dressed, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	SC26
	REFUSED	SC26
	DON'T KNOW	SC26

SC25

sc5dresdif

R5 SC25 DIF WHN US SP ITMS YRSLF

DISPLAY INSTRUCTIONS:

If SC22 = 1 (yes, used special items), display “when {you/SP} used special items to help {you/{him/her}} get dressed,”.

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used special items to help {you/{him/her}} get dressed, } how much difficulty did {you/{he/she}} have getting dressed by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

- | | |
|---|------------|
| 1 | NONE |
| 2 | A LITTLE |
| 3 | SOME |
| 4 | A LOT |
| | REFUSED |
| | DON'T KNOW |

SC26**sc5dresyrgo**

R5 SC26 HOW OFTN YOU GET DRESSED

DISPLAY INSTRUCTIONS:

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now get dressed more often, less often, or about the same?

CODES

- | | |
|---|------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | SAME |
| | REFUSED |
| | DON'T KNOW |

BOX SC27**BOXSC27**

NOT ON FILE

If SC23 = 2 (did not get help) and SC25 = 1 (no difficulty), go to Section DS – Duration of Self Care Accommodations.

Otherwise go to SC27.

SC27**sc5dreswout**

R5 SC27 GO WITHOUT GTTNG DRESSED

DISPLAY INSTRUCTIONS:

If SC24 = 4 (never dressed by self), display “there was no one there to help”.

Otherwise, display “it was too difficult to dress by {yourself/{himself/herself}}”.

QUESTION TEXT:

In the last month, did {you/SP} ever go without getting dressed because {there was no one there to help

/it was too difficult to dress by {yourself/{himself/herself}}?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section DS – Duration of Self Care Accommodations

Derived Variables from Items in SC Section

sc5deatdevi	R5 D USES DEVICES WHILE EATING
sc5deathelp	R5 D HAS HELP EATING
sc5deatsfdf	R5 D DIFF EATING BY SELF WO HELP
sc5dbathdevi	R5 D USES DEVICES WHILE BATHING
sc5dbathhelp	R5 D HAS HELP WHILE BATHING
sc5dbathsfdf	R5 D DIFF BATHING SELF NO HELP
sc5dtoildevi	R5 D USES DEVICES WHILE TOILETING
sc5dtoilhelp	R5 D HAS HELP WHILE TOILETING
sc5dtoilsfdf	R5 D DIFF LEVEL TOILETING SELF
sc5dresdevi	R5 D USES DEVICES WHILE DRESSING
sc5dreshelp	R5 D HAS HELP WHILE DRESSING
sc5dressfdf	R5 D DIFF LEVEL DRESSING SELF

Flag variables set in SC Section

fl5showering	R5 F SC SP USES SHOWER
fl5takingbth	R5 F SC SP TAKES BATHS
fl5washingup	R5 F SC SP WASHES OTHER WAY

NHATS Round 5

Section DS [DURATION OF SELF-CARE ACCOMMODATIONS]

Sequence: 23

BOX DS1

BOX DS1

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and [SC3, SC11, SC17, and SC23 <> 1 (YES)], go to DS1.
Else if NEWSAMPLE flag = 1 (YES), go to DS2.

If DECEASED flag = 1 (YES) and (LAST INT Status = 64 or 61), go to Section PA – Participation.
Else if (LAST INT Status=64), go to Section MC – Medical Care Activities.

Else if DECEASED flag=1 (YES) and [Combined MONTH OF DEATH and YEAR OF DEATH = Combined LAST INT interview month and LAST INT interview year or the month after the LAST INT interview month and LAST INT interview year (LAST INT interview month+1) or Month of Death=DK or RF], go to Section PA – Participation.

Else if [LAST INT SC3, SC11, SC17, and SC23=2 (NO), RF, or DK] and [CURRENT INT SC3, SC11, SC17, or SC23 = 1 (YES), go to DS3C.

Else if [LAST INT SC3, SC11, SC17, or SC23 = 1 (YES)] and [CURRENT INT SC3, SC11, SC17, and SC23 = 2 (NO), RF, or DK], go to DS3D.

Else if [LAST INT SC3, SC11, SC17, or SC23 = 1 (YES)] and [CURRENT INT SC3, SC11, SC17 or SC23 = 1 (YES), go to DS3E.

Otherwise, go to DS1.

DS1

ds5gethlpeat

R5 DS1 GET HELP WITH EATING, ETC

DISPLAY INSTRUCTIONS:

If NEWSAMPLE flag = 1 (YES), display "In the last year".

If DECEASED flag = 1 (YES), display "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR SP DIED}"

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

QUESTION TEXT:

{In the last year/{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR SP DIED}/Since {LAST INT MONTH AND YEAR}}}, did {you/SP} ever get help with eating, getting cleaned up, using the toilet, or getting dressed?

CODES

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

BOX DS2

BOX DS2

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to DS3B.
Otherwise, go to DS3C.

DS2

ds5hlpmrtnyr

R5 DS2 GET HELP FOR YEAR OR MORE

DISPLAY INTRUCTIONS:

If SC3=1 (YES), display “eating”.
 If SC11=1 (YES), display “getting cleaned up”
 If SC17=1 (YES), display “using the toilet”
 If SC23=1 (YES), display “getting dressed”

If more than one activity displayed, display “or” between each one.

QUESTION TEXT:

{Have you/Has SP} been getting help with {eating}{getting cleaned up}{using the toilet}{getting dressed}
 for a year or more?

IF NEEDED: {Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	
2	NO, LESS THAN A YEAR	DS3B
	REFUSED	BOX DS4
	DON'T KNOW	BOX DS4

DS3A**ds5yrsgethlp**

R5 DS3A HOW MANY YRS GETTING HLP

DISPLAY INTRUCTIONS:

If only one activity displayed at DS2, display “that”.
 If more than one activity displayed at DS2, display “any of these activities”.

QUESTION TEXT:

About how many years {have you/has SP} been getting help with {that/any of these activities}?

ENTER NUMBER OF YEARS

ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE.

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 50
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.
 Soft range: 1-50.
 Go to BOX DS4.

DS3B**ds5mthgethlp**

R5 DS3B MNTH FIRST/LAST GET HELP

DISPLAY INTRUCTIONS:

If DS1 = 1 (help in last year), display “last” and “any of these activities”.
 If DS2 = 2 (help for less than a year) and only one activity displayed at DS2, display “first” and “that”.
 If DS2 = 2 (help for less than a year) and more than one activity displayed at DS2, display “first” and “any of

these activities".
Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER MONTH

ENTER NUMBER

Range	1 to 12
REFUSED	BOX DS4
DON'T KNOW	BOX DS4

DS3B1

ds5yrgethlp

R5 DS3B1 YEAR FIRST/LAST GET HELP

DISPLAY INSTRUCTIONS:

If DS1 = 1 (HELP IN LAST YEAR), display "last" and "any of these activities".
If DS2 = 2 (HELP FOR LESS THAN A YEAR) and only one activity displayed at DS2, display "first" and "that".
If DS2 = 2 (HELP FOR LESS THAN A YEAR) and more than one activity displayed at DS2, display "first" and "any of these activities".
Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

In what month and year since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: CURRENT YEAR-1 to CURRENT YEAR
Go to BOX DS4.

DS3C

ds5helpstmo

R5 DS3C MONTH SELF CARE HLP START

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DS1 = 1 (YES), do not display first sentence and display "any of these activities".

Otherwise, display question intro according to the following instructions:

If CURRENT INT SC3 = 1 (YES), display "eating".
If CURRENT INT SC11 = 1 (YES), display "getting cleaned up".
If CURRENT INT SC17 = 1 (YES), display "using the toilet".
If CURRENT INT SC23 = 1 (YES), display "getting dressed".

If more than one activity displayed, display "and" between each one and "any of these activities".

Otherwise, if only one activity displayed, display "that".

Display "first" in bold and underlined text.

QUESTION TEXT:

{In the last month {of {his/her} life}, {you/SP} got help with {eating} {getting cleaned up} {using the toilet} {getting dressed}, and in {LAST INT MONTH AND YEAR}, {you were/SP was} not getting this help.}

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

ENTER NUMBER

RANGE

1 to 12

REFUSED

BOX DS3D

DON'T KNOW

BOX DS3D

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DS3c=90, go to BOX DS4

DS3C1**ds5helpstyr**

R5 DS3C1 YEAR SELF CARE HELP STARTED

DISPLAY INSTRUCTIONS:

Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} first get help with {that/any of these activities}?

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR -1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

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

BOX DS3D**BOX DS3D**

NOT ON FILE

If [LAST INT SC3, SC11, SC17, and SC23 = 2 (NO), RF, or DK] and [CURRENT INT SC3, SC11, SC17, or SC23 = 1 (YES)] go to BOX DS4.

Otherwise, go to DS3D.

DS3D**ds5helpendmo**

R5 DS3D MONTH SELF CARE HELP ENDED

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life".

If DS1 = 1 (YES), do not display first sentence and display "any of these activities".

Otherwise display question intro according to the following instructions:

If LAST INT SC3 = 1 (YES), display "eating".

If LAST INT SC11 = 1 (YES), display "getting cleaned up".

If LAST INT SC17 = 1 (YES), display "using the toilet".

If LAST INT SC23 = 1 (YES), display "getting dressed".

If more than one activity displayed, display "and" between each one and "any of these activities".

Otherwise if only one activity displayed, display "that".

Display "last" in the phrase "last get help" in bold underlined text.

Display "MONTH" in underlined text.

QUESTION TEXT:

{In {LAST INT MONTH AND YEAR}, {you/SP} got help with {eating}{getting cleaned up}{using the toilet}
{getting dressed} and in the last month {of {his/her} life}, {you were/{he/she} was} not getting this help.}

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of
these activities}?

ENTER MONTH

IF LAST INTERVIEW INFORMATION IS INCORRECT, ENTER 90

ENTER NUMBER

Range

1 to 12

REFUSED

BOX DS4

DON'T KNOW

BOX DS4

PROGRAMMER INSTRUCTIONS:

Hard range: 1-12 and 90

If DS3D=90, go to BOX DS4

DS3D1

ds5helpendyr

R5 DS3D1 YEAR SELF CARE HELP ENDED

QUESTION TEXT:

In what month and year since {LAST INT MONTH AND YEAR}, did {you/SP} last get help with {that/any of
these activities}?

ENTER 4-DIGIT YEAR

ENTER YEAR

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Soft Range: CURRENT YEAR -1 to CURRENT YEAR

Hard Range: R1 INT YEAR to CURRENT YEAR

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

Go to BOX DS4.

DS3E

ds5nohelp

R5 DS3E NO SELF CARE HELP MTH PLUS

DISPLAY INSTRUCTIONS:

If DECEASED flag = 1 (YES), display "of {his/her} life" and "Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}".

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

Display question intro according to the following instructions:

If CURRENT INT SC3 = 1 (YES), display "eating".

If CURRENT INT SC11 = 1 (YES), display "getting cleaned up".

If CURRENT INT SC17 = 1 (YES), display "using the toilet".

If CURRENT INT SC23 = 1 (YES), display "getting dressed".

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

QUESTION TEXT:

In the last month {of {his/her} life}, {you/SP} got help with {eating} {getting cleaned up} {using the toilet} {getting dressed}, and in {LAST INT MONTH AND YEAR} {you were/{he/she} was} also getting help like this.

{Between {LAST INT MONTH AND YEAR} and {MONTH AND YEAR DIED}}/Since {LAST INT MONTH AND YEAR}}, did {you/{he/she}} go without help like this for a month or more?

CODES

1	YES	
2	NO	BOX DS4
90	LAST INTERVIEW INFORMATION INCORRECT	BOX DS4
	REFUSED	BOX DS4
	DON'T KNOW	BOX DS4

DS3F**ds5nohelpmos**

R5 DS3F MONTHS OF NO SELF CARE HELP

QUESTION TEXT:

For about how many months altogether did {you/SP} go without help like this?

ENTER NUMBER

Range	1 to 24
REFUSED	
DON'T KNOW	

BOX DS4**BOX DS4**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and {AGE ON PERSON ROSTER} = 65, go to Section MC - Medical Care Activities.

Else if NEWSAMPLE flag = 1 (YES) and DS3A = 997 (HELP ENTIRE LIFE), go to Section MC - Medical Care Activities.

Else if NEWSAMPLE flag = 1 (YES) and DS3A = 1-120 and {AGE ON PERSON ROSTER} - [YEARS FROM DS3A] <= 65, go to Section MC - Medical Care Activities.

Else if NEWSAMPLE flag = 1 (YES), go to DS4PRE.

Else if DECEASED flag = 1 (YES) and NOTALERT flag = 1 (YES), go to Section CL - Closing.

Else if DECEASED flag = 1 (YES), go to Section PA - Participation.

Otherwise, go to Section MC - Medical Care Activities.

DS4PRE**DS4PRE**

NOT ON FILE

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

PRESS 1 AND ENTER TO CONTINUE

DS4**ds5gthptrn65**

R5 DS4 GET HLP ARND TIME TRND 65

QUESTION TEXT:

{Were you/Was SP} getting help with eating, getting cleaned up, using the toilet, or getting dressed around the time when {you/he/she} turned 65?

CODES

1	YES	SECTION MC
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DS5**BOXDS5**

NOT ON FILE

If DS2 = 1 (help for year or more) or 2 (help for less than a year) or DS1 = 1 (help in last year), go to Section MC – Medical Care Activities.
Else, go to DS5.

DS5**ds5gthpsin65**

R5 DS5 GETTING HLP SNCE TRND 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

ds5dhlpvr	R5 D ANY SELF CARE HELP LAST YEAR
ds5dhlpst	R5 D MTHS SINCE SLF CARE HELP ST
ds5dhlpnd	R5 D MTHS SINCE SLF CARE HLP END
ds5dhlpvrs	R5 D YEARS HELP IN CARING 4 SELF
ds5dschlp	R5 D MONTHS OF SELF CARE HELP
ds5dschlpgr	R5 D SELF CARE HELP GROUP
ds5flag	R5 D SPECIAL CASES DS SECTION ROUTE

NHATS Round 5

Section MC [MEDICAL CARE ACTIVITIES]

Sequence: 24

MC1PRE

MC1PRE

NOT ON FILE

QUESTION TEXT:

The next few questions are about medicines that {you take/SP takes} that are prescribed by a doctor.

PRESS 1 AND ENTER TO CONTINUE

MC1

mc5meds

R5 MC1 IN MNTH TKE MEDS PRESCRBD

DISPLAY INSTRUCTIONS:

DISPLAY "in the last month" IN BOD UNDERLINED TEXT

QUESTION TEXT:

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

CODES

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

MC2

mc5medstrk

R5 MC2 KEEP TRCK PRESCRIBED MEDS

DISPLAY INSTRUCTIONS:

If PROXY flag is null, display "1a".

If PROXY flag = 1 (yes), display "1b".

DISPLAY "last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD {1a/1b}

Next we'd like to know more about how {you keep/SP keeps} track of {your/{his/her}} prescribed medicines. By keeping track, we mean making sure {you take/{he/she} takes} the correct amount at the right time.

Which answer best describes how {you/SP} did that in the last month? Did {you/{he/she}} always do this by {yourself/{himself/herself}}, always do it together with someone else, did someone else always do it for {you/{him/her}}, or did it vary?

CODES

1	ALWAYS DID IT BY SELF	MC3
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	MC3
3	SOMEONE ELSE ALWAYS DID IT	MC5A
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	MC6
	REFUSED	MC7
	DON'T KNOW	MC7

MC2A**mc5medsslif**

R5 MC2A LAST MNTH KEEP TRACK SLF

DISPLAY INSTRUCTIONS:

DISPLAY “by {yourself/{himself/herself}}” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} ever keep track of {your/{his/her}} prescribed medicines by {yourself/{himself/herself}}?

CODES

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

MC3**mc5whrgtmed1**

R5 MC3 SP GOT MEDS LOCAL STORE

mc5whrgtmed3

R5 MC3 SP GOT MEDS BY MAIL

mc5whrgtmed3

R5 MC3 SP GOT MEDS HEC PRVD_HSP

mc5whrgtmed4

R5 MC3 SP GOT MEDS OTHR SPECIFY

DISPLAY INSTRUCTIONS:

Display “local” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Where did {you/SP} get the medicines that {you/{he/she}} took in the last month? Did {you/{he/she}} get any of these from a local store or pharmacy, by mail, or somewhere else?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

- | | | |
|----|-------------------------------|----------|
| 1 | LOCAL STORE OR PHARMACY | BOX MC3B |
| 2 | BY MAIL | BOX MC3B |
| 3 | HEALTH CARE PROVIDER/HOSPITAL | BOX MC3B |
| 91 | SOMEWHERE ELSE (SPECIFY) | |
| | REFUSED | MC4 |
| | DON'T KNOW | MC4 |

PROGRAMMERS INSTRUCTIONS:

If 92 (SOMEWHERE ELSE) is selected with any other response, go to MC3A.

MC3A**MC3A**

NOT ON FILE

QUESTION TEXT:

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

ENTER TEXT

Length

50

BOX MC3B**BOX MC3B**

NOT ON FILE

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

MC3B**mc5howpkupm1**

R5 MC3B SP PICKD UP MEDS BY SELF

mc5howpkupm2

R5 MC3B SP HAD MEDS DELIVERED

mc5howpkupm3

R5 MC3B SMEON ELSE PICKD UP MEDS

QUESTION TEXT:

Thinking of these prescribed medicines that {you/SP} took in the last month and got from a local store or pharmacy, did {you/{he/she}} pick them up {yourself/{himself/herself}}, have them delivered, or did someone else pick them up for {you/{him/her}}?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

- | | |
|---|-------------------------------|
| 1 | PICKED THEM UP BY SELF |
| 2 | HAD THEM DELIVERED |
| 3 | HAD SOMEONE ELSE PICK THEM UP |
| | REFUSED |
| | DON'T KNOW |

MC4**mc5medsrem**

R5 MC4 USE REMNDERS TO KEEP TRCK

DISPLAY INSTRUCTIONS:

Display "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MC2

In the last month, when {you/SP} kept track of {your/{his/her}} medicines, how often did {you/{he/she}} use reminders such as a pill organizer, box, dispenser, or calendar? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX MC5A**BOX MC5A**

NOT ON FILE

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

MC5A**op5medshlp**

R5 MC5A HELPS SP WITH MEDICINES

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag=1(YES) or RETIREMENT COMMUNITY flag=1(YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

If MC2 = 2 (always with someone else) display “with”. If

MC2 = 3 (someone else always did) display “for”.

If MC2 = 4 (varied), display “with or for”.

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

QUESTION TEXT:

In the last month, who kept track of {your/SP's} medicines {with/for/with or for} {you/{him/her}}?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MC5b. [What is (his/her) first name?] CONFIRM SPELLING

MC5c. [What is (his/her) last name?] CONFIRM SPELLING

MC5d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE

22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC5, set HELPEDTRACKMEDS flag = 1 (yes).

BOX MC6

BOX MC6

NOT ON FILE

If MC2 = 2 (always with someone else), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to MC8.

If MC2 = 3 (someone else always did), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC9.

If MC2 = 4 (varied) and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC7.

Otherwise go to MC6

MC6

mc5dmedsreas

R5 D MEDS REASN BY WITH OTHERS

DISPLAY INSTRUCTIONS:

If MC2 = 2 (always with someone else), display "with".

If MC2 = 3 (someone else always did), display "for".

If MC2 = 4 (varied) display, "with or for".

If MC2 = 5 (not done in last month), do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text in the response text. Display response codes in two side-by-side columns with "HEALTH AND FUNCTIONING" and "OTHER REASONS" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers

QUESTION TEXT:

{What is the reason someone else kept track of {your/SP's} medicines {with/for/with or for} {you/{him/her}}?}
Was that because of {your/{his/her}} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES

Code All That Apply

- 1 HEALTH OR FUNCTIONING INCLUDES: AGE,
MEMORY, VISION, HEALTH CONDITION/DISEASE
NAMES, SURGERY, UNABLE TO DRIVE
- 2 OTHER REASON INCLUDES: SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE
TO DO IT
REFUSED
DON'T KNOW

PROGRAMMERS INSTRUCTIONS:

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

BOX MC7

BOX MC7

NOT ON FILE

If MC2a = 1 (yes by self), go to MC7.
If MC2 = 2 (always with someone else) or (MC2a = 2 (didn't do by self), DK or RF), go to MC8.
If [MC2 = 3 (someone else always did) or 5 (not done in last month)] and HEALTHREASONHELPTRACKMEDS flag = 1 (yes), go to BOX MC9.
Otherwise go to MC10PRE.

MC7

mc5medsdif

R5 MC7 HOW DIFFIC KEEP TRACK MED

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}}" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have keeping track of {your/{his/her}} medicines by {yourself/{himself/herself}}? Would you say none, a little, some, or a lot?

CODES

- 1 NONE
- 2 A LITTLE
- 3 SOME
- 4 A LOT
- REFUSED
- DON'T KNOW

MC8

mc5medsyrgo

R5 MC8 COMPAR YR AGO HW KEPT TRCK

DISPLAY INSTRUCTIONS:

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} keep track of {your/{his/her}} medicines {yourself/himself/herself} more often, less often, or about the same?

CODES

- 1 MORE OFTEN
- 2 LESS OFTEN
- 3 SAME
- REFUSED
- DON'T KNOW

BOX MC9**BOX MC9**

NOT ON FILE

If [MC2 = 1 (always by self) or 4 (varied)] and [MC7 = 2 (a little difficulty) or MC7 = 3 (some difficulty) or MC7 = 4 (a lot of difficulty)], go to MC9.

If [MC2 = 2 (always with someone else) or MC2 = 3 (someone else always did) or MC2 = 4 (varied) or MC2 = 5 (not done in last month)] and [HEALTHREASONHELPTRACKMEDS flag = 1 (yes) or HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to MC9.

Otherwise, go to MC10PRE.

MC9**mc5medsmis**

R5 MC9 MAKE MISTAKE TAKING MEDS

DISPLAY INSTRUCTIONS:

If MC2 = 1 (always by self) or 5 (not done in last month) or MC2a = 1 (yes by self), display "it was too difficult to keep track of them by {yourself/{himself/herself}}"

Otherwise display "no one was there to help or keep track of them for {you/{him/her}}".

QUESTION TEXT:

In the last month, did {you/SP} ever make a mistake in taking {your/{his/her}} prescribed medicines because {it was too difficult to keep track of them by {yourself/{himself/herself}} /no one was there to help or keep track of them for {you/{him/her}}}?

IF NEEDED: That is, did {you/SP} take {your/{his/her}} medicines at the wrong time or in the wrong amount or miss taking them altogether?

CODES

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

MC10PRE**MC10PRE**

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

MC10**mc5havregdoc**

R5 MC10 YOU HAVE REGULAR DOCTOR

QUESTION TEXT:

Is there a doctor that {you think/SP thinks} of as {your/{his/her}} regular doctor, that is, a doctor {you usually go/{he/she} usually goes} to when {you are sick and need/{he/she} is sick and needs} advice about {your/{his/her}} health?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | MC12 |
| | REFUSED | MC12 |
| | DON'T KNOW | MC12 |

MC11	MC11	NOT ON FILE
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DISPLAY INSTRUCTIONS:

Display “FIRST” in bold underlined text.

QUESTION TEXT:

Please tell me the first and last name of {your/SP's} regular doctor.

ENTER FIRST NAME. CONFIRM SPELLING.

IF FIRST NAME UNKNOWN, ENTER DR.

ENTER TEXT

Length	25
REFUSED	

MC11A	MC11A	NOT ON FILE
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DISPLAY INSTRUCTIONS:

Display “LAST” in bold underlined text.

QUESTION TEXT:

[Please tell me the first and last name of {your/SP's} regular doctor.]

ENTER LAST NAME. CONFIRM SPELLING.

ENTER TEXT

Length	25
REFUSED	
DON'T KNOW	

MC12	mc5regdoclyr	R5 MC12 SEEN REG DOC WTHN LST YR
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DISPLAY INSTRUCTIONS:

If MC10 = 1 (yes, regular doctor), display “{your/{his/her}} regular doctor”

Otherwise, display “a doctor”

DISPLAY “last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

{Have you/Has SP} seen {{your/{his/her}} regular doctor/ a doctor} within the last year? That is, since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}.

CODES

1	YES	
2	NO	MC20PRE
	REFUSED	MC20PRE
	DON'T KNOW	MC20PRE

MC15	mc5hwgtregd1	R5 MC15 SP DROVE SELF TO REG DOC
	mc5hwgtregd2	R5 MC15 FAM PD HLP DRVE REG DOC

mc5hwgtregd3	R5 MC15 VAN PLC SP LIVE REG DOC
mc5hwgtregd4	R5 MC15 VAN FR DIS SENIOR REG DC
mc5hwgtregd5	R5 MC15 PUBLIC TRANSPORT REG DOC
mc5hwgtregd6	R5 MC15 SP TOOK TAXI TO REG DOC
mc5hwgtregd7	R5 MC 15 SP WALKED TO REG DOC
mc5hwgtregd8	R5 MC15 REG DOC WAS HOME VISIT
mc5hwgtregd9	R5 MC15 OTHR SPECIFY REG DOC

DISPLAY INSTRUCTIONS:

If DT1 = 1 (drives every day), 2 (drives most days), 3 (drives some days) or 4 (rarely) OR DROVEINLASTYEAR flag = 1 (yes), display “drive,” and response 1.

If FACILITY flag = 1 (yes), display “use a service provided by the place where {you live/{he/she} lives},”.

If FACILITY flag = 1 (yes) or RETIREMENT COMMUNITY flag = 1 (yes), display response 3 and for response 4, “not provided by the place SP lives”.

If MC10 = 1 (yes, regular doctor), display “{your/{his/her}} regular doctor”.

Otherwise, display “the doctor”.

DISPLAY “In the last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOWCARD MC3

In the last year, how did {you/SP} get to {{{your/{his/her}} regular doctor/the doctor}? Did {you/{he/she}} {drive,} get a ride from a family member or friend, {use a service provided by the place where {you live/{he/she} lives},} or what?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	{DROVE}	MC16
2	GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP	MC16
3	{USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LIVES}	MC16
4	USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {(NOT PROVIDED BY THE PLACE SP LIVES)}	MC16
5	TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM)	MC16
6	TOOK A TAXI	MC16
7	WALKED	MC16
8	HOME VISIT	MC16
91	OTHER (SPECIFY)	
	REFUSED	MC16
	DON'T KNOW	MC16

MC15A

MC15A

NOT ON FILE

QUESTION TEXT:

SPECIFY HOW GOT TO DOCTOR

ENTER TEXT

Length

50

MC16

mc5ansitindr

R5 MC16 ANONE SIT IN W YOU AT DR

DISPLAY INSTRUCTIONS:

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

MC10 = 1 (yes, regular doctor), display “regular”.

DISPLAY "last year" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last year, did anyone sit in with {you/SP} and {your/{his/her}} {regular} doctor during {your/{his/her}} visits?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

CODES

1	YES	
2	NO	MC20PRE
	REFUSED	MC20PRE
	DON'T KNOW	MC20PRE

MC17A

op5dochlp

R5 MC17A SITS IN W SP AT DRS

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

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

QUESTION TEXT:

Who was that (who sat in with {you/SP} and {your/{his/her}} doctor)?

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

MC17b. [What is (his/her) first name?] CONFIRM SPELLING

MC17c. [What is (his/her) last name?] CONFIRM SPELLING

MC17d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED
38	CO-WORKER
39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC17 set SATINWITHDOCTOR flag = 1 (yes).

MC17B

MC17B

NOT ON FILE

QUESTION TEXT:

PRESS 1 AND ENTER TO CONTINUE

BOX MC18**BOX MC18****NOT ON FILE**

If only one person selected/added at MC17, set SATINWITHDOCTORMOST FLAG=1 (YES) for person selected and go to MC19.
Otherwise, go to MC18

MC18**op5dochlpms**

R5 MC18 SITS MOST IF MORE THAN 1

DISPLAY INSTRUCTIONS:

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Display only those roster items selected at MC17. Do not allow new entries. Allow only one roster item to be selected.

If MC10 = 1 (yes, regular doctor), display "regular".

DISPLAY "most often" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

Who sat in with {you/SP} and {your/{his/her}} {regular} doctor most often?

SELECT ONE

PROGRAMMERS INSTRUCTIONS:

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

MC19**mc5tpersevr1**

R5 MC19 HLP UPTO EXAM TBL DRESS

mc5tpersevr2

R5 MC19 REMND SP OF QSTNS FR DOC

mc5tpersevr3

R5 MC19 ASK TELL DOC THINGS 4 SP

mc5tpersevr4

R5 MC19 HLP SP UNDERSTAND DOC

DISPLAY INSTRUCTIONS:

If at MC19b, do not display question text in brackets.
Otherwise, display question text in brackets.

USE "SAME QUESTION STEM" DISPLAY. DISPLAY "last year" IN BOLD UNDERLINED TEXT

If PROXY flag = 1 (YES) and SATINWITHDOCTORMOST flag = 1 (YES) for ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES), display "you".

Else, if SATINWITHDOCTOR MOST flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SPLIVES, display "the person from the place where {you live/SP lives}".
Otherwise, display "FIRST NAME LAST NAME" OF PERSON with SATINWITHDOCTORMOST flag = 1 (YES)

QUESTION TEXT:

[{}During those visits in the last year, did {you/FIRST NAME LAST NAME OF PERSON WITH SATINWITHDOCTORMOST flag = 1 (YES)/the person from the place where {you live/SP lives}} ever {}]

[variable text {b-e}]

RESPONSE 2 [b] help {you/SP} with getting on the exam table, dressing, and undressing?

RESPONSE 3 [c] remind {you / SP} about things {you/{he/she}} wanted to ask or tell the doctor?

RESPONSE 4 [d] ask or tell the doctor things for {you/SP}?

RESPONSE 5 [e] help {you/SP} understand what the doctor was saying?

CODES

1

YES

2 NO
REFUSED
DON'T KNOW

MC20PRE

MC2OPRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

MC20

mc5chgin spln

R5 MC20 CHGD ADD INS OR DRUG PLN

DISPLAY INSTRUCTIONS:

Display "last year" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last year, that is since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} changed {your/his/her} Medicare supplemental plan, {your/his/her} prescription drug plan, or decided to leave a managed care plan?

CODES

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

MC21

mc5anhlpwdec

R5 MC21 ANYONE HELP W DECISION

QUESTION TEXT:

Did anyone help {you/SP} with that decision or make that decision for {you/him/her}?

CODES

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

MC22A

op5insurhlp

R5 MC22A HELPS WITH INSUR DECIS

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES/DIED on the PERSON ROSTER.

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

QUESTION TEXT:

Who 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

- | | |
|----|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |
| 39 | MINISTER, PRIEST, OR OTHER CLERGY |
| 40 | PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST |

- 91 OTHER RELATIVE
- 92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC22 set HELPEDMAKEINSURANCEDECITIONS flag = 1 (yes).

Go to Section PA- Participation.

Derived Variables from Items in the MC Section	
mc5dmedssfdf	R5 D DIFF LEVEL MEDICATIONS SELF
mc5dmedsreas	R5 D MEDS REASN BY WITH OTHERS

NHATS Round 5

Section PA [PARTICIPATION]

Sequence: 25

BOX PA1PRE

BOX PA1PRE

NOT ON FILE

If DECEASED flag = 1 (YES), go to BOX PA25.
Otherwise, go to PA1PRE.

PA1PRE

PA1PRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

PA1

pa5vistfrfam

R5 PA1 EVER VISIT FRIENDS FAMILY

DISPLAY INSTRUCTIONS:

Display PA1, PA2, PA3, and PA4 on the same screen.
Display "not" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever visit in person with friends or family not living with {you/him/her},
either at {your/his/her} home or theirs ?

CODES

1	YES	
2	NO	
	REFUSED	PA5
	DON'T KNOW	PA5

PA2

pa5hlkepfvst

R5 PA2 HLTH KP FR VIST FAM FRNDS

DISPLAY INSTRUCTIONS:

Display "not" in underlined text.

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (visiting
with friends and family not living with {you/him/her})?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX PA3

BOX PA3

NOT ON FILE

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

PA3

pa5trkpfrvis

R5 PA3 TRAN PRB KP FR VST FRNDS

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (visiting in person with friends and family not living with {you/him/her})?

CODES

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

PA4

pa5impvstfam

R5 PA4 IMPRTNT VISIT FRNDS FAMILY

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

pa5attrelsr

R5 PA5 EVER ATTEND RELIG SERVICES

DISPLAY INSTRUCTIONS:

Display PA4, PA6, PA7, and PA8 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever attend religious services?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA9 |
| | DON'T KNOW | PA9 |

PA6

pa5htkfrlslr

R5 PA6 HEALTH KEEP FRM RELI SERV

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (attending religious services)?

CODES

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

BOX PA7**BOX PA7**

NOT ON FILE

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

PA7**pa5trprrelsr**

R5 PA7 TRAN PRO KEEP FM RELG SER

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (attending religious services)?

CODES

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

PA8**pa5imprelser**

R5 PA8 HW IMPORT ARE RELIG SERV

QUESTION TEXT:

How important is it to {you/SP} to attend religious services? Would you say very important, somewhat important, or not so important?

CODES

- | | |
|---|--------------------|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

PA9**pa5clbmtgrac**

R5 PA9 CLUB MEETINGS GRP ACTIVES

DISPLAY INSTRUCTIONS:

Display PA9, PA10, PA11, and PA12 on the same screen.
If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display "besides religious services,".

QUESTION TEXT:

In the last month, {besides religious services,} did {you/SP} ever participate in clubs, classes, or other organized activities?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA13 |
| | DON'T KNOW | PA13 |

PA10	pa5hlkpfrclb	R5 PA10 HELTH KEP FRM CLB MTINGS
-------------	---------------------	----------------------------------

QUESTION TEXT:

In the last month, did {you/SP's} health or functioning ever keep {you/him/her} from doing this (participating in clubs, classes, or other organized activities)?

CODES

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

BOX PA11	BOX PA11	NOT ON FILE
-----------------	-----------------	-------------

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

PA11	pa5trprkpfgr	R5 PA11 TRANS PROB KEEP FM GROPS
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QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (participating in clubs, classes, or other organized activities)?

CODES

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

PA12	pa5imparclub	R5 PA12 IMPORT PARTIC CLUBS GRUP
-------------	---------------------	----------------------------------

DISPLAY INSTRUCTIONS:

If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display "other than religious services"

QUESTION TEXT:

How important is it to {you/SP} to participate in clubs, classes, or other organized activities {other than religious services}? Would you say very important, somewhat important, or not so important?

CODES

- | | |
|---|--------------------|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

PA13	pa5outfrenjy	R5 PA13 EVER GO OUT FOR ENJOYMNT
-------------	---------------------	----------------------------------

DISPLAY INSTRUCTIONS:

Display PA13, PA14, PA15, and PA16 on the same screen.

If PA9 = 1 (PARTICIPATES IN GROUP ACTIVITIES), display “besides participating in club or group activities”.

QUESTION TEXT:

In the last month, {besides participating in club or group activities,} did {you/SP} ever go out for enjoyment? This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES

1	YES	
2	NO	
	REFUSED	PA17
	DON'T KNOW	PA17

PA14

pa5hlkpgoenj

R5 PA14 HLTH KP GO OUT ENJOY

QUESTION TEXT:

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

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX PA15

BOX PA15

NOT ON FILE

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

PA15

pa5trprgoout

R5 PA15 TRANSPORB KEEP FM GO OUT

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (going out for enjoyment)?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PA16

pa5impouteny

R5 PA16 IMPORT GO OUT FOR ENJOYT

QUESTION TEXT:

How important is it to {you/SP} that {you go/{he/she} goes} out for enjoyment? Would you say very

important, somewhat important, or not so important?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES

- | | |
|---|--------------------|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON'T KNOW |

PA17

pa5workfrpay

R5 PA17 EVER WORK FOR PAY

DISPLAY INSTRUCTIONS:

Display PA17 and PA18 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever work for pay or in a business {you own/{he/she} owns}?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA19 |
| | DON'T KNOW | PA19 |

PA18

pa5hlkpfrwrk

R5 PA18 HEALTH KEEP YOU FRM WORK

DISPLAY INSTRUCTIONS:

If PA17 = 1 (YES), display “did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (working for pay)”.

If PA17 = 2 (NO), display “was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (work for pay)”.

QUESTION TEXT:

In the last month, {did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (working for pay)}/was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (work for pay)}?

CODES

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

PA19

pa5voltwork

R5 PA19 EVER DO VOLUNTEER WORK

DISPLAY INSTRUCTIONS:

Display PA19 and PA20 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever do volunteer work?

CODES

1	YES	
2	NO	
	REFUSED	PA21
	DON'T KNOW	PA21

PA20**pa5hlkpfrvol**

R5 PA20 HELTH KEEP FM VOLUNTRING

DISPLAY INSTRUCTIONS:

If PA19 = 1 (YES), display “did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (volunteer work)”.

If PA19 = 2 (NO), display “was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (volunteer work)”.

QUESTION TEXT:

In the last month, {did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (volunteer work)/was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (volunteer work)}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PA21**pa5prcranoth**

R5 PA21 PROVIDE CARE ANOTHER PERS

DISPLAY INSTRUCTIONS:

If PA17 = 1 (WORKED FOR PAY) or PA19 = 1 (VOLUNTEER WORK), display “besides as {a job/volunteer work/a job or volunteer work}”.

Otherwise, use null display.

If PA17 = 1 (WORKED FOR PAY) and PA19 = 1 (VOLUNTEER WORK), display “a job or volunteer work”. Else if PA17 = 1 (WORKED FOR PAY), display “a job”.

Else if PA19 = 1 (VOLUNTEER WORK), display “volunteer work”.

QUESTION TEXT:

In the last month, {{besides as {a job/volunteer work/a job or volunteer work}}, did {you/SP} ever provide care for or look after an adult or child who cannot care for themselves?

CODES

1	YES	
2	NO	PA23
	REFUSED	PA23
	DON'T KNOW	PA23

PA22**op5spcaredfr**

R5 PA22D SP CARED FOR PERSON

op5relatnshp

R5 RELASHIP TO SP UPDATE AND NEW

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and

RELATIONSHIP TO SP fields.

Display "first" and "last" in underlined text.

QUESTION TEXT:

Who was that ({you/he/she} provided care for or looked after)?

PROBE: Anyone else?

SELECT ALL THAT APPLY

IF PERSON NAMED IS NOT ON THE ROSTER, PRESS CTRL/P TO ADD A PERSON

PA22b. [What is (his/her) first name?] CONFIRM SPELLING

PA22c. [What is (his/her) last name?] CONFIRM SPELLING

PA22d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|---|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPMOTHER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |
| 28 | DAUGHTER-IN-LAW'S SON/DAUGHTER |
| 29 | SON-IN-LAW'S SON/DAUGHTER |
| 30 | BOARDER/RENTER |
| 31 | PAID AIDE/HOUSEKEEPER/EMPLOYEE |
| 32 | ROOMMATE |
| 33 | EX-WIFE/EX-HUSBAND |
| 34 | BOYFRIEND/GIRLFRIEND |
| 35 | NEIGHBOR |
| 36 | FRIEND |
| 37 | SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED |
| 38 | CO-WORKER |

39	MINISTER, PRIEST, OR OTHER CLERGY
40	PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

If code 31 is selected, display hard error message "Relationship code 31 "Paid Aide/Housekeeper/Employee" cannot be selected here. Please confirm the relationship and select another relationship code."

If "SERVICE/SOMEONE FROM THE PLACE SP LIVES" is selected from the person roster, display hard error message "'SERVICE/SOMEONE FROM THE PLACE SP LIVES" cannot be selected here. Please confirm for whom SP provided care and select or add another person."

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

PA23	pa5evrgowalk	R5 PA23 EVER GO WALKING
-------------	---------------------	-------------------------

QUESTION TEXT:

In the last month, did {you/SP} ever go walking for exercise?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PA24	pa5vigoractv	R5 PA24 EVER VIGOROUS ACTIVITIES
-------------	---------------------	----------------------------------

QUESTION TEXT:

In the last month, did {you/SP} ever spend time on vigorous activities that increased {your/his/her} heart rate and made {you/him/her} breathe harder? This includes things like working out, swimming, running or biking, or playing a sport.

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX PA25	BOX PA25	NOT ONFILE
-----------------	-----------------	------------

If NEWSAMPLE flag = 1 (YES), go to PA25.
 Else if DECEASED flag = 1 (YES) and (LAST INT PA25A = 95 (NO ACTIVITY LISTED INCLUDING R1 61s AND 64s)), go to Section CL – Closing.
 Else if LAST INT PA25A = 95 (NO ACTIVITY LISTED), go to PA25.
 Otherwise, go to PA25A.

PA25	pa5dfavact	R5 D FAVORITE ACTIVITY AT R5
-------------	-------------------	------------------------------

DISPLAY INSTRUCTIONS:

Display PA25, PA25A, PA26 and PA26A on the same screen.

QUESTION TEXT:

Thinking about all the activities {you do/SP does} these days, what is {your/his/her} favorite activity? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

IF SP HAS NO FAVORITE ACTIVITY, ENTER 95.

ENTER TEXT

LENGTH

50

BOX PA25A**BOX PA25A**

NOT ON FILE

If PA25 = 95, go to Section RH – Rehabilitation.
Otherwise, go to PA26.

PA25a**pa5dofavact**

R5 PA25A GET TO DO FAV ACT LST YR

DISPLAY INSTRUCTIONS:

Display PA25, PA25A, PA26 and PA26A on the same screen.

If DECEASED flag = 1 (YES), display "Between the last interview in {LAST INT MONTH AND YEAR} and the time of {SP}'s death in {MONTH AND YEAR OF DEATH}, did {he/she} get to do this".

Otherwise, display, "Since the last interview in {LAST INT MONTH AND YEAR}, {have you/has SP} done {R1 INT PA25 TEXT}"

For "LAST INT PA25 TEXT" display text response from LAST INT PA25.

QUESTION TEXT:

During an earlier interview, we learned that {your/{SP}'s} favorite activity was { R1 INT PA25 TEXT }.

{Since the last interview in {LAST INT MONTH AND YEAR}, {have you/has SP} done { R1 INT PA25 TEXT }/Between the last interview in {LAST INT MONTH AND YEAR} and the time of {SP}'s death in {MONTH AND YEAR OF DEATH}, did {he/she} get to do this?}

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX PA26**BOX PA26**

NOT ON FILE

If DECEASED flag = 1 (YES), go to Section CL - Closing.
Otherwise, go to PA26.

PA26**pa5helmfvact**

R5 PA26 HEALTH LIMIT FAV ACTIVITY MONTH

DISPLAY INSTRUCTIONS:

Display PA25, PA25A, PA26 and PA26A on the same screen.

Display "month" in underlined text.

QUESTION TEXT:

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

CODES

1	YES	BOX PA27
2	NO	
	REFUSED	
	DON'T KNOW	

PA26A**pa5fvactlimyr**

R5 PA26A HEALTH LIMIT FAV ACTIVITY YEAR

DISPLAY INSTRUCTIONS:

Display PA25, PA25A, PA26 and PA26A on the same screen.

Display "year" in underlined text.

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX PA27**BOX PA27**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to Section RH – Rehabilitation.
Else if LAST INT PA25A = 95 (NO ACTIVITY LISTED), go to Section RH – Rehabilitation.
Otherwise, go to PA27.

PA27**pa5fvactstill**

R5 PA27 STILL FAVORITE ACTIVITY

DISPLAY INSTRUCTIONS:

Display PA27, PA27A, PA28 and PA28A on the same screen.

For "R1 INT PA25 TEXT" display text response from R1 INT PA25.

QUESTION TEXT:

Is {R1 INT PA25 TEXT} still your favorite activity or do you have a new one? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

CODES

1	STILL FAVORITE ACTIVITY	Section RH
2	HAS A NEW FAVORITE ACTIVITY	
95	NO FAVORITE ACTIVITY	Section RH
	REFUSED	Section RH
	DON'T KNOW	Section RH

PA27A**PA27A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display PA27, PA27A, PA28 and PA28A on the same screen.

QUESTION TEXT:

Thinking about all the activities {you do/SP does} these days, what is {your/his/her} favorite activity? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

ENTER FAVORITE ACTIVITY

ENTER TEXT

Length

50

PA28

pa5actnwlim

R5 PA28 HEALTH LIMIT NEW FAV ACTIVITY
MONTH

DISPLAY INSTRUCTIONS:

Display PA27, PA27A, PA28 and PA28A on the same screen.

Display “month” in underlined text.

QUESTION TEXT:

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

CODES

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

Section RH

PA28A

pa5actnwlim

R5 PA28A HEALTH LIMIT NEW FAV ACTIVITY
YEAR

DISPLAY INSTRUCTIONS:

Display PA27, PA27A, PA28 and PA28A on the same screen.

Display “year” in underlined text.

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section RH - Rehabilitation

Derived Variables From Items in PA Section

pa5dfavact

R5 D FAVORITE ACTIVITY AT R5

pa1dv2favact

R1 D VERSION 2 FAVORITE ACTIVITY

NHATS Round 5

Section RH [REHABILITATION]

Sequence: 26

RH1

rh5rehab

R5 RH1 RECEIVED REHAB IN LAST YEAR

DISPLAY INSTRUCTIONS:

Display “last year” in underlined text.

QUESTION TEXT:

Physical rehabilitation or “rehab” services can help you improve function and the ability to carry out daily activities. Services include physical therapy, occupational therapy, and speech therapy. Rehab can be received in different settings. For instance, while you are staying in the hospital, after a hospital stay in a nursing home or rehab facility, at a doctor’s or therapist’s office or clinic, or at home.

In the last year, {have you/has SP} received any rehab services?

CODES

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

BOX RH1

BOX RH1

NOT ON FILE

If RH1=1 (YES) go to RH1A.

Otherwise, go to Section SD – Smoking.

RH1A

rh5rehabmo

R5 RH1A MONTHS OF REHAB

DISPLAY INSTRUCTIONS:

Display “last year” in underlined text.

QUESTION TEXT:

In the last year, for about how many months altogether did {you/SP} receive rehab services?

Was it for less than one month, one to three months, four to five months, or six or more months?

CODES

- | | | |
|---|-------------------|-----|
| 1 | LESS THAN 1 MONTH | |
| 2 | 1 TO 3 MONTHS | RH2 |
| 3 | 4 TO 5 MONTHS | RH2 |
| 4 | 6 OR MORE MONTHS | RH2 |
| | REFUSED | RH2 |
| | DON'T KNOW | RH2 |

RH1B

rh5rehabweek

R5 RH1B WEEKS OF REHAB

DISPLAY INSTRUCTIONS:

Display “last year” in underlined text.

In the last year, for about how many weeks altogether did {you/SP} receive rehab services? Was it less than

one week, one to two weeks, or three to four weeks?

CODES

- | | |
|---|------------------|
| 1 | LESS THAN 1 WEEK |
| 2 | 1 TO 2 WEEKS |
| 3 | 3 TO 4 WEEKS |
| | REFUSED |
| | DON'T KNOW |

RH2

rh5rehaburg

R5 RH2 REHAB POST SURGERY

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

We are interested in the reasons {you/SP} received rehab in the last year.

Did {you/SP} receive rehab to help {you/him/her} recover following surgery?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | RH4 |
| | REFUSED | RH4 |
| | DON'T KNOW | RH4 |

RH3

rh5surgcond

R5 RH3 MAIN MED CONDITION FOR SURGERY

DISPLAY INSTRUCTIONS:

Display "main medical condition" in underlined text.

QUESTION TEXT:

SHOW CARD RH3/4

Please look at this card and tell me, what was the main medical condition for which {you/SP} had surgery?

CODES

- | | | |
|----|---|-----|
| 1 | A FRACTURE, SPRAIN, OR INJURY | RH5 |
| 2 | A HIP, KNEE OR OTHER JOINT REPLACEMENT | RH5 |
| 3 | ANOTHER MUSCULOSKELETAL CONDITION | RH5 |
| 4 | A STROKE OR TIA | RH5 |
| 5 | A HEART ATTACK | RH5 |
| 6 | ANOTHER HEART CONDITION OR VASCULAR DISEASE | RH5 |
| 7 | A BREATHING CONDITION | RH5 |
| 8 | A NEUROLOGICAL CONDITION LIKE MS OR PARKINSON'S | RH5 |
| 9 | CANCER | RH5 |
| 94 | ANOTHER CONDITION (SPECIFY) | RH5 |
| 95 | NO MEDICAL CONDITION (IF VOLUNTEERED) | RH5 |
| | REFUSED | RH5 |
| | DON'T KNOW | RH5 |

RH3B**RH3B**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER MEDICAL CONDITION TARGETED BY SURGERY

ENTER TEXT

LEGNTH

50

PROGRAMMER INSTRUCTIONS:

Go to RH5.

RH4**rh5rehabcond**

R5 RH4 MAIN MED CONDITION FOR REHAB

DISPLAY INSTRUCTIONS:

Display "main medical condition" in underlined text.

QUESTION TEXT:

SHOW CARD RH3/4

Please look at this card and tell me, what was the main medical condition for which {you/SP} received rehab in the last year?

CODES

1	A FRACTURE, SPRAIN, OR INJURY	RH5
2	A HIP, KNEE OR OTHER JOINT REPLACEMENT ANOTHER	RH5
3	MUSCULOSKELETAL CONDITION	RH5
4	A STROKE OR TIA	RH5
5	A HEART ATTACK	RH5
6	ANOTHER HEART CONDITION OR VASCULAR DISEASE	RH5
7	A BREATHING CONDITION	RH5
8	A NEUROLOGICAL CONDITION LIKE MS OR PARKINSON'S	RH5
9	CANCER	RH5
94	ANOTHER CONDITION (SPECIFY)	RH5
95	NO MEDICAL CONDITION (IF VOLUNTEERED)	RH5
	REFUSED	RH5
	DON'T KNOW	RH5

RH4B**RH4B**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER MEDICAL CONDITION

ENTER TEXT

LEGNTH

50

RH5**rh5funcback**

R5 RH5 IMPROVE FUNCTION IN BACK

rh5funchips

R5 RH5 IMPROVE FUNCTION IN HIPS

rh5funcnees

R5 RH5 IMPROVE FUNCTION IN KNEES

rh5funcfeet

R5 RH5 IMPROVE FUNCTION IN FEET

rh5funchands

R5 RH5 IMPROVE FUNCTION IN HANDS

rh5funcwrist	R5 RH5 IMPROVE FUNCTION IN WRIST
rh5funcshold	R5 RH5 IMPROVE FUNCTION IN SHOULDERS
rh5funchead	R5 RH5 IMPROVE FUNCTION IN HEAD
rh5funcneck	R5 RH5 IMPROVE FUNCTION IN NECK
rh5funcarms	R5 RH5 IMPROVE FUNCTION IN ARMS
rh5funclegs	R5 RH5 IMPROVE FUNCTION IN LEGS
rh5funcstom	R5 RH5 IMPROVE FUNCTION IN STOMACH
rh5funcmouth	R5 RH5 IMPROVE FUNCTION IN MOUTH
rh5funcheart	R5 RH5 IMPROVE FUNCTION IN HEART
rh5funclung	R5 RH5 IMPROVE FUNCTION IN LUNGS (From Other Specify)
rh5funcos	R5 RH5 IMPROVE FUNCTION OTHER SPECIFY
rh5funcnotsp	R5 RH5 IMPROVE FUNCTION NO SPECIFIC PLACE

Display “where” in underlined.

QUESTION TEXT:

SHOW CARD RH5

Next, please look at this card and tell me where {you were/SP was} trying to improve function?

PROBE: Anywhere else?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	BACK	RH6
2	HIP(S)	RH6
3	KNEES(S)	RH6
4	FEET	RH6
5	HAND(S)	RH6
6	WRIST(S)	RH6
7	SHOULDER(S)	RH6
8	HEAD	RH6
9	NECK	RH6
10	ARM(S)	RH6
11	LEG(S)	RH6
12	STOMACH	RH6
13	MOUTH OR THROAT	RH6
14	HEART	RH6
94	OTHER PLACES (SPECIFY)	RH6
95	NO SPECIFIC PLACE (IF VOLUNTEERED)	RH6
	REFUSED	RH6
	DON'T KNOW	RH6

RH5A

RH5A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER BODY STRUCTURES TARGETED BY THERAPY

ENTER TEXT

Length

50

RH6**rh5impchew**

R5 RH6 IMPROVE CHEWING SWALLOWING

rh5impspeak

R5 RH6 IMPROVE SPEAKING BEING UNDERSTOOD

rh5impspain

R5 RH6 IMPROVE PAIN LEVEL

rh5impbreath

R5 RH6 IMPROVE BREATHING

rh5impweak

R5 RH6 IMPROVE STRENGTH

rh5impmove

R5 RH6 IMPROVE MOVEMENT RANGE OF MOTION

rh5impenergy

R5 RH6 IMPROVE ENERGY LEVEL

rh5impbal

R5 RH6 IMPROVE BALANCE COORDINATION

rh5impfall

R5 RH6 IMPROVE PROBLEMS WITH FALLS

rh5impmemory

R5 RH6 IMPROVE MEMORY

rh5imphone

R5 RH6 IMPROVE NONE OF THESE PROBLEMS

DISPLAY INSTRUCTIONS:

Display "which of these problems" in underlined text.

QUESTION TEXT:

SHOW CARD RH6

Next, please look at this card and tell me which of these problems {were you/was SP} trying to improve?

PROBE: Any others?

SELECT ALL THAT APPLY

CODES

- | | |
|---|---|
| 1 | DIFFICULTY CHEWING OR SWALLOWING |
| 2 | DIFFICULTY SPEAKING OR BEING UNDERSTOOD |
| 3 | PAIN LEVEL |
| 4 | PROBLEM WITH BREATHING |
| 5 | PROBLEM WITH STRENGTH (MUSCLE WEAKNESS) |
| 6 | PROBLEM WITH MOVEMENT (RANGE OF MOTION) |
| 7 | LOW ENERGY LEVEL |
| 8 | PROBLEM WITH BALANCE OR COORIDNATION |

9 PROBLEM WITH FALLS
 10 PROBLEM WITH MEMORY
 95 NONE OF THESE PROBLEMS
 REFUSED
 DON'T KNOW

RH6B	rh5impbed	R5 RH6B IMPROVE GETTING OUT OF BED
	rh5impwalk	R5 RH6B IMPROVE WALKING INSIDE HOME
	rh5impleave	R5 RH6B IMPROVE LEAVING HOME OUTSIDE
	rh5impdistnc	R5 RH6B IMPROVE WALKING DISTANCES OUTSIDE
	rh5impclimb	R5 RH6B IMPROVE CLIMBING STAIRS
	rh5impdrive	R5 RH6B IMPROVE DRIVING
	rh5imptransp	R5 RH6B IMPROVE USING OTHER TRANSPORTATION
	rh5impnotths	R5 RH6B IMPROVE NONE OF THESE MOBIL ACT

DISPLAY INSTRUCTIONS:

Display "which of these" in underlined text.

QUESTION TEXT:

SHOW CARD RH6B

Sometimes rehab focuses on improving ways of moving or getting around. Please look at this card and tell me which of these {were you/was SP} trying to improve?

PROBE: Any others?

SELECT ALL THAT APPLY

CODES	Code All That Apply
1	GETTING OUT OF BED
2	WALKING AROUND INSIDE AT HOME
3	LEAVING HOME TO GO OUTSIDE
4	WALKING DISTANCES OUTSIDE (SEVERAL BLOCKS)
5	CLIMBING STAIRS
6	DRIVING
7	USING OTHER FORMS OF TRANSPORTATION
95	NONE OF THESE REFUSED DON'T KNOW

RH6C	rh5impssc	R5 RH6C IMPROVE CARING FOR SELF
	rh5imphh	R5 RH6C IMPROVE HOUSEHOLD ACTIVITIES
	rh5impcomp	R5 RH6C IMPROVE USING COMPUTER TABLET
	rh5impwork	R5 RH6C IMPROVE WORKING

rh5impcare
rh5impactiv
rh5impactnon

VOLUNTEERING
R5 RH6C IMPROVE PROVIDING CARE
R5 RH6C IMPROVE PARTICIPATING
ACTIVITIES
R5 RH6C IMPROVE NONE OF THESE
ACTIVITIES

DISPLAY INSTRUCTIONS:

Display “which of these” in underlined text.

QUESTION TEXT:

SHOW CARD RH6C

Sometimes rehab focuses on improving the ability to carry out specific activities. Please look at this card and tell me which of these activities {were you/was SP} trying to improve?

PROBE: Any others?

SELECT ALL THAT APPLY

CODES

- | | |
|----|--|
| 1 | CARING FOR SELF (WASHING UP, TOILETING, DRESSING, EATING) |
| 2 | HOUSEHOLD TASKS (SHOPPING FOR GROCERIES, PREPARING MEALS, DOING LAUNDRY) |
| 3 | USING A COMPUTER, LAPTOP OR TABLET |
| 4 | WORKING OR VOLUNTEERING |
| 5 | PROVIDING CARE TO SOMEONE ELSE |
| 6 | PARTICIPATING IN SOCIAL, RELIGIOUS, OR COMMUNITY ACTIVITIES |
| 95 | NONE OF THESE ACTIVITIES |
| | REFUSED |
| | DON'T KNOW |

RH6D	rh5devcane	R5 RH6D THERAPIST RECOMMEND CANE WALKER
	rh5devwhlch	R5 RH6D THERAPIST RECOMMEND WHEELCHR SCOOTER
	rh5devramp	R5 RH6D THERAPIST RECOMMEND ENTRANCE RAMP
	rh5devstair	R5 RH6D THERAPIST RECOMMEND STAIR LIFT GLIDE
	rh5devtub	R5 RH6D THERAPIST RECOMMEND GRABBAR TUB SEAT
	rh5devtoil	R5 RH6D THERAPIST RECOMMEND GRABBAR TOIL SEAT
	rh5deveat	R5 RH6D THERAPIST RECOMMEND ADAPTED UTENSIL
	rh5devdres	R5 RH6D THERAPIST RECOMMEND DRESSING DEV
	rh5devgrab	R5 RH6D THERAPIST RECOMMEND REACHER GRABBER
	rh5devcomp	R5 RH6D THERAPIST RECOMMEND COMPUTER DEVICE

rh5devcar

R5 RH6D THERAPIST RECOMMEND CAR
DEVICE

rh5devother

R5 RH6D THERAPIST RECOMMEND OTHER
CHANGES

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display.

If STRUCTURE flag = 2 (MULTI-UNIT) and HO2=1 (COMMON OR SHARED ENTRANCE), do not display RH6D3.

If STRUCTURE flag = 2 (MULTI-UNIT) or HO5=1 (ONE FLOOR), do not display RH6D4.

If HO11A= 2 (NO BATHTUB) and HO11B = 1 (YES, SHOWER STALL), display “shower” in RH6D5.

Else if HO11a = 1 (YES, BATHTUB) and HO11b = 2 (NO SHOWER STALL), display “tub area” in RH6D5.

Otherwise, display “shower or tub area” in RH6D5.

If DROVEINLASTYEAR flag <> 1 (YES), use null display in RH6D11.

Otherwise, display “or {drive/drives}” in RH6D11.

If at RH6D1, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{{}}Rehab therapists sometimes recommend devices or equipment to make activities easier, safer or so patients can do them on their own.

In the last year did any of {your/SP's} therapists recommend...{{}}

{variable text [a – l]}

RESPONSE [1] a. a cane or walker?

RESPONSE [2] b. a wheelchair or scooter?

RESPONSE [3] c. a ramp at the entrance to {your/SP's} home?

RESPONSE [4] d. a stair lift or stair glide?

RESPONSE [5] e. a grab bar or seat in the {{shower} or {tub area}}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks. A seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

RESPONSE [6] f. grab bars or a raised seat for the toilet?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

RESPONSE [7] g. adapted utensils to help with eating or cutting up food?

RESPONSE [8] h. special items to help with dressing such as buttonhooks or clothes that are designed to get on and off easily?

RESPONSE [9] i. a reacher or grabber to pick up things more easily?

RESPONSE [10] j. adaptive devices for a computer, laptop or tablet?

RESPONSE [11] k. adaptive devices for the car that {you ride /SP rides} in{ or {drive/drives}}?

RESPONSE [12] l. other changes to the home environment to help with daily tasks?

CODES

- | | |
|---|---------|
| 1 | YES |
| 2 | NO |
| | REFUSED |

DON'T KNOW

RH7	rh5place1	R5 RH7A RECEIVE REHAB OVERNIGHT HOSP NH REHAB
	rh5place2	R5 RH7B RECEIVE REHAB OUTPATIENT
	rh5place3	R5 RH7C RECEIVE REHAB HOME
	rh5place4	R5 RH7D RECEIVE REHAB SOMEWHERE ELSE

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

Display "where" in underlined text.

If at RH7A, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{ }Next, we are interested in where {you/SP} received rehab services in the last year.

In the last year, did {you/SP} receive rehab ... { }

RESPONSE [1] a. as an overnight patient in a hospital, nursing home, or rehab facility?

RESPONSE [2] b. at an outpatient center, clinic, or doctor's or therapist's office?

RESPONSE [3] c. at home?

RESPONSE [4] d. somewhere else?

CODES

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

BOX RH7E	BOX RH7E	NOT ON FILE
-----------------	-----------------	-------------

If RH7D=1 (YES) go to RH7E.
Otherwise, go to Box RH8.

RH7E	rh5places	R5 RH7E RECEIVE REHAB OTHER SPECIFY PLACE TYPE
-------------	------------------	---

QUESTION TEXT:

SPECIFY WHERE SP RECEIVED REHAB

ENTER TEXT

LENGTH

50

BOX RH8	BOX RH8	NOT ON FILE
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If more than one item at RH7A-D = 1 (YES), go to RH8.
Otherwise, go to RH9.

RH8	rh5placelast	R5 RH8 PLACE LAST RECEIVED REHAB
------------	---------------------	----------------------------------

DISPLAY INSTRUCTIONS:

Display “last” in underlined text.

If RH7A = 1 (YES), display “as an overnight patient in a hospital, nursing home, or rehab facility” and response option 1. OVERNIGHT PATIENT IN HOSPITAL, NURSING HOME, OR REHAB FACILITY.

If RH7B = 1 (YES), display “at an outpatient center, clinic, or doctor’s or therapists office” and response option 2. OUTPATIENT CENTER, CLINIC, DOCTOR’S OR THERAPISTS OFFICE.

If RH7C = 1 (YES), display “at home” and response option 3. HOME.

If RH7D = 1 (YES), display “at {TEXT FROM RH7E}” and response option 4. SOMEWHERE ELSE.

Display “or” between places received services.

QUESTION TEXT:

Which place did {you/SP} last receive these services? Was it {as an overnight patient in a hospital, nursing home, or rehab facility/at an outpatient center, clinic, or doctor’s or therapists office/at home/at {TEXT FROM RH7E}}?

CODES

- | | |
|---|--|
| 1 | OVERNIGHT PATIENT IN HOSPITAL, NURSING HOME, OR REHAB FACILITY |
| 2 | OUTPATIENT CENTER, CLINIC, DOCTOR’S OR THERAPISTS OFFICE |
| 3 | HOME |
| 4 | SOMEWHERE ELSE |
| | REFUSED |
| | DON’T KNOW |

RH9**rh5ability**

R5 RH9 FUNCTIONING IMPROVE IN REHAB

QUESTION TEXT:

While {you were/SP was} receiving rehab services in the last year, did {your/his/her} functioning and ability to do activities improve, get worse, or stay about the same?

CODES

- | | | |
|---|-------------------------------------|------|
| 1 | IMPROVED | |
| 2 | GOT WORSE | RH9B |
| 3 | STAYED ABOUT THE SAME | RH10 |
| 4 | VARIED/UP AND DOWN (IF VOLUNTEERED) | RH10 |
| | REFUSED | RH10 |
| | DON’T KNOW | RH10 |

RH9A**rh5abilimp**

R5 RH9A HOW MUCH FUNCTIONING IMPROVE IN REHAB

QUESTION TEXT:

Did it improve a lot, somewhat, or a little?

CODES

- | | |
|---|----------|
| 1 | A LOT |
| 2 | SOMEWHAT |
| 3 | A LITTLE |

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to RH10.

RH9B	rh5abilworse	R5 RH9A HOW MUCH FUNCTIONING WORSE IN REHAB
-------------	---------------------	--

QUESTION TEXT:

Did it get a lot worse, somewhat worse or a little worse?

CODES

1	A LOT
2	SOMEWHAT
3	A LITTLE
	REFUSED
	DON'T KNOW

RH10	rh5rehabnow	R5 RH10 STILL RECEIVING REHAB
-------------	--------------------	-------------------------------

DISPLAY INSTRUCTIONS:

Display "still" in underlined text.

QUESTION TEXT:

{Are you/Is SP} still receiving rehab services?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX RH11	BOX RH11	NOT ON FILE
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If RH10=2 (NO) go to RH11.
Otherwise, go to Section SD – Smoking.

RH11	rh5metgoals	R5 RH11 MET GOALS WHEN REHAB ENDED
-------------	--------------------	------------------------------------

QUESTION TEXT:

When {your/SP's} rehab services ended, had {you/SP} met all or most of {your/his/her} goals?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

RH12	rh5metinsur	R5 RH12 MET INSURANCE LIMIT WHEN REHAB ENDED
-------------	--------------------	---

QUESTION TEXT:

When {your/SP's} rehab services ended, had {you/SP} met the limit of {your/{his/her}} insurance coverage?

CODES

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

RH13**rh5abilnow**

R5 RH13 FUNCTIONING IMPROVE WHEN
REHAB ENDED

QUESTION TEXT:

Since {your/SP's} rehab services ended, have {your/his/her} functioning and ability to do activities improved, got worse, or stayed about the same?

CODES

- | | | |
|---|-------------------------------------|------------|
| 1 | IMPROVED | |
| 2 | GOT WORSE | RH15 |
| 3 | STAYED ABOUT THE SAME | Section SD |
| 4 | VARIED/UP AND DOWN (IF VOLUNTEERED) | Section SD |
| | REFUSED | Section SD |
| | DON'T KNOW | Section SD |

RH14**rh5nowimp**

R5 RH14 HOW MUCH FUNCTION IMPROVE
AFTER REHAB

QUESTION TEXT:

Did it improve a lot, somewhat, or a little?

CODES

- | | |
|---|------------|
| 1 | A LOT |
| 2 | SOMEWHAT |
| 3 | A LITTLE |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Go to Section SD – Smoking.

RH15**rh5nowworse**

R5 RH15 HOW MUCH FUNCTION WORSE
AFTER REHAB

QUESTION TEXT:

Did it get a lot worse, somewhat worse, or a little worse?

CODES

- | | |
|---|-------|
| 1 | A LOT |
|---|-------|

2	SOMEWHAT
3	A LITTLE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section SD – Smoking.

NHATS Round 5

Section SD [SMOKING]

Sequence: 27

BOX SD1PRE

BIX SD1PRE

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to SD1PRE.
Otherwise, go to BOX SD2.

SD1PRE

SD1PRE

NOT ON FILE

The next questions are about smoking cigarettes.

PRESS 1 AND ENTER TO CONTINUE

SD1

sd5smokedreg

R5 SD1 SMOKED REGULARLY

QUESTION TEXT:

Did {you/SP} ever smoke cigarettes regularly, at least 1 cigarette a day?

CODES

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

BOX SD2

BOX SD2

NOT ON FILE

If R1 SD1 (EVER SMOKED) = 1 (YES) or if NEWSAMPLE flag = 1 (YES), go to SD2.

Otherwise, go to SECTION PE - Performance.

SD2

sd5smokesnow

R5 SD2 SMOKES NOW

QUESTION TEXT:

{Do you/Does SP} smoke cigarettes now?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

BOX SD3

BOX SD3

NOT ON FILE

If [SD2 = 1 (YES)] or if [NEWSAMPLE flag = 1 (YES) and SD2 = 2 (NO)], go to SD3.

Otherwise, go to Section PE.

SD3**sd5numcigday**

R5 SD3 NUM OF CIGARETTES PER DAY

DISPLAY INSTRUCTIONS:

IF SD2=1 (SMOKES NOW), DISPLAY "{do you/does SP}"
ELSE IF SD2=2 (DOES NOT SMOKE NOW), DISPLAY "{did you/did SP}"

QUESTION TEXT:

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

IF NEEDED: A pack contains 20 cigarettes.

ENTER # OF CIGARETTES

ENTER 999 IF SP SMOKES LESS THAN 1 CIGARETTE PER DAY

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

IF NUMBER ENTERED VIOLATES THE HARD RANGE (SD3<1 OR SD3>120) AND SD3 <>999 THEN DISPLAY
ERROR MESSAGE #13 FROM THE GLOBAL SPEC.

BOX SD4**BOX SD4**

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to SD4.

Otherwise, go to Section PE.

SD4**sd5agesrtsmk**

R5 SD4 AGE STARTED SMOKING

QUESTION TEXT:

How old {were you/was SP} when {you/he/she} first smoked cigarettes regularly?

ENTER AGE STARTED SMOKING

ENTER NUMBER

Range	6 to 70
Soft Range	12 to 35
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE STARTED SMOKING CANNOT BE
GREATER THAN CURRENT AGE".

BOX SD5**BOXSD5**

NOT ON FILE

IF SD2=1 (SMOKES NOW), GO TO SECTION PE - PERFORMANCE

ELSE GO TO SD5

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.

NHATS Round 5

Section PE [PERFORMANCE]

Sequence: 28

PE1PRE

PE1PRE

NOT ON FILE

Next I would like to ask {you/SP} to try to perform a few simple movements, that is to move {your/{his/her}} body in different ways. Before we start, I need to ask a few questions.

PRESS 1 AND ENTER TO CONTINUE

PE1

pe5whhndsign

R5 PE1 HAND USE TO SIGN YOUR NAME

QUESTION TEXT:

Which hand {do you/does SP} use to sign {your/{his/her}} name?

CODES

- | | |
|---|------------|
| 1 | LEFT |
| 2 | RIGHT |
| 3 | BOTH |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

If PE1 = 1, set LEFTHANDED flag = 1 (yes).
If PE1 = 2, set RIGHTHANDED flag = 1 (yes).
If PE1 = 3, set EITHERHANDED flag = 1 (yes).

PE2

pe5surghdwrt

R5 PE2 HAVE SURGRY TO HAND WRIST

DISPLAY INSTRUCTIONS:

Display "in the last 3 months" in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hand or wrist?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | PE4 |
| 3 | REFUSED | PE4 |
| | DON'T KNOW | PE4 |
-

PE3

pe5surgyside

R5 PE3 WHICH SIDE WAS SURGERY

QUESTION TEXT:

Which side was that (surgery or serious injury on {your/SP's} hand or wrist)? Was it the left side or right side?

CODES

- | | | |
|---|------------|-----|
| 1 | LEFT SIDE | |
| 2 | RIGHT SIDE | |
| 3 | BOTH SIDES | PE8 |
| | REFUSED | |

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If PE3 = 1 (left hand/wrist surgery), set LEFTGRIPTEST flag = 2 (no).

If PE3 = 2 (right hand/wrist surgery), set RIGHTGRIPTEST flag = 2 (no).

If PE3 = 3 (both hands/wrists surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE4

pe5flrupain

R5 PE4 EXPER FLARE UP PAIN HAND

DISPLAY INSTRUCTIONS:

Display "currently" in bold underlined text.

QUESTION TEXT:

{Are you/Is SP} currently experiencing a flare-up of pain in either hand or wrist?

CODES

1	YES	
2	NO	PE6
3	REFUSED	PE6
	DON'T KNOW	PE6

PE5

pe5sideflrup

R5 PE5 SIDE CURRNT FLARE UP PAIN

DISPLAY INSTRUCTIONS:

Display "current" in bold underlined text.

QUESTION TEXT:

Which side is that current flare-up of pain in {your/SP's} hand or wrist? Is it the left side or right side?

CODES

1	LEFT SIDE	
2	RIGHT SIDE	
3	BOTH SIDES	PE8
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If PE5 = 1 (left hand/pain flare up), set LEFTGRIPTEST flag = 2 (no).

If PE5 = 2 (right hand/pain flare up), set RIGHTGRIPTEST flag = 2 (no).

If PE5 = 3 (both hands/pain flare ups), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE6

pe5surgarmsh

R5 PE6 SURGERY ARM OR SHOULDER

DISPLAY INSTRUCTIONS:

Display "In the last 3 months" in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} arm or shoulder

CODES

1	YES	
2	NO	PE8
	REFUSED	PE8

DON'T KNOW

PE8

PE7**pe5sidsurgar**

R5 PE7 SIDE SURGERY ARM OR SHLDR

QUESTION TEXT:

Which side was that (surgery or serious injury on {your/SP's} arm or shoulder)? Was it the left side or right side?

CODES

- 1 LEFT SIDE
- 2 RIGHT SIDE
- 3 BOTH SIDES
- REFUSED
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If PE7 = 1 (left arm/shoulder surgery), set LEFTGRIPTEST flag = 2 (no).

If PE7 = 2 (right arm/shoulder surgery), set RIGHTGRIPTEST flag = 2 (no).

If PE7 = 3 (both arms/shoulders surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE8**pe5surgyhips**

R5 PE8 SURG HIPS IN CLUD REPLCMNT

DISPLAY INSTRUCTIONS:

Display "In the last 3 months" in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hips (including hip replacement surgery)?

CODES

- 1 YES
 - 2 NO
 - REFUSED
 - DON'T KNOW
- BOX PE11
BOX PE11
BOX PE11

PE9**pe5sidhipsrg**

R5 PE9 SIDE WAS HIP SURGERY ON

QUESTION TEXT:

Was that (surgery or serious injury on {your/SP's} hips) only on one side or on both sides?

CODES

- 1 ONE SIDE
- 2 BOTH SIDES
- REFUSED
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If PE9 = 2 (both hips surgery), set CHAIRSTANDS flag = 2 (no).

BOX PE11**BOX PE11**

NOT ON FILE

If MO24 = 1 (always uses mobility device to get out of bed) or MO26 = 4 (never got out of bed by self), go

to PE11.

Otherwise go to BOX PE13.

PE11**pe5stndwhold**

R5 PE11 STAND WITHOUT HOLDING ON

DISPLAY INSTRUCTIONS:

Display "stand without holding onto anyone or anything" in bold underlined text.

QUESTION TEXT:

For a few of the body movements, I will ask {you/SP} to stand without holding onto anyone or anything. I can help {you/{him/her}} get up if {you/{he/she}} would like me to. {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE11 = 2 (not able to stand without holding on to anyone/anything), set BALANCESTANDS flag = 2 (no).

BOX PE12**BOX PE12**

NOT ON FILE

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

PE12**pe5upchbyslf**

R5 PE12 GET UP OUT CHAIR BY SELF

DISPLAY INSTRUCTIONS:

Display "without" and "by {yourself/{himself/herself}}" in bold underlined text.

If CANE flag = 1 (yes) or WALKER flag = 1 (yes), display "and without {your/{his/her}}{cane/walker/cane or walker}".

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If WALKER flag = 1 (yes) and CANE flag is null, display "walker".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

QUESTION TEXT:

I will also ask {you/SP} to get up out of a chair by {yourself/{himself/herself}}{and without {your/{his/her}}{cane/walker/cane or walker}}. {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE12 = 2 (unable to try getting up from chair without mobility devices/help), set CHAIRSTANDS flag = 2 (no).

BOX PE13**BOX PE13**

NOT ON FILE

If MO15 = 1 (used wheelchair every time to get around home/building) or MO16 = 1 (used scooter every time to get around home/building) set WALKING COURSE flag = no (2) and go to PE14.

Otherwise go to PE13.

PE13**pe5wlkdsself**

R5 PE13 WALK SHORT DIST BY SELF

DISPLAY INSTRUCTIONS:

Display "walk a short distance in this room by {yourself/{himself/herself}}" in bold underlined text.

If MO13 = 1,2,3, or 4 (used cane every time, most times, sometimes, or rarely when walking around inside) or MO14 = 1,2,3, or 4 (used walker every time, most times, sometimes, or rarely when walking around inside), display "{You/{He/She}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance."

If MO13 = 1,2,3, or 4 and MO14 ≠ 1,2,3, or 4, display "cane".

If MO14 = 1,2,3, or 4 and MO13 ≠ 1,2,3, or 4, display "walker".

If MO13 = 1,2,3, or 4 and If MO14 = 1,2,3, or 4, display "cane or walker".

QUESTION TEXT:

I will (also) be asking {you/SP} to walk a short distance in this room by {yourself/{himself/herself}}. {{{You/{He/She}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance.} {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE13 = 2 (unable to walk short distance), set WALKINGCOURSE flag = 2 (no).

PE14**PE14**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "ACTIVITIES TO SET UP AND DEMONSTRATE" in bolded text.

Display grid with 7 rows and 3 columns.

In R1C1, use null display.

In R1C2, display "ACTIVITY" in bolded text.

In R1C3, display "ADMINISTER" in bolded text.

In R2C1, display "1."

In R2C2, display "BALANCE STANDS".

In R2C3, if BALANCESTANDS flag = 2 (no), set BALANCESTANDESELIG flag = 2 (NO), and display "NO".

Otherwise, set BALANCESTANDESELIG flag = 1 (YES), and display "YES".

In R3C1, display "2."

In R3C2, display "WALKING COURSE".

In R3C3, if WALKINGCOURSE flag = 2 (no), set WALKINGCOURSESELIG flag = 2 (NO), and display "NO".

Otherwise, set WALKINGCOURSESELIG flag = 1 (YES), and display "YES".

In R4C1, use null display.

In R4C2, use null display. In R4C3:

If WALKINGCOURSESELIG flag = 1 (YES) and [MO13 = 2, 3, or 4 (used cane most times, sometimes, or rarely inside) or MO14 = 2, 3, or 4 (used walker most times, sometimes, or rarely inside)], set AIDUSAGE flag = 2 (SOMETIMES), and display "B. SOMETIMES USES CANE/WALKER AROUND HOME".

Else, if WALKINGCOURSESELIG flag = 1 (YES) and [MO13 = 1 (used cane every time inside) or MO14 = 1 (used walker

every time inside)], set AIDUSAGE flag = 3 (ALWAYS), and display “C. ALWAYS USES CANE/WALKER AROUND HOME”.

Otherwise, if WALKINGCOURSELIG flag = 1 (YES), set AIDUSAGE flag = 1 (NEVER), and display “A. DOESN’T USE CANE/WALKER AROUND HOME”.

In R5C1, display “3.”.

In R5C2, display “CHAIR STANDS”.

In R5C3, if CHAIRSTANDS flag = 2 (no), set CHAIRSTANDESELIG flag = 2 (NO), and display “NO”.

Otherwise, set CHAIRSTANDESELIG flag = 1 (YES), and display “YES”.

In R6C1, display “4.”.

In R6C2, display “GRIP STRENGTH”.

In R6C3:

If LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag=2 (no), set GRIPSTRENGTHLIG flag = 3 (NO), and display “NO”.

Else if LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag NE 2 (no), set GRIPSTRENGTHLIG flag = 1 (YES RIGHT), and display “YES RIGHT”.

Else if LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag=2 (no), set GRIPSTRENGTHLIG flag = 2 (YES LEFT), and display “YES LEFT”.

Else if [LEFTGRIPTEST flag NE 2 (NO) and RIGHTGRIPTEST flag NE 2 (no)] and [LEFTHANDED flag = 1 (YES)], set GRIPSTRENGTHLIG flag = 2 (YES LEFT), and display “YES LEFT”.

Otherwise, set GRIPSTRENGTHLIG flag = 1 (YES RIGHT), and display “YES RIGHT”.

Display “TRANSFER INFORMATION TO FRONT PAGE OF ACTIVITIES BOOKLET”

Display “AFTER ACTIVITIES ARE COMPLETED, PRESS 1 AND ENTER TO CONTINUE”

QUESTION TEXT:

ACTIVITIES TO SET UP AND DEMONSTRATE

ACTIVITY	ADMINISTER
1. BALANCE STANDS	{YES/NO}
2. WALKING COURSE	{YES/NO}
	{A. DOESN’T USE CANE/WALKER 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	
fl5lefthand	R5 F PE CAN SP DO LEFT HAND TEST
fl5righthand	R5 F PE CAN SP DO RGT HAND TEST
fl5eiherhand	R5 F PE CAN SP DO EITHR HAND TST
fl5lftgrptst	R5 F PE CAN SP DO LFT GRIP TEST
fl5rhtgrptst	R5 F PE CAN SP DO RIGHT GRIP TEST
fl5charstnds	R5 F PE CAN SP DO CHAIR STANDS
fl5balstands	R5 F PE CAN SP DO BALANCE STANDS
fl5wlkingrse	R5 F PE CAN SP DO WALKING COURSE

Affix SP ID Label

ab5datemonth R5 AB COVER DATE MONTH
ab5dateyear R5 AB COVER DATE YEAR

Date:

m	m

 /

d	d

 /

2	0	1	
y	y	y	y

Interviewer ID:

N	H	A	T				
---	---	---	---	--	--	--	--


National Health and Aging Trends Study

Activities Booklet



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	<input type="checkbox"/> YES	<input type="checkbox"/> NO	4
2. WALKING COURSE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	16
			
	<input type="checkbox"/> WA3a. Doesn't use cane/walker around home	}	17
	<input type="checkbox"/> WA3b. Sometimes uses cane/walker around home		
	<input type="checkbox"/> WA3c. Always uses cane/walker around home		
3. CHAIR STANDS	<input type="checkbox"/> YES	<input type="checkbox"/> NO	22
4. GRIP STRENGTH	<input type="checkbox"/> YES RIGHT	<input type="checkbox"/> NO	28
	<input type="checkbox"/> YES LEFT		
5. WAIST CIRCUMFERENCE	YES		34
6. PEAK AIR FLOW	YES		38



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*



GENERAL INSTRUCTIONS

Record start time:

<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	<input type="text"/>	AM
<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	<input type="text"/>	PM
HRS			MINS			

in5strtabmin R5 IN8 START TIME MINUTES

in5strtmampm R5 IN8 START TIME AM OR PM

Now I would like to ask you to try to perform a few simple movements, that is to move your body in different ways.

For each movement, I will first describe it and show it to you. Then I'd like you to try to do it.

If you feel it would be unsafe to try it, tell me, and we'll move on to the next one.

Do you have any questions before we begin?



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BALANCE STANDS

Balance Stands Administration:

BA1

☐

YES

☐

NO

GO TO WALKING COURSE p.16



- *Clear space for balance stands activity*
- *Get out stopwatch*



SIDE BY SIDE STAND

- Reset stopwatch to 0:00'00"00

Now I'll show you the first movement.

- Demonstrate with inside edges of your feet touching at the heels and toes



I want you to try to stand with your feet together, side-by-side, for about 10 seconds. You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Try to hold this position until I tell you to stop.

Do you think it would be safe to try this?

BA2

☐ YES



☐ NO

GO TO BA3 ☒ 3. Not attempted

Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

YES



NO

GO TO BA3 ☒ 3. Not attempted





Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.

SIDE BY SIDE STAND — RESULTS

ba5sxsresult R5 BA3 SIDE BY SIDE STAND RESULT BA3		
<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p style="text-align: center;">  SEMI-TANDEM Next Page </p> </div> <div style="width: 35%; text-align: center;"> <p>Time held:</p> <div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;">  </div> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 5px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 5px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 5px;"></div> </div> <div style="display: flex; justify-content: center; margin-top: 5px;"> <div style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 5px;">SECS</div> <div style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 5px;">1/100</div> </div> <div style="margin-top: 10px;">  <p style="text-align: center; color: black; font-weight: bold;">GO TO WALKING COURSE p.16</p> </div> </div> </div> <div style="width: 30%; text-align: center;"> <p>BA4</p> </div> <div style="width: 35%; text-align: center;"> <p>BA5</p> </div>		
<p>Reasons not attempted: Mark all that apply</p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div> <div style="margin-top: 20px; text-align: center;">  <p style="text-align: center; color: black; font-weight: bold;">GO TO WALKING COURSE p.16</p> </div>		

ba5blstdsecs R5 BA4A SECS SIDE BY SIDE STAND

ba5blstdhndr R5 BA4B HNRDS SIDE BY SIDE STND

ba5rsn1ssstd R5 BA5 1 NO STAND SP FELT UNSAFE

ba5rsn2ssstd R5 BA5 2 NO STAND PRXY FELT UNSF

ba5rsn3ssstd R5 BA5 3 NO STND INTWR FELT UNSF

ba5rsn4ssstd R5 BA5 4NO STND SP UNABL2UNDRSTD

ba5rsn9ssstd R5 BA5 9 NO STAND OTHER SPECIFY

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 elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

YES



NO

GO TO BA7 ☒ 3. Not attempted




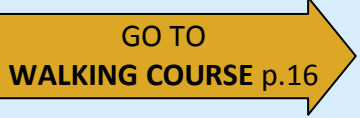
Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.

SEMI-TANDEM STAND — RESULTS

ba5stdmreslt R5 BA7 SEMI TANDEM STAND RESULT BA7		
<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<div style="text-align: center;">  FULL TANDEM Next Page </div>	<div style="text-align: right;">BA8</div> <p>Time held:</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 5px;">  </div> <div style="border: 1px solid black; width: 40px; height: 40px; margin-right: 5px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; margin-right: 5px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px;"></div> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <div style="background-color: #444; color: white; padding: 2px 5px;">SECS</div> <div style="background-color: #444; color: white; padding: 2px 5px;">1/100</div> </div> <div style="text-align: center; margin-top: 20px;">  <p>GO TO WALKING COURSE p.16</p> </div>	<div style="text-align: right;">BA9</div> <p>Reasons not attempted: <u>Mark all that apply</u></p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div style="border: 1px solid black; height: 60px; margin-top: 5px;"></div> <div style="text-align: center; margin-top: 20px;">  <p>GO TO WALKING COURSE p.16</p> </div>

ba5stdmsecs	R5 BA8A SECS HELD SEMI TANDEM STD
ba5stdmhndr	R5 BA8B HNRDS HLD SEMI TANDEM STD
ba5rsn1ststd	R5 BA9 1 NO STNDM SP FELT UNSAFE
ba5rsn2ststd	R5 BA9 2NO STNDM PRXY FELT UNSAF
ba5rsn3ststd	R5 BA9 3 NO STNDM INTR FELT UNSF
ba5rsn4ststd	R5 BA9 4NO STNDM SP UNABL2UNDSTD
ba5rsn9ststd	R5 BA9 9 NO STNDM OTHER SPECIFY



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 elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

YES



NO

GO TO BA11 ☒ 3. Not attempted

Ready, begin.



- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.



FULL TANDEM STAND — RESULTS

ba5ftdmreslt R5 BA11 FULL TANDEM STAND RESULT BA11		
<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
 <p>ONE LEG EYES OPEN Next Page</p>	<p>Time held:</p>  <p>SECS 1/100</p> <p>GO TO WALKING COURSE p.16</p>	<p>Reasons not attempted: Mark all that apply</p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div> <p>GO TO WALKING COURSE p.16</p>

ba5ftdmsecs	R5 BA12A SECS HLD FULL TANDM STD
ba5ftdmhndr	R5 BA12B HNRDS HLD FLL TANDM STD
ba5rsn1ftstd	R5 BA13 1 NO FTNDM SP FLT UNSAFE
ba5rsn2ftstd	R5 BA13 2NO FTNDM PRXY FLT UNSAF
ba5rsn3ftstd	R5 BA13 3 NO FTNDM INTR FLT UNSF
ba5rsn4ftstd	R5 BA13 4NO FTNDM SP UNABL2UNDST
ba5rsn9ftstd	R5 BA13 9 NO FTNDM OTHER SPECIFY

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 elbow with one hand while standing slightly behind and to the side
- 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



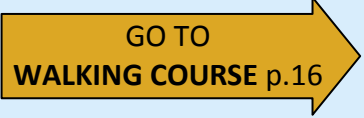
Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 30 seconds if SP is still holding position, say:

Stop.

ONE LEG STAND EYES OPEN — RESULTS

ba51leoreslt R5 BA15 ONE LEG STAND EYES OPEN BA15		
<input type="checkbox"/> 1. COMPLETED, HELD FOR 30 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 30 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<p style="text-align: center;">  ONE LEG EYES CLOSED Next Page </p>	<p style="text-align: right;">BA16</p> <p>Time held:</p> <div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 2px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 2px;"></div> </div> <div style="display: flex; align-items: center; justify-content: center; margin-top: 5px;"> <div style="background-color: #808080; color: white; padding: 2px 5px;">SECS</div> <div style="background-color: #808080; color: white; padding: 2px 5px;">1/100</div> </div> <div style="text-align: center; margin-top: 10px;">  <p>GO TO WALKING COURSE p.16</p> </div>	<p style="text-align: right;">BA17</p> <p>Reasons not attempted: <u>Mark all that apply</u></p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div> <div style="text-align: center; margin-top: 20px;">  <p>GO TO WALKING COURSE p.16</p> </div>

ba51leosfsec R5 BA16A SECS HLD 1LEG EYES OPEN

ba51leohndr R5 BA16B HNRDS HLD 1LEG EYE OPEN

ba5rsn1leo R5 BA17 1 NO1LEGEO SP FLT UNSAFE

ba5rsn2leo R5 BA17 2NO1LEGEO PRXY FLT UNSAF

ba5rsn3leo R5 BA17 3 NO1LEGEO INTR FLT UNSF

ba5rsn4leo R5 BA17 4NO1LEGEO SP UNABL2UNDST

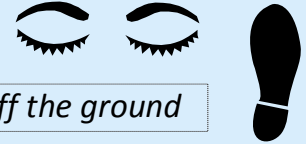
ba5rsn9leo R5 BA17 9NO1LEGEO OTHER SPECIFY



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 elbow with one hand while standing slightly behind and to the side
- 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 elbow and back

After 30 seconds if SP is still holding position, say:

Stop.



ONE LEG STAND EYES CLOSED — RESULTS

ba51lecsrslt R5 BA19 ONE LEG STAND EYES CLOS		BA19
<input type="checkbox"/> 1. COMPLETED, HELD FOR 30 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 30 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<div style="text-align: right;">BA20</div> <div style="text-align: center;">  WALKING COURSE Next Page </div>		<div style="text-align: right;">BA21</div> <div> Time held: <div style="display: flex; justify-content: center; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"> <div style="width: 20px; height: 20px; border: 1px solid black;"></div> <div style="width: 20px; height: 20px; border: 1px solid black;"></div> </div> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"> <div style="width: 20px; height: 20px; border: 1px solid black;"></div> <div style="width: 20px; height: 20px; border: 1px solid black;"></div> </div> </div> <div style="display: flex; justify-content: center; align-items: center; gap: 10px; margin-top: 5px;"> <div style="background-color: #808080; color: white; padding: 2px 5px;">SECS</div> <div style="background-color: #808080; color: white; padding: 2px 5px;">1/100</div> </div> <div style="text-align: center; margin-top: 10px;">  WALKING COURSE Next Page </div> </div> <div> Reasons not attempted: <u>Mark all that apply</u> <div style="margin-top: 10px;"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div> </div> <div style="text-align: center; margin-top: 20px;">  WALKING COURSE Next Page </div> </div>

ba51lecsfsec	R5 BA20A SECS HLD 1LEG EYES CLOS
ba51lechndr	R5 BA20B HNRDS HLD 1LEG EYE CLOS
ba5rsn1lec	R5 BA21 1 NO1LEGECS SP FLT UNSAFE
ba5rsn2lec	R5 BA21 2NO1LEGECS PRXY FLT UNSAF
ba5rsn3lec	R5 BA21 3 NO1LEGECS INTR FLT UNSF
ba5rsn4lec	R5 BA21 4NO1LEGECS SP UNABL2UNDST
ba5rsn9lec	R5 BA21 9NO1LEGECS OTHER SPECIFY

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WALKING COURSE

Walking Course Administration:

WA1

☐ YES



☐ NO

GO TO CHAIR STANDS p.22



- 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?

wa5wlkcorpc R5 WA2 WALKING COURSE SPACE WA2

☐ YES



☐ NO

GO TO WA5 ☒ 3. Not attempted



- Lay out chain straight down center of course area. Tape each end to the floor
- Using an arm's length of masking tape, place tape lengths under the two colored links of chain
- Untape chain from floor, leaving only taped start and finish lines



WALKING COURSE 1


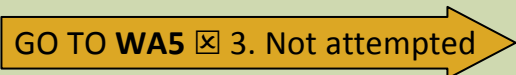



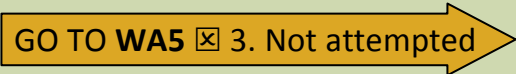
➤ Reset stopwatch to 0:00'00"00

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 <input type="checkbox"/>	<p>Do you think it would be safe to try this?</p> <p><input type="checkbox"/> YES  <input type="checkbox"/> NO </p>
WA3b <input type="checkbox"/>	<p>Do you think it would be safe to try this <u>without</u> a cane or walker?</p> <p><input type="checkbox"/> YES  <input type="checkbox"/> NO </p>
WA3c <input type="checkbox"/>	<p>You may use a cane or walker if you need to. Do you think it would be safe to try this?</p> <p><input type="checkbox"/> YES  <input type="checkbox"/> NO </p>

* 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 
---	---

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



WALKING COURSE 1 — RESULTS

wa5wkaidused R5 WA4 WALKING AID USED COURSE 1 **WA4**

Aid used:

- ☐ 1. None
- ☐ 2. Cane
- ☐ 3. Walker or rollator
- ☐ 9. Other, specify:

wa5wlkc1rslt R5 WA5 WALKING COURSE 1 RESULT **WA5**

☐ 1. COMPLETED

☐ 2. ATTEMPTED

☐ 3. NOT ATTEMPTED

WA6

WA7

Completion time:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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

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

wa5wlc1secs	R5 WA6A SECS HLD WALKNG COURSE1
wa5wlc1hndr	R5 WA6B HNRDS HLD WALKNG COURSE1
wa5rsn1wkc	R5 WA7 1 WLKCOURS1 SP FLT UNSAFE
wa5rsn2wkc	R5 WA7 2WLKCOURS1 PRXY FLT UNSAF
wa5rsn3wkc	R5 WA7 3WLKCOURS1 INTR FLT UNSF
wa5rsn4wkc	R5 WA7 4WLKCOURS1 SP UNABL2UNDST
wa5rsn5wkc	R5 WA7 5WLKCOURS1 NOT APPR SPACE
wa5rsn9wkc	R5 WA7 9WLKCOURS1 OTHER SPECIFY

WALKING COURSE 2 — RESULTS

wa5wkaidusc2 R5 WA8 WALKING AID USED COURSE 2 **WA8**

Aid used:

- ☐ 1. None
- ☐ 2. Cane
- ☐ 3. Walker or rollator
- ☐ 9. Other, specify:

wa5wlkc2rslt R5 WA9 WALKING COURSE 2 RESULT **WA9**

☐ 1. COMPLETED

WA10

Completion time:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SECS		1/100	



CHAIR STANDS
Next Page

☐ 2. ATTEMPTED



CHAIR STANDS
Next Page

☐ 3. NOT ATTEMPTED

WA11

Reasons not attempted: Mark all that apply

- ☐ 1. SP felt unsafe
- ☐ 2. Proxy felt unsafe for SP
- ☐ 3. You felt unsafe for SP/SP unsteady with support
- ☐ 4. SP unable to understand directions
- ☐ 9. Other, specify:



CHAIR STANDS
Next Page



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wa5wkc2secs	R5 WA10A SECS HLD WALKNG COURSE2
wa5wlc2hndr	R5 WA10B HNRDS HLD WALKNG COURS2
wa5rsn12wkc	R5 WA11 1 WKCOURS2 SP FLT UNSAFE
wa5rsn22wkc	R5 WA11 2WKCOURS2 PRXY FLT UNSAF
wa5rsn32wkc	R5 WA11 3WKCOURS2 INTR FLT UNSF
wa5rsn42wkc	R5 WA11 4WKCOURS2 SP UNABL2UNDST
wa5rsn92wkc	R5 WA11 9WKCOURS2 OTHER SPECIFY

CHAIR STANDS

Chair Stands Administration:

CH1

☐ YES



☐ NO

GO TO GRIP STRENGTH p.28

- Look for appropriate chair(s) for activity (hard back and preferably no arms), 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?

ch5chravail R5 CH2 APPROPRIATE CHAIR AVAIL

CH2

☐ YES



☐ NO

GO TO CH7 ☒ 3. Not attempted

- 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

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

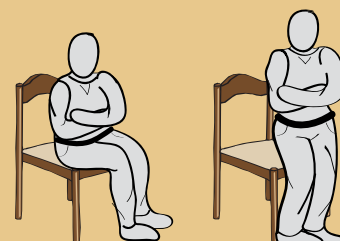
☐ YES



☐ 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.

ch5chstcompl R5 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

<div style="text-align: right; border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">CH5</div> <p>Chair Height:</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; width: 40px; height: 40px; margin-right: 5px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; margin-right: 5px;"></div> <div>INCHES</div> </div>	<div style="text-align: right; border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">CH6</div> <p><input type="checkbox"/> WHEELCHAIR USED</p>
---	--

ch5chairheit R5 CH5 CHAIR HEIGHT(INCHES)
 ch5whlchrusd R5 CH6 WHEELCHAIR USED

ch5sgchstres R5 CH7 SINGLE CHAIR STAND RESULT		CH7
<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
CH8		CH9
<p>Arm Use:</p> <p><input type="checkbox"/> 1. With arms</p> <p><input type="checkbox"/> 2. Without arms</p> <div style="text-align: center; margin-top: 20px;"> <p>REPEATED CHAIR STANDS Next Page</p> </div>	<div style="text-align: center; margin-top: 20px;"> </div>	<p>Reasons not attempted: Mark all that apply</p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 5. No appropriate chair</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div> <div style="text-align: center; margin-top: 20px;"> </div>

ch5armuse R5 CH8 CHAIR STAND ARM USE
 ch5rsn1chs R5 CH9 1CH STAND1 SP FLT UNSAFE
 ch5rsn2chs R5 CH9 2CH STAND1 PRXY FLT UNSAF
 ch5rsn3chs R5 CH9 3CH STAND1 INTR FLT UNSF
 ch5rsn4chs R5 CH9 4CH STAND1 SP UNABL2UNDST
 ch5rsn5chs R5 CH9 5CH STAND1 NOT APPR CHAIR
 ch5rsn9chs R5 CH9 9CH STAND1 OTHER SPECIFY



REPEATED CHAIR STANDS

Now, I'm going to ask you to do the same movement, but this time as **QUICKLY** as you can 5 times without stopping in between. After standing up each time, sit back down and then stand up again. Remember to keep your arms folded across your chest. I will count out loud as you stand "1, 2, 3, 4, 5" and time you with a stopwatch.

➤ Demonstrate standing from a seated position with your arms folded across your chest

Do you think it would be safe to try this?

CH10

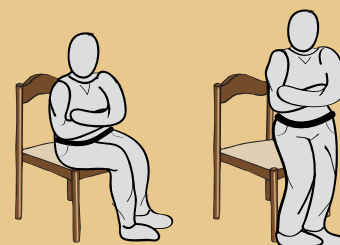
☐ YES



☐ NO

GO TO CH12 ☒ 3. Not attempted

- Stand in front of SP
- Reset stopwatch to 0:00'00"00.
- Check SP's position: sitting with arms folded over chest



Are you ready?

YES



NO

GO TO CH12 ☒ 3. Not attempted

Stand.

- Start stopwatch
- Count the number of stands out loud (1, 2, 3, 4, 5) each time SP rises

➤ Stop timing when SP has stood up the 5th time

GO TO CH12 ☒ 1. Completed

➤ Stop timing if: SP uses his/her arms, has not completed 5 stands in 1 minute, or you become concerned for SP's safety

GO TO CH12 ☒ 2. Attempted

If SP becomes tired, short of breath, or stops before completing 5 stands, ask:

Can you continue?

CH11

☐ YES



☐ NO




GO TO CH12 ☒ 2. Attempted

➤ Continue counting & timing



REPEATED CHAIR STANDS — RESULTS

ch52chstrslt R5 CH12 REPEAT CHAIR STAND RSLTS **CH12**

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
CH13	CH14	CH16
<p>Completion time:</p> <div> <div></div> <div></div> <div></div> <div></div> </div> <div>SECS 1/100</div> <p></p> <p>GRIP STRENGTH Next Page</p>	<p># of stands completed:</p> <div> <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 </div> <p>Reasons not completed: <u>Mark all that apply</u></p> <div> <input type="checkbox"/> 1. SP became tired or short of breath <input type="checkbox"/> 2. SP used SP's arms <input type="checkbox"/> 3. All stands not completed in 1 min <input type="checkbox"/> 4. You were concerned for SP's safety <input type="checkbox"/> 5. SP stopped and was unable to continue <input type="checkbox"/> 9. Other, specify: </div> <div></div> <p></p> <p>GRIP STRENGTH Next Page</p>	<p>Reasons not attempted: <u>Mark all that apply</u></p> <div> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: </div> <div></div> <p></p> <p>GRIP STRENGTH Next Page</p>



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ch5chstndsec	R5 CH13A TIME REPEAT CH STD SECS
ch5chstdhndr	R5 CH13B TIME RPEAT CH STD HNRDS
ch5chstddone	R5 CH14 NUMBER CHAIR STANDS DONE
ch5chstntdn1	R5 CH15 1 CH STD SP TIRED
ch5chstntdn2	R5 CH15 2 CH STD SP USED ARMS
ch5chstntdn3	R5 CH15 3 CH STD OVER 1 MIN
ch5chstntdn4	R5 CH15 4 CH STD CNCRN SP SAFETY
ch5chstntdn5	R5 CH15 5 CH STD SP STOPPED
ch5chstntdn9	R5 CH15 9 CH STD OTHERSPECIFY
ch5chstntat1	R5 CH16 1 NO CH ST SP UNSAFE
ch5chstntat2	R5 CH16 2 NO CH ST PRXY UNSAFE
ch5chstntat3	R5 CH16 3 NO CH ST INTV UNSAFE
ch5chstntat4	R5 CH16 4 NO CH ST SP UNAB2UNDST
ch5chstntat9	R5 CH16 9 NO CH ST OTHER SPEC



GRIP STRENGTH

Grip Strength Administration:

GR1

☐ YES RIGHT



☐ YES LEFT

☐ NO

GO TO WAIST CIRCUMFERENCE p.34

- Remove the dynamometer from its case. If the display shows no numbers, press **ON/OFF** to turn on
 - As marked in grip strength administration box, set "L" for left hand, or "R" for right hand. Press **SELECT TEST** until the correct letter appears
 - Set the number of trials to 1. If needed, press **# OF TRIALS** until 1 appears
 - Wipe dynamometer handle with an antibacterial cloth
-
- Make sure readings are displaying in KG
 - If SP has a very large hand, you can adjust the grip position to 3
 - If no numbers appear on the dynamometer display when you turn it on, check that the batteries are connected properly, and replace them if necessary



GRIP STRENGTH 1

Next, I'm going to ask you to try to squeeze this handle using your (right/left) hand.

- Demonstrate grip position while sitting with your arm in an L shape, and the dynamometer or forearm resting on a stable surface

First, bend your elbow with your arm against your side. Then grab the two pieces of metal together like this and squeeze as hard as you can. The metal will not move, but the display will give me a measure of your grip. I will ask you to do this 2 times with the same hand. If you feel any pain or discomfort, tell me, and we will stop.

Do you think it would be safe to try this?

GR2

☐ YES



☐ NO

GO TO GR5 ☒ 3. Not attempted

- Press the "TEST" button and then hand dynamometer to SP

Please get in position, but don't squeeze until I say "begin." Hold the handle while you bend your elbow with your arm against your side.

- Check SP's position: sitting with arm in L shape

Are you ready?

YES



NO

GO TO GR3 ☒ Hand tested

Begin.

When SP begins squeezing, say:

Squeeze, squeeze, squeeze!

When the numbers on the display stop changing, say:

Stop.



GRIP STRENGTH 1 — RESULTS

	GR3	GR4
Hand tested: <input type="checkbox"/> RIGHT <input type="checkbox"/> LEFT	<input type="checkbox"/> GRIP POSITION SET TO 3	gr5handstd1 R5 GR3 GRIP1 TEST WHICH HAND gr5adjgr1ps3 R5 GR4 GRIP1 POSITION ADJUST TO 3

gr5grp1reslt R5 GR5 GRIP STRENGTH 1 RESULT			GR5
<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED	
GR6		GR7	
Display reading: <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 40px; height: 40px;"></div> <div style="border: 1px solid black; width: 40px; height: 40px;"></div> <div style="font-size: 24px;">.</div> <div style="border: 1px solid black; width: 40px; height: 40px;"></div> </div> <div style="text-align: right; margin-top: 5px;">KG</div>	<div style="background-color: #f4a460; padding: 10px; border-radius: 5px; display: inline-block;"> GO TO WAIST CIRCUMFERENCE p.34 </div>	Reasons not attempted: Mark all that apply	
<div style="color: green; font-size: 48px; margin-bottom: 10px;">↓</div> GRIP STRENGTH 2 Next Page		<div style="margin-bottom: 10px;"> <input type="checkbox"/> 1. SP felt unsafe </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> 2. Proxy felt unsafe for SP </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> 4. SP unable to understand directions </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> 9. Other, specify: </div> <div style="border: 1px solid black; height: 60px; margin-bottom: 10px;"></div> <div style="text-align: center;"> <div style="background-color: #f4a460; padding: 10px; border-radius: 5px; display: inline-block;"> GO TO WAIST CIRCUMFERENCE p.34 </div> </div>	

gr5grp1rdng R5 GR6 GRP1 DISPLAY READING

gr5grp1noat1 R5 GR7 1 SP FELT UNSAFE

gr5grp1noat2 R5 GR7 2 PROXY FELT UNSAFE

gr5grp1noat3 R5 GR7 3 INTERVIEWR FELT UNSAFE

gr5grp1noat4 R5 GR7 4 SP UNABLE 2 UNDERSTAND

gr5grp1noat9 R5 GR7 9 OTHER SPECIFY




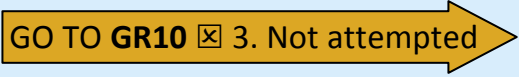
GRIP STRENGTH 2

- 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	
-----	---	----	--

Begin.

When SP begins squeezing, say:

Squeeze, squeeze, squeeze!

When the numbers on the display stop changing, say:

Stop.



GRIP STRENGTH 2 — RESULTS

Hand tested: <input type="checkbox"/> RIGHT <input type="checkbox"/> LEFT	<div style="text-align: right;">GR8</div> <div style="text-align: right;">GR9</div> <input type="checkbox"/> GRIP POSITION SET TO 3	<div>gr5handstd2 R5 GR8 GRIP2 TEST WHICH HAND</div> <div>gr5adjgr2ps3 R5 GR9 GRIP2 POSITION ADJUST TO 3</div>
--	---	---

gr5grp2reslt R5 GR10 GRIP STRENGTH 2 RESULT			GR10
<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED	
<div style="text-align: right;">GR11</div> <p>Display reading:</p> <div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; width: 30px; height: 30px; margin: 2px;"></div> <div style="border: 1px solid black; width: 30px; height: 30px; margin: 2px;"></div> <div style="margin: 0 5px;">.</div> <div style="border: 1px solid black; width: 30px; height: 30px; margin: 2px;"></div> <div style="margin-left: 10px;">KG</div> </div> <div style="text-align: center; margin-top: 20px;"> <p>WAIST CIRCUMFERENCE Next Page</p> </div>	<div style="text-align: center; margin-top: 50px;"> <p>WAIST CIRCUMFERENCE Next Page</p> </div>	<div style="text-align: right;">GR12</div> <p>Reasons not attempted: <u>Mark all that apply</u></p> <div style="margin-top: 10px;"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: </div> <div style="border: 1px solid black; height: 60px; margin-top: 10px;"></div> <div style="text-align: center; margin-top: 20px;"> <p>WAIST CIRCUMFERENCE Next Page</p> </div>	

gr5grp2rdng R5 GR11 GRP2 DISPLAY READING

gr5grp2noat1 R5 GR12 1 SP FELT UNSAFE

gr5grp2noat2 R5 GR12 2 PROXY FELT UNSAFE

gr5grp2noat3 R5 GR12 3 INTERVIEWR FELT UNSAFE

gr5grp2noat4 R5 GR12 4 SP UNABLE 2 UNDERSTAND

gr5grp2noat9 R5 GR12 9 OTHER SPECIFY





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WAIST CIRCUMFERENCE

- *Wipe down flexible measuring tape with antibacterial cloth.*
- *Determine position for SP to perform activity:*
 - *If SP can stand unassisted, perform activity with SP **standing up***
 - *If SP cannot stand or has difficulty, perform activity with SP **sitting***
 - *If SP cannot sit unassisted, perform activity with SP **lying down***
- *When administering activity, check that measuring tape:*
 - *Is horizontal all the way around SP's waist*
 - *Is lined up with SP's navel*
 - *Is snug but not tight*
 - *Has large numbers facing out*
 - *Has end that starts with 1" overlapping end with higher numbers*

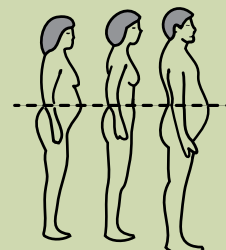


WAIST CIRCUMFERENCE

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?

☐ YES



☐ NO

GO TO WC3 ☒ 3. Not attempted

WC1

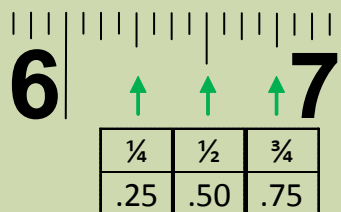
Please point to your navel. Now take this measuring tape and place it around your waist at the level of your navel.

➤ *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 1/4 inch after SP exhales*

You can stop now.



WAIST CIRCUMFERENCE — RESULTS

WC2

Measurement difficulties (mark all that apply):

- ☐ 1. None
- ☐ 2. SP had breathing difficulties
- ☐ 3. SP unable to hold breath at end of exhale
- ☐ 4. SP gave less than full effort due to illness, pain, or other symptoms or discomfort
- ☐ 5. SP gave less than full effort for non-health reason
- ☐ 6. SP had difficulty or unable to locate navel
- ☐ 9. Other, specify:

WC3

☐ 1. COMPLETED

☐ 2. ATTEMPTED

☐ 3. NOT ATTEMPTED

WC4

Tape measure reading:

. INCHES

WC5

☐ Bulky clothing worn

WC6

Measured by:

☐ 1. You ☐ 2. SP

WC7

Activity position:

- ☐ 1. Standing
- ☐ 2. Sitting
- ☐ 3. Lying down



PEAK AIR FLOW
Next Page

PEAK AIR FLOW
Next Page

WC8

Reasons not attempted: Mark all that apply

- ☐ 1. SP felt unsafe
- ☐ 2. Proxy felt unsafe for SP
- ☐ 3. You felt unsafe for SP/SP unsteady with support
- ☐ 4. SP unable to understand directions
- ☐ 5. SP Refused
- ☐ 9. Other, specify:



PEAK AIR FLOW
Next Page

Waist Circumference



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wc5measdiff1	R5 WC2 1 MEAS DIFF NONE
wc5measdiff2	R5 WC2 2 MEAS DIFF DIFF BREATH
wc5measdiff3	R5 WC2 3 MEAS DIFF NOHOLD BREATH
wc5measdiff4	R5 WC2 4 MEAS DIFF EFFORT PAIN
wc5measdiff5	R5 WC2 5 MEAS DIFF EFFORT OTHER
wc5measdiff6	R5 WC2 6 MEAS DIFF LOCATE NAVEL
wc5measdiff9	R5 WC2 9 MEAS DIFF OTHER SPECIFY
wc5waistrslt	R5 W3 WAIST CIRCUMFRNC RESULTS
wc5wstmsrinc	R5 W4A WAIST MEASURE INCHES
wc5wstmsrqrt	R5 W4B WAIST MEASURE QTR INCHES
wc5wstbulkcl	R5 WC5 BULKY CLOTHING WORN
wc5whomeasur	R5 WC6 WHO MEASURED
wc5wstpostn	R5 WC7 POSITION 4 WAIST MEASURE
wc5wstnotat1	R5 WC8 1 NO WC SP FELT UNSAFE
wc5wstnotat2	R5 WC8 2 NO WC PROXY UNSAFE
wc5wstnotat3	R5 WC8 3 NO WC INTERVIEWR UNSAFE
wc5wstnotat4	R5 WC8 4 NO WC SP UNABLE2UNDRSTD
wc5wstnotat5	R5 WC8 5 NO WC SP REFUSED
wc5wstnotat9	R5 WC8 9 NO WC OTHER SPECIFY

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

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 as hard and as fast 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.



PEAK AIR FLOW 1 — RESULTS

pk5pkarf1pos R5 PK2 PEAK AIR FLOW 1 POSITION **PK2**

Activity position:




- ☐ 1. Standing
- ☐ 2. Sitting
- ☐ 3. Lying down

pk5pkarf1ef R5 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

pk5pkarf1rs R5 PK4 PEAK AIR FLOW 1 RESULT **PK4**

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
<div>PK5</div> <p>Meter reading:</p> <div> <input type="text"/> <input type="text"/> <input type="text"/> </div> <div>L/MIN</div> <p></p> <p>PEAK AIR FLOW 2</p> <p>Next Page</p>	<p></p> <p>PEAK AIR FLOW 2</p> <p>Next Page</p>	<div>PK6</div> <p>Reasons not attempted: <u>Mark all that apply</u></p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div></div> <p>GO TO CLOSING p.44 </p>



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.

pk5pkarfl1rd	R5 PK5 PEAK AIR FLOW 1 READING
pk5pk1noatt1	R5 PK6 1 PEAK NO SP FELT UNSAFE
pk5pk1noatt2	R5 PK6 2 PEAK NO PROXY UNSAFE
pk5pk1noatt3	R5 PK6 3 PEAK NO INTERVWR UNSAFE
pk5pk1noatt4	R5 PK6 4 PEAK NO SP UNABL2UNDSTD
pk5pk1noatt9	R5 PK6 9 PEAK NO OTHER SPECIFY



PEAK AIR FLOW 2 — RESULTS

pk5paf2posit R5 PK7 PEAK AIR FLOW 2 POSITION **PK7**

Activity position:




- ☐ 1. Standing
- ☐ 2. Sitting
- ☐ 3. Lying down

pk5pkarfl2ef R5 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

pk5pkarfl2rs R5 PK9 PEAK AIR FLOW 2 RESULT **PK9**

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
<div>PK10</div> <p>Meter reading:</p> <div> <input type="text"/> <input type="text"/> <input type="text"/> </div> <div>L/MIN</div> <div>  <p>CLOSING Next Page</p> </div>	<div>  <p>CLOSING Next Page</p> </div>	<div>PK11</div> <p>Reasons not attempted: <u>Mark all that apply</u></p> <p><input type="checkbox"/> 1. SP felt unsafe</p> <p><input type="checkbox"/> 2. Proxy felt unsafe for SP</p> <p><input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support</p> <p><input type="checkbox"/> 4. SP unable to understand directions</p> <p><input type="checkbox"/> 9. Other, specify:</p> <div></div> <div>  <p>CLOSING Next Page</p> </div>

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pk5pkarfl2rd	R5 PK10 PEAK AIR FLOW 2 READING
pk5pk2noatt1	R5 PK11 1 PEAK NO SP FELT UNSAFE
pk5pk2noatt2	R5 PK11 2 PEAK NO PROXY UNSAFE
pk5pk2noatt3	R5 PK11 3 PEAK NO INTRVWR UNSAFE
pk5pk2noatt4	R5 PK11 4 PEAK NO SP UNABL2UNDST
pk5pk2noatt9	R5 PK11 9 PEAK NO OTHER SPECIFY

CLOSING

Record end time:

<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> AM
HRS			MINS		<input type="checkbox"/> PM

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

cl5endtimhrs	R5 CL1 HRS END TIME HOURS
cl5endtimmin	R5 CL1 MINS END TIME MINUTES
cl5endtmampm	R5 CL1 AMPM END TIME AM OR PM
r5dnhatssppb	R5 D NHATS SPPB SCORE
r5dnhatbasc	R5 D NHATS BALANCE SCORE
r5dnhatwks	R5 D NHATS WALK SCORE
r5dnhatshsc	R5 D NHATS REPEAT CHAIR SCORE
r5dnhatgrav	R5 D NHATS AVG GRIP SCORE
r5dnhatgrb	R5 D NHATS BEST GRIP SCORE
r5dnhatpkav	R5 D NHATS AVG AIR FLOW SCORE
r5dnhatpkb	R5 D NHATS BEST AIR FLOW SCORE
r5dspbmiss	R5 D REASON MISSING SPPB
r5dorigsppb	R5 D ORIGINAL SPPB SCORE
r5dorigbasc	R5 D ORIGINAL BALNCE SCORE
r5dorigwks	R5 D ORIGINAL WALK SCORE

r5dorigchsc	R5 D ORIGINAL REPEAT CHAIR SCORE
ba5dblssadm	R5 D BALANCE SIDE BY SIDE ADMIN
ba5dblstdm	R5 D BALANCE SEMI TANDEM ADMIN
ba5dblftadm	R5 D BALANCE FULL TANDEM ADMIN
ba5dblopadm	R5 D BALANCE 1 LEG OP EYE ADMIN
ba5dblcladm	R5 D BALANCE 1 LEG CLS EYE ADMIN
wa5dwlkadm	R5 D WALKING COURSE ADMIN
ch5dschradm	R5 D SINGLE CHAIR ADMIN
ch5drchradm	R5 D REPEAT CHAIR ADMIN
gr5dgripadm	R5 D GRIP STRENGTH ADMIN
wc5dwaistadm	R5 D WAIST CIRCUMFERENCE ADMIN
pk5dpeakadm	R5 D PEAK AIR FLOW ADMIN



NHATS Round 5

Section HW [HEIGHT AND WEIGHT]

Sequence: 29

HW1PRE

HW1PRE

NOT ON FILE

QUESTION TEXT:

Now, I have a few questions about {your/SP's} height and weight.

PRESS 1 AND ENTER TO CONTINUE

HW2

hw5currweigh

R5 HW2 YOU CURRENTLY WEIGH

QUESTION TEXT:

How much {do you/does SP} currently weigh?

ENTER WEIGHT IN POUNDS

ENTER NUMBER

Range

65 to 600

Soft Range

90 to 300

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: 65-600.

Soft range: 90-300.

BOX HW3

BOX HW3

NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to HW3.

Otherwise, go to HW4.

HW3

hw5weighat50

R5 HW3 WEIGH AT ABOUT AGE 50

DISPLAY INSTRUCTIONS:

Display "age 50" in bold underlined text.

QUESTION TEXT:

What was {your/SP's} usual weight at about age 50? If you don't remember exactly, please make your best guess.

ENTER WEIGHT IN POUNDS

ENTER NUMBER

Range

65 to 600

Soft Range

90 to 300

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: 65-600.

Soft range: 90-300.

HW4**hw5lst10pnds**

R5 HW4 LOST 10 POUNDS IN LAST YR

DISPLAY INSTRUCTIONS:

Display "lost 10 or more pounds" in bold underlined text.

QUESTION TEXT:

{Have you/Has SP} lost 10 or more pounds in the last 12 months?

CODES

1	YES	
2	NO	HW7
	REFUSED	HW7
	DON'T KNOW	HW7

HW5**hw5trytolose**

R5 HW5 WERE YOU RYNG LOSE WEGHT

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HW7**hw5howtallft**

R5 HW7 HOW TALL ARE YOU FEET

DISPLAY INSTRUCTIONS:

Display HW7 and HW8 on the same screen.

QUESTION TEXT:

How tall {are you/is SP}?

ENTER HEIGHT IN FEET

ENTER NUMBER

Range	3 to 7
Soft Range	4 to 6
REFUSED	BOX HW9
DON'T KNOW	BOX HW9

PROGRAMMER INSTRUCTIONS:

Hard range: 3-7.

Soft range: 4-6.

HW8**hw5howtallin**

R5 HW8 HOW TALL ARE YOU INCHES

DISPLAY INSTRUCTIONS:

Display HW7 and HW8 on the same screen.

QUESTION TEXT:

[How tall {are you/is SP}?:]

ENTER HEIGHT IN INCHES

ENTER NUMBER

Range

0 to 11

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range 0-11

BOX HW9

BOX HW9

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to HW9.

Otherwise, go to Section EL - Early Life.

HW9

hw5tal50feet

R5 HW9 TALL WOT SHOE AGE 50 FEET

DISPLAY INSTRUCTIONS:

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

QUESTION TEXT:

How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.

ENTER HEIGHT IN FEET

ENTER NUMBER

Range

3 to 7

Soft Range

4 to 6

REFUSED

SECTION EL

DON'T KNOW

SECTION EL

PROGRAMMER INSTRUCTIONS:

Hard range: 3-7.

Soft range: 4-6.

HW10

hw5tal50inch

R5 HW10 TALL WOUT SHOE 50 INCHES

DISPLAY INSTRUCTIONS:

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

QUESTION TEXT:

[How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.]

ENTER HEIGHT IN INCHES

ENTER NUMBER

Range

0 to 11

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range 0-11

Go to Section EL - Early Life

NHATS Round 5

Section EL [EARLY LIFE]

Sequence: 30

BOX EL1PRE

BOX EL1PRE

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to EL1PRE..
Otherwise, go to BOX EL11.

EL1PRE

EL1PRE

NOT ON FILE

QUESTION TEXT

Now I want to ask a few questions about when {you were/SP was} younger.

PRESS 1 AND ENTER TO CONTINUE

EL1

el5borninus

R5 EL1 WERE YOU BORN IN THE US

QUESTION TEXT:

{Were you/Was SP} born in the United States?

CODES

1	YES	
2	NO	EL3
	REFUSED	EL3
	DON'T KNOW	EL3

EL2

el5stateborn (Restricted)

R5 EL2 WHAT STATE WERE YOU BORN

QUESTION TEXT:

In what state {were you/was SP} born?

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

REFUSED	EL5
DON'T KNOW	EL5

PROGRAMMER INSTRUCTIONS:

Use lookup file (59STATERR) of state names.
Display response label for state name selected.
All responses skip to EL5.

EL3

el5cntryborn (Restricted)

R5 EL3 WHAT CONTRY WERE YOU BORN

QUESTION TEXT:

In what country {were you/was SP} born?

TYPE THE FIRST 3 LETTERS OF THE COUNTRY. THEN USE ARROW KEYS TO LOCATE COUNTRY, AND
PRESS ENTER TO SELECT. IF COUNTRY IS NOT LISTED, SELECT 'NOT ON LIST'

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use the 'Country List' as lookup file.
Enable alphabetic search.
Display response label for country selected
If "NOT ON LIST SELECTED", go to EL3a.
Otherwise, go to EL4a.

EL3A **el5spbrcntry (Restricted)** R5 EL3A SPECIFY COUNTRY OF BIRTH

QUESTION TEXT:

SPECIFY COUNTRY OF BIRTH

ENTER TEXT

ENTER TEXT

Length 50

EL4A **el5yrcometus (Restricted)** R5 EL4A YEAR CAME TO LIVE IN US

QUESTION TEXT:

In about what year did {you/SP} first come to live in the United States?

ENTER YEAR [EL5]

ENTER NUMBER

REFUSED EL5
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range CURRENT YEAR – 110
Soft range CURRENT YEAR – 65

If year entered is \leq SP BIRTH YEAR from IS6, display error message "INVALID RESPONSE. YEAR CAME TO UNITED STATES CANNOT BE EARLIER THAN SP BIRTH YEAR."

EL4B **el5agecomlus(restricted)** R5 EL4B AGE CAME TO LIVE IN US

QUESTION TEXT:

At about what age did {you/SP} first come to live in the United States?

IF LESS THAN 1 YEAR OLD, ENTER 0

ENTER AGE

ENTER NUMBER

Range 0 to 110
Soft Range 0 to 65
REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range 0-110

Soft range 0-65

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE CAME TO UNITED STATES CANNOT BE GREATER THAN CURRENT AGE."

EL5

el5hlthchild

R5 EL5 YOUR HEALTH AS CHILD

QUESTION TEXT:

Thinking about when {you were/SP was} growing up, would you say that {you/his/her} health as a child was excellent, very good, good, fair, or poor?

CODES

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

EL6

el5fingrowup

R5 EL6 WELL OFF FINANLY GROWG UP

QUESTION TEXT:

SHOW CARD EL1

How well off financially {was your/was SP's} family when {you were/{he/she} was} growing up? Was it well off, above average, average, below average, or poor?

CODES

- | | |
|---|---------------|
| 1 | WELL OFF |
| 2 | ABOVE AVERAGE |
| 3 | AVERAGE |
| 4 | BELOW AVERAGE |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |

EL7

el5lvbpar15

R5 EL7 LIV W BTH PRNTS TO AGE 15

DISPLAY NSTRUCTIONS:

Display "both" in bold underlined text.

QUESTION TEXT:

Did {you/SP} live with both of {your/his/her} parents (birth or adopted) for most of {your/his/her} childhood up to the age of 15?

CODES

1	YES	BOX EL9
2	NO	
	REFUSED	BOX EL9
	DON'T KNOW	BOX EL9

EL8	el5lvwmofaor	R5 EL8 LIV W MOTHER FATHR OR OTH
------------	---------------------	----------------------------------

QUESTION TEXT:

Did {you/SP} live with {your/his/her} mother only, {your/his/her} father only, another relative, or with non-relatives?

CODES

1	MOTHER ONLY
2	FATHER ONLY
3	ANOTHER RELATIVE
4	NON-RELATIVES
5	VARIED/MOVED AROUND
	REFUSED
	DON'T KNOW

BOX EL9	BOXEL9	NOT ON FILE
----------------	---------------	-------------

If (EL1=2 (NO, BORN OUTSIDE THE U.S.), DK, or RF) and (EL4b>15 or (EL4a-SP'S BIRTH YEAR>15)), go to EL10.
Otherwise, go to EL9a.

EL9A	el5lvctytn15 (Restricted)	R5 EL9A WHR LIV CITY/TOWN AGE 15
-------------	----------------------------------	----------------------------------

QUESTION TEXT:

Where did {you/SP} live when {you were/{he/she} was} age 15?

ENTER CITY/TOWN

CONFIRM SPELLING

ENTER TEXT

Length	25
--------	----

EL9B	el5stlivag15 (Restricted)	R5 EL9B STATE LIVED AT AGE 15
-------------	----------------------------------	-------------------------------

QUESTION TEXT:

[Where did {you/SP} live when {you were/{he/she} was} age 15?]

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

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use the lookup file (59STATERR) of state names.

Display response label for state name selected.

EL10

el5higstschl

R5 EL10 HGHST DGREE SCOOOL COMPLD

QUESTION TEXT:

SHOW CARD EL2

What is the highest degree or level of school {you/SP} completed?

CODES

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

BOX EL11

BOXEL11

NOT ON FILE

If LAST INT EL11 = 2 (NO), RF, or DK, SET CURRENT INT EL11 = VALUE OF LAST INT and go to BOX EL12.
Else, if any HOUSEHOLD MEMBER RELATIONSHIP = 13 (MOTHER), set EL11=1 (YES) and go to BOX EL12.
Otherwise, go to EL11

EL11

el5mothalive

R5 EL11 YOUR MOTHER STILL LIVING

QUESTION TEXT:

Is {your/SP's} mother still living?

CODES

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

BOX EL12

BOXEL12

NOT ON FILE

If LAST INT EL12 = 2 (NO), RF, or DK, SET CURRENT INT EL12 = VALUE OF LAST INT and go to Section NA - Names.
Else, if any HOUSEHOLD MEMBER RELATIONSHIP = 16(FATHER), set EL12=1 (YES) and go to Section NA - Names.
Otherwise go to EL12

QUESTION TEXT:

Is {your/SP's} father still living?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section NA – Names.

Derived Variables from Items in EL Section	
el5dsameres	R5 D CITY STATE NOW AND AGE 15

NHATS Round 5

Section NA [NAMES]

Sequence: 31

BOX NA1PRE

BOX NA1PRE

NOT ON FILE

If NEWSAMPLE flag=1 (YES) and [EL1 = 1 (BORN IN US) or EL4A ≤ 1940 (CAME TO US BY 1940) or [EL1 = 2 (BORN OUTSIDE US) and EL4A = DK or RF and EL4B <> DK, RF and (EL4B + SP YEAR OF BIRTH) ≤ 1940]] set INUS1940 flag = 1 (YES).

Else if R1 EL1 = 1 (BORN IN US) or R1 EL4A ≤ 1940 (CAME TO US BY 1940) or [R1 EL1 = 2 (BORN OUTSIDE US) and R1 EL4A = DK or RF and R1 EL4B <> DK, RF and (R1 EL4B + SP YEAR OF BIRTH) ≤ 1940] set INUS1940 flag = 1 (YES).

If [SP YEAR OF BIRTH ≤ 1939 or (SP YEAR OF BIRTH = 1940 and SP MONTH OF BIRTH = 1 (JANUARY), 2 (FEBRUARY) or 3 (MARCH))] and INUS1940 flag = 1 (YES), go to NA1PRE.

Otherwise, go to Section RL – Race, Ethnicity, and Language.

NA1PRE

NA1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If SP YEAR OF BIRTH < 1940 display “{you/SP} turned {1940 – SP YEAR OF BIRTH}”.

Else if SP YEAR OF BIRTH = 1940 display “{you were/SP was} born”.

QUESTION TEXT:

We would like to get historic information that is available to the public from the Census about where {you/SP} grew up and {your/his/her} family circumstances. To do this, we have a few questions about where {you/SP} lived in 1940, that is the year {you /SP} turned {1940 – SP YEAR OF BIRTH}} / {you were/SP was} born}.

PRESS 1 AND ENTER TO CONTINUE

IF RESPONDENT REFUSES/DOESN'T KNOW, PRESS 7 AND ENTER

CODES

1

CONTINUE

7

REFUSED/DON'T KNOW

Section RL

NA1

NA1

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display “first” in underlined text.

QUESTION TEXT:

In what state {were you/was SP} living in 1940?

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

PRESS ENTER TO SELECT

ENTER TEXT

Length

2

PROGRAMMER INSTRUCTIONS:

Use lookup file (59STATETERR) of state names.
Display state name response label.

BOX NA2A

BOX NA2A

NOT ON FILE

If NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [EL7 = 1 (LIVED WITH BOTH PARENTS) or EL8 = 1 (LIVED WITH MOTHER ONLY)], go to NA2A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [R1 EL7 = 1 (LIVED WITH BOTH PARENTS) or R1 EL8 = 1 (LIVED WITH MOTHER ONLY)], go to NA2A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and EL8 = 2 (LIVED WITH FATHER ONLY), go to NA3A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and R1 EL8 = 2 (LIVED WITH FATHER ONLY), go to NA3A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and EL7 (LIVED WITH BOTH PARENTS) = DK, RF, go to NA4A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and R1 EL7 (LIVED WITH BOTH PARENTS) = DK, RF, go to NA4A.

Else if NEWSAMPLE flag = 1 (YES) and SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [EL8 = 3 (ANOTHER RELATIVE) or EL8 = 4 (NON-RELATIVES)], go to NA4A.

Else if SP YEAR OF BIRTH >= 1924 and INUS1940 flag = 1 (YES) and [R1 EL8 = 3 (ANOTHER RELATIVE) or R1 EL8 = 4 (NON-RELATIVES)], go to NA4A.

Otherwise, go to NA4A.

NA2A

NA2A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

Display NA2A and NA2B on the same screen.

QUESTION TEXT:

What was {your/SP's} mother's first name?

CONFIRM SPELLING

Enter Text

Length

45

REFUSED
DON'T KNOW

NA2B	NA2B	NOT ON FILE
-------------	-------------	-------------

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

QUESTION TEXT:

What was {your/SP's} mother's last name?

CONFIRM SPELLING

Enter Text

Length	25
REFUSED	
DON'T KNOW	

BOX NA3A	BOX NA3A	NOT ON FILE
-----------------	-----------------	-------------

If NEWSAMPLE flag = 1 (YES) and [EL7 = 1 (LIVED WITH BOTH PARENTS) or EL8 = 2 (LIVED WITH FATHER ONLY)], go to NA3A.

Else if R1 EL7 = 1 (LIVED WITH BOTH PARENTS) or R1 EL8 = 1 (LIVED WITH FATHER ONLY), go to NA3A.

Otherwise, go to BOX NA4A.

NA3A	NA3A	NOT ON FILE
-------------	-------------	-------------

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

Display NA3A and NA3B on the same screen.

QUESTION TEXT:

What was {your/SP's} father's first name?

CONFIRM SPELLING

Enter Text

Length	45
REFUSED	
DON'T KNOW	

NA3B	NA3B	NOT ON FILE
-------------	-------------	-------------

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

QUESTION TEXT:

What was {your/SP's} father's last name?

CONFIRM SPELLING

Enter Text

Length 25
REFUSED
DON'T KNOW

BOX NA4A**BOX NA4A**

NOT ON FILE

If (NA2A = NULL (NO MOTHER FIRST NAME), RF, or DK) and (NA3A = NULL (NO FATHER FIRST NAME), RF, or DK), go to NA4A.

Otherwise, go to Box NA5.

NA4A**NA4A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

Display NA4A and NA4B on the same screen.

QUESTION TEXT:

What was the first name of someone {you/SP} lived with in 1940?

CONFIRM SPELLING

ENTER 95 IF SP LIVED ALONE

Enter Text

Length 45
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If NA4A=95 (SP LIVED ALONE), go to BOX NA5.

NA4B**NA4B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

Display NA4A and NA4B on the same screen.

QUESTION TEXT:

What was that person's last name?

CONFIRM SPELLING

Enter Text

Length	25
REFUSED	
DON'T KNOW	

BOX NA5**BOX NA5**

NOT ON FILE

If (SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED), 2 (LIVING WITH PARTNER), 3 (SEPARATED), 4 (DIVORCED), 5 (WIDOWED), DK or RF) and SP GENDER from PERSON ROSTER = 2 (FEMALE), go to NA5.

Otherwise, go to Section RL – Race, Ethnicity, and Language.

NA5**NA5**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If NA2B or NA3B <> NULL, display “And just to confirm, what”.

Otherwise, display “What”.

If SP YEAR OF BIRTH < 1940 display “{you/SP} turned {1940 - SP YEAR OF BIRTH}”.

Else if SP YEAR OF BIRTH = 1940 display “{you were/SP was} born”.

QUESTION TEXT:

{And just to confirm, what/What} was {your/SP's} last name in 1940, that is, the year {{you/SP} turned {1940 - SP YEAR OF BIRTH}}/{you were/SP was} born}?

IF NOT PREVIOUSLY CONFIRMED, CONFIRM SPELLING.

Enter Text

Length	25
--------	----

PROGRAMMER INSTRUCTIONS:

Go to Section RL – Race, Ethnicity, and Language.

NHATS Round 5

Section RL [RACE, ETHNICITY, LANGUAGE]

Sequence: 32

BOX RL1PRE

BOX RL1PRE

NOT ON FILE

If NEWSAMPLE flag = 1 (YES), go to RL1PRE.
Otherwise, go to Section VA - Veteran's Status

RL1PRE

RL1PRE

NOT ON FILE

QUESTION TEXT

Now we'd like to ask you some questions about {your/SP's} race and ethnic background.

PRESS 1 AND ENTER TO CONTINUE

RL1

r15yourrace1 (Sensitive)

R5 RL1 RACE OF SP WHITE

r15yourrace2 (Sensitive)

R5 RL1 RACE OF SP AFRICAN AMERICAN

r15yourrace3 (Sensitive)

R5 RL1 RACE OF SP AMERICAN INDIAN

r15yourrace4 (Sensitive)

R5 RL1 RACE OF SP ALASKA NATIVE

r15yourrace5 (Sensitive)

R5 RL1 RACE OF SP ASIAN

r15yourrace6 (Sensitive)

R5 RL1 RACE OF SP NATIVE HAWAIIAN

r15yourrace7 (Sensitive)

R5 RL1 RACE OF SP PACIFIC ISLANDER

r15yourrace8 (Sensitive)

R5 RL1 RACE OF SP OTHER SPECIFY

QUESTION TEXT:

SHOW CARD RL1

What race {do you/does SP} consider {yourself/himself/herself} to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, or something else?

SELECT ALL THAT APPLY

CODES

Code All That Apply

1	WHITE/CAUCASIAN	BOX RL2
2	BLACK/AFRICAN AMERICAN	BOX RL 2
3	AMERICAN INDIAN	BOX RL2
4	ALASKA NATIVE	BOX RL2
5	ASIAN	BOXRL2
6	NATIVE HAWAIIAN	BOX RL2
7	PACIFIC ISLANDER	BOX RL2
8	OTHER (SPECIFY)	
	REFUSED	BOX RL2
	DON'T KNOW	BOX RL2

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

RL1A

RL1A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER RACE

ENTER TEXT

Length

75

BOX RL2

BOXRL2

NOT ON FILE

If more than one response category selected at RL1, continue.

Otherwise, go to RL3.

RL2

rl5primarace (Sensitive)

R5 RL2 RACE CONSID YRSLF PRIMRLY

DISPLAY INSTRUCTIONS:

Display “or” between each race in question text.

In question text, display only response categories selected at RL1.

Display only response codes from categories selected at RL1.

QUESTION TEXT:

{Do you consider yourself/Does SP consider {himself/herself}} primarily {RESPONSE CATEGORIES SELECTED AT RL1}?

CODES

Code All That Apply

- | | |
|---|------------------------------|
| 1 | WHITE/CAUCASIAN |
| 2 | BLACK/AFRICAN AMERICAN |
| 3 | AMERICAN INDIAN |
| 4 | ALASKA NATIVE |
| 5 | ASIAN |
| 6 | NATIVE HAWAIIAN |
| 7 | PACIFIC ISLANDER |
| 8 | OTHER RACE SPECIFIED AT RL1A |
| | REFUSED |
| | DON'T KNOW |

RL3

rl5hisplatno (Sensitive)

R5 RL3 CNSDR YRSF HSPAN OR LATNO

QUESTION TEXT:

{Do you/Does SP} consider {yourself/himself/herself} Hispanic or Latino?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | RL5 |
| | REFUSED | RL5 |
| | DON'T KNOW | RL5 |

RL4

rl1mexpurcu1 (Sensitive)

R5 RL4 HISP ETHNCTY MEXICAN AMER

rl1mexpurcu2 (Sensitive)

R5 RL4 HISP ETHNCTY PUERO RICAN

rl1mexpurcu3 (Sensitive)

R5 RL4 HISP ETHNCTY CUBAN AMER

rl1mexpurcu4 (Sensitive)

R5 RL4 HISP ETHNCTY OTHR SPECIFY

R5 RL4 HISP ETHNCTY DOMINICAN

rl1mexpurcu5 (Sensitive)	R5 RL4 HISP ETHNCTY CENTRAL AMER
rl1mexpurcu6 (Sensitive)	R5 RL4 HISP ETHNCTY SOUTH AMER
rl1mexpurcu7 (Sensitive)	R5 RL4 HISP ETHNCTY SPANISH
rl1mexpurcu8 (Sensitive)	

QUESTION TEXT:

SHOW CARD RL2
Would {you/SP} say {you are/{he/she} is} Mexican American, Puerto Rican, Cuban American, or something else?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	MEXICAN AMERICAN/CHICANO	RL5
2	PUERTO RICAN	RL5
3	CUBAN AMERICAN	RL5
4	OTHER (SPECIFY)	
	REFUSED	RL5
	DON'T KNOW	RL5

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

RL4A	RL4A	NOT ON FILE
-------------	-------------	-------------

QUESTION TEXT:

SPECIFY OTHER HISPANIC OR LATINO GROUP

ENTER TEXT

Length 75

RL5	rl5condspanh	R5 RL5 INTRVIW CONDCD IN SPANSH
------------	---------------------	---------------------------------

QUESTION TEXT:

IS THIS INTERVIEW BEING CONDUCTED IN SPANISH?

CODES		
1	YES	RL7
2	NO	

RL6	rl5spkothlan	R5 RL6 SPEAK LANG OTH THN ENGLISH
------------	---------------------	-----------------------------------

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

r15unspokeng

R5 RL7 HOW UNDRSTND SPOKEN ENGL

QUESTION TEXT:

How well would you say {you understand/SP understands} English when someone is speaking to {you/him/her}? Would you say very well, well, not well, or not at all?

CODES

- 1 VERY WELL
- 2 WELL
- 3 NOT WELL
- 4 NOT AT ALL
- REFUSED
- DON'T KNOW

RL8

r15spkengwel

R5 RL8 HOW WELL SPEAK ENGLISH

QUESTION TEXT:

How well would you say {you speak/SP speaks} English? Would you say very well, well, not well, or not at all?

CODES

- 1 VERY WELL
- 2 WELL
- 3 NOT WELL
- 4 NOT AT ALL
- REFUSED
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section VA – Veteran's Status.

Derived Variables from Items in RL Section	
--	--

r15dracehisp	R5 D RACE AND HISPANIC ETHNICITY
--------------	----------------------------------

NHATS Round 5

Section VA [VETERAN'S STATUS]

Sequence: 33

VA1 va5serarmfor R5 VA1 SERVED IN ARMED FORCES

QUESTION TEXT:

Did {you/SP} ever serve on active duty in the Armed Forces of the United States?

CODES

1	YES	
2	NO	VA3
	REFUSED	VA3
	DON'T KNOW	VA3

VA2	va5whnserva1 (Sensitive)	R5 VA2 WHEN SERVD BEFRE NOV 1941
	va5whnserva2 (Sensitive)	R5 VA2 WHN SERVD WWII
	va5whnserva3 (Sensitive)	R5 VA2 WHN SERVD 1947 TO 1950
	va5whnserva4 (Sensitive)	R5 VA2 WHN SERVD KOREAN WAR
	va5whnserva5 (Sensitive)	R5 VA2 WHN SERVD 1955 TO 1964
	va5whnserva6 (Sensitive)	R5 VA2 WHN SERVD VIETNAM ERA
	va5whnserva7 (Sensitive)	R5 VA2 WHN SERVD 1975 TO 1990
	va5whnserva8 (Sensitive)	R5 VA2 WHN SERVD 1990 TO 2001
	va5whnserva9 (Sensitive)	R5VA2 WHN SERVD 2001 OR LATER

QUESTION TEXT:

SHOW CARD VA1

When did {you/SP} serve on active duty in the U.S. Armed Forces?

SELECT ALL THAT APPLY

SELECT EACH PERIOD SP SERVED, EVEN IF IT WAS ONLY FOR PART OF THE PERIOD

CODES

Code All That Apply

1	NOVEMBER 1941 OR EARLIER
2	WORLD WAR II (DECEMBER 1941-DECEMBER 1946)
3	JANUARY 1947 – JUNE 1950
4	KOREAN WAR (JULY 1950 – JANUARY 1955)
5	FEBRUARY 1955 – JULY 1964
6	VIETNAM ERA (AUGUST 1964 – APRIL 1975)
7	MAY 1975 – JULY 1990
8	AUGUST 1990 – AUGUST 2001 (INCLUDING PERSIAN GULF WAR)
9	SEPTEMBER 2001 OR LATER
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

VA3 va5memnatgrd R5VA3 MEMBER OF NATIONAL GUARD

QUESTION TEXT:

{Were you/Was SP} ever an active member of a National Guard or military reserve unit?

CODES

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

BOX VA4

BOX VA4

NOT ON FILE

If VA1=1 (YES) or VA3=1 (YES), go to VA4.

Otherwise, go to Section WB – Well-being.

VA4

va5disability

R5 VA4 SERVICE RELATED DISABILITY

QUESTION TEXT:

{Do you/Does SP} have a disability related to service in the Armed Forces, the National Guard, or military reserve of the United States?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section WB – Well-being.

NHATS Round 5

Section WB [WELL-BEING]

Sequence: 34

BOX WB1PRE

BOXWB1PRE

NOT ON FILE

If PROXY flag=1 (YES), go to Section IP – Insurance Plans.

Otherwise, continue.

WB1PRE

WB1PRE

NOT ON FILE

QUESTION TEXT

The next few questions focus on your feelings over the last month.

PRESS 1 AND ENTER TO CONTINUE

WB1

wb5offelche1

R5 WB1 OFTEN YOU FEEL CHEERFUL

wb5offelche2

R5 WB1 OFTEN YOU FEEL BORED

wb5offelche3

R5 WB1 OFTEN YOU FEEL FULL OF LIFE

wb5offelche4

R5 WB1 OFTEN YOU FEEL UPSET

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display for WB1 [a-d]

If at WB1a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

SHOW CARD WB1

{{}}During the last month, how often did you feel{{}}

{variable text [a-d]}

RESPONSE [1] a. cheerful?

RESPONSE [2] b. bored?

RESPONSE [3] c. full of life?

RESPONSE [4] d. upset?

{{}}Would you say every day, most days, some days, rarely, or never?{{}}

CODES

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

PROGRAMMER INSTRUCTIONS:

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

WB2	wb5truestme1	R5 WB2 SP LIFE HAS MEANING PURPS
	wb5truestme2	R5 WB2 SP FEELS CONFIDENT
	wb5truestme3	R5 WB2 SP GAVE UP IMPROVING LIFE
	wb5truestme4	R5 WB2 SP LIKES LIVING SITUATION

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for WB2 [a-d]

If at WB2a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{{}}Next, tell me whether you agree a lot, a little, or not at all with the following statements about your life.{{}}

{variable text [a-d]}

RESPONSE [1] a. My life has meaning and purpose.

RESPONSE [2] b. I feel confident and good about myself.

RESPONSE [3] c. I gave up trying to improve my life a long time ago.

RESPONSE [4] d. I like my living situation very much.

CODES

- | | |
|---|------------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

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

WB3	wb5ageyofeel	R5 WB3 AGE YO FEEL MOST OF TIME
------------	---------------------	---------------------------------

QUESTION TEXT:

Sometimes people feel older or younger than their age. During the last month, what age did you feel most of the time?

ENTER AGE

ENTER NUMBER

Range	18 to 110
REFUSED	
DON'T KNOW	

WB4	wb5agrwestmt1	R5 WB4 SP SELF DETERMINATION
	wb5agrwestmt2	R5 WB4 SP WANTS-FINDS WAY TO DO

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display for WB4 [a-c

If at WB4a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{{}}For these last few statements, please tell me if you agree a lot, a little, or not at all.{{}}

{variable text [a-c]}

RESPONSE [1] a. Other people determine most of what I can and cannot do.

RESPONSE [2] b. When I really want to do something, I usually find a way to do it.

RESPONSE [3] c. I have an easy time adjusting to change.

CODES

- | | |
|---|------------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

Go to Section IP – Insurance Plans.

NHATS Round 5

Section IP [INSURANCE PLANS]

Sequence: 35

IP1PRE

IP1PRE

NOT ON FILE

QUESTION TEXT:

Now we have a few questions about {your/SP's} health insurance.

PRESS 1 AND ENTER TO CONTINUE

IP1

ip5covmedcad

R5 IP1 COVERD BY MEDICARE PART D

QUESTION TEXT:

{Are you/Is SP} (currently) covered by or enrolled in a Medicare Prescription Drug plan, also called Part D?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | IP3 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |
-

IP2

ip5otdrugcov

R5 IP2 DRUG COVERG SOME OTHER WAY

QUESTION TEXT:

{Do you/Does SP} have prescription drug coverage through a current or former employer or some other way?

CODES

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

IP3

ip5mgapmedsp

R5 IP3 MEDIGAP OR MEDICARE SUPP

QUESTION TEXT:

Some people have additional coverage besides Medicare to pay for doctors and other medical care. This is sometimes referred to as Medigap or a Medicare Supplement. {Do you/Does SP} have this type of health insurance coverage?

CODES

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

IP4

ip5cmedicaid

R5 IP4 COV BY STATE MEDICAID PRG

DISPLAY INSTRUCTIONS:

Display “, also known as {STATE NAME FOR MEDICAID PROGRAM},” and “{STATE NAME FOR MEDICAID PROGRAM}” if state name for Medicaid is not “Medicaid”.

Otherwise display "Medicaid"

QUESTION TEXT:

Medicaid {, also known as {STATE NAME FOR MEDICAID PROGRAM}}, is a state program for low-income people or for people on public assistance. Sometimes people with very large medical bills are also covered by Medicaid.

{Are you/Is SP} now covered by {Medicaid/{STATE NAME FOR MEDICAID PROGRAM}}?

CODES

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

PROGRAMMER INSTRUCTIONS:

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.

IP5

ip5covtricar

R5 IP5 COVERED BY TRICARE

QUESTION TEXT:

TRICARE is a health care program for active duty and retired members of the uniformed Armed Forces, their families, and survivors.

{Are you/Is SP} now covered by TRICARE?

CODES

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

BOX IP5A

BOX IP5A

NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to IP6.

Else if LAST INT IP6 = 1 (YES), go to IP5A.

Otherwise, go to IP6

IP5A

ip5nginslast

R5 IP5A HAVE LTC INS FROM LAST INT

QUESTION TEXT:

At the time of the last interview ({LAST INT MONTH, DAY, AND YEAR}), {you/SP} had insurance that paid for a year or more of care in a nursing home, assisted living, or in {your/his/her} home. {Do you/Does {he/she}} still have this insurance?

CODES

- | | | |
|----|--------------------------------------|------------|
| 1 | YES | IP7 |
| 2 | NO | SECTION LF |
| 90 | LAST INTERVIEW INFORMATION INCORRECT | |
| | REFUSED | SECTION LF |
| | DON'T KNOW | SECTION LF |

IP6**ip5nginsnurs**

R5 IP6 NONGOV INSR FOR NURS HOME

QUESTION TEXT:

Not including government programs, {do you/does SP} have any insurance that would pay for a year or more of care in a nursing home, assisted living, or in {your/his/her} home?

CODES

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

IP7a**ip5typcarco1**

R5 IP7 LTC INS NURSNG HOME COVD

ip5typcarco2

R5 IP7 LTC INS ASSISTD LVNG COVD

ip5typcarco3

R5 IP7 LTC INS HOME HEALTH COVD

QUESTION TEXT:

Which types of care are covered by {your/SP's} policy? Care in: a nursing home, assisted living, or care in {your/his/her} home?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	NURSING HOME CARE
2	ASSISTED LIVING
3	CARE BY HOME HEALTH PROVIDERS IN HOME
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

IP8**ip5paypremms**

R5 IP8 HOW MUCH PAY IN PREMIUMS

QUESTION TEXT:

SHOW CARD IP1

For the year ending December {CURRENT YEAR-1}, how much altogether did {you/SP} pay in premiums? Would you say

CODES

1	less than \$1,000,
2	\$1,000 to less than \$2,000,
3	\$2,000 to less than \$3,000,
4	\$3,000 to less than \$5,000, or
5	\$5,000 or more?
	REFUSED
	DON'T KNOW

BOX IP9**BOXIP9**

NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to IP9.

Otherwise, go to Section LF – Labor Force.

IP9

ip5longhadpl

R5 IP9 HOW LONG HAD THIS POLICY

QUESTION TEXT:

How long {have you/has SP} had this policy?

INDICATE RESPONSE UNIT

CODES

1	NUMBERS OF YEARS	IP9A
2	AGE	IP9B
	REFUSED	SECTION LF
	DON'T KNOW	SECTION LF

IP9A

ip5numyears

R5 IP9A NUMBER OF YEARS

QUESTION TEXT:

ENTER NUMBER OF YEARS SP HAS HAD POLICY

ENTER ZERO IF LESS THAN 1 YEAR

ENTER NUMBER

Range

0 to 40

PROGRAMMER INSTRUCTIONS:

Range 0-40

Go to Section LF – Labor Force

IP9B

ip5agepurpol

R5 IP9B AGE WHEN PURCHSD POLICY

QUESTION TEXT:

ENTER AGE OF SP WHEN PURCHASED POLICY

ENTER NUMBER

Range

30 to 110

Soft Range

40 to 90

PROGRAMMER INSTRUCTIONS:

Hard range 30-110

Soft range 40-90

Go to Section LF – Labor Force

NHATS Round 5

Section LF [LABOR FORCE]

Sequence: 36

LF1PRE

LP1PRE

NOT ON FILE

QUESTION TEXT:

We have some questions about {you/SP} and {your/his/her} family to help us understand how well people are managing financially these days.

PRESS 1 AND ENTER TO CONTINUE

BOX LF1

BOX LF1

NOT ON FILE

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

Else, if FACILITY flag=1 (YES) and PA17 <> 1 (WORKED IN LAST MONTH), go to BOX LF13.

Otherwise, go to LF1.

LF1

If5workfpay

R5 LF2 WORKED FOR PAY REENTLY

DISPLAY INSTRUCTIONS:

If TODAY'S date is a Saturday, display "beginning on Sunday {MONTH, DAY OF SUNDAY PRIOR TO INTERVIEW}" and "today"

If TODAY'S date is not a Saturday, display "on Sunday {MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE}" and "on Saturday {MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE}"

QUESTION TEXT:

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

CODES

1	YES	LF4
2	NO	
3	RETIRED/DON'T WORK ANYMORE	BOX LF11
	REFUSED	
	DON'T KNOW	

LF2

If5abstlstwk

R5 LF2 ABSENT FRM JOB LAST WEEK

QUESTION TEXT:

{Do you/Does SP} have a job from which {you were/{he/she} was} absent last week because of illness, vacation, or some other reason?

CODES

1	YES	LF4
2	NO	
3	RETIRED/DON'T WORK ANYMORE	BOX LF11
	REFUSED	BOX LF11
	DON'T KNOW	BOX LF11

LF3**If5wrkplstmn**

R5 LF3 WORK FOR PAY IN LST MONTH

QUESTION TEXT:

{Now think about last month, that is {MONTH BEFORE INTERVIEW MONTH}. Did {you/SP} do any work for pay at any time in the last month?

CODES

1	YES	LF8
2	NO	BOX LF11
	REFUSED	BOX LF11
	DON'T KNOW	BOX LF11

LF4**If5mrthnonjb**

R5 LF4 MOR THN ONE JOB LAST WEEK

QUESTION TEXT:

Last week, did {you/SP} have more than one job, including part-time, evening, or weekend work?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

LF5**If5hrswkwork**

R5 LF5 HRS PR WEEK WORK MAIN JOB

DISPLAY INSTRUCTIONS:

If LF4=1 (YES), display “main job” and “By main job, I mean the job at which {you work/{he/she} works} the most hours.”

Otherwise, display “job”.

QUESTION TEXT:

How many hours per week {do you/does SP} usually work at {your/his/her} {job/main job}? {By main job, I mean the job at which {you work/{he/she} works} the most hours.}

ENTER NUMBER OF HOURS USUALLY WORK

IF NUMBER OF HOURS VARY EACH WEEK, ENTER 97

ENTER NUMBER

Range	1 to 100
REFUSED	LF8
DON'T KNOW	LF8

PROGRAMMER INSTRUCTIONS:

Range: 1-100, and 997.

BOX LF6**BOX LF6**

NOT ON FILE

If LF2=1 (YES, ABSENT LAST WEEK), go to LF7.
Otherwise go to LF6.

LF6**If5hrwrkltwk**

R5 LF6 HOURS WORK LAST WEEK

QUESTION TEXT:

How many hours did {you/SP} work last week?

ENTER NUMBER OF HOURS

ENTER NUMBER

Range	1 to 100
REFUSED	LF8
DON'T KNOW	LF8

PROGRAMMER INSTRUCTIONS:

ALL RESPONSES SKIP TO LF8

LF7**If5hrwrklstw****R5 LF7 HOW MNY HOURS DID YOU WRK****QUESTION TEXT:**

You said {you were/SP was} absent from work last week. How many hours did {you/he/she} work the last week {you were/{he/she} was} at work?

ENTER NUMBER OF HOURS

ENTER NUMBER

Range	1 to 100
REFUSED	
DON'T KNOW	

LF8**If5oftpaid****R5 LF8 HOW OFTN PAID ON MAIN JOB****DISPLAY INSTRUCTIONS:**

If LF4=1 (YES), display "In {your/SP's} main job, {are you/is {he/she}}"

Otherwise, display "Are you/Is SP".

QUESTION TEXT:

{{Are you/Is SP} /In {your/SP's} main job, {are you/is {he/she}}}paid every week, every two weeks, two times a month, or on some other schedule?

CODES

1	EVERY WEEK	LF9
2	EVERY TWO WEEKS	LF9
3	TWO TIMES A MONTH	LF9
4	ONCE A MONTH	LF9
5	DAILY	LF9
91	OTHER SCHEDULE (SPECIFY)	LF9
	REFUSED	LF9
	DON'T KNOW	LF9

LF8A**LF8A****NOT ON FILE****QUESTION TEXT:**

SPECIFY OTHE PAYMENT SCHEDULE

ENTER TEXT

Length

25

LF9**If5lstpaychk****R5 LF9 HOW MUCH LAST PAYCHECK****DISPLAY INSTRUCTIONS:**

If LF4=1 (YES), display “for {your/his/her} main job”

QUESTION TEXT:

How much was {your/SP's} last paycheck before taxes and any other deductions {for {your/his/her} main job}?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: If it is easier, you can just tell me how much {you earn/SP earns} per hour or per day.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER PAYCHECK AMOUNT	
2	ENTER PAY PER HOUR	LF9B
3	ENTER PAY PER DAY	LF9C
	REFUSED	BOX LF11
	DON'T KNOW	BOX LF11

LF9A**If5psychkamnt****R5 LF9A PAYCHECK AMOUNT****QUESTION TEXT:**

ENTER PAYCHECK AMOUNT

\$ _____

ENTER NUMBER

Range

1 to 999999

PROGRAMMER INSTRUCTIONS:

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

Go to LF10.

LF9B**If5perhrpay****R5 LF9B PAY PER HOUR****QUESTION TEXT:**

ENTER PAY PER HOUR

\$ _____

ENTER NUMBER

Range

1 to 999.99

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999.99) so that dollar sign is displayed and decimal point is inserted appropriately.

Go to LF10.

LF9C**If5perdaypay****R5 LF9C PAY PER DAY****QUESTION TEXT:**

ENTER PAY PER DAY

\$ _____

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

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

LF10**If5ernfrmwrk****R5 LF10 AMT EARN FRM WRK LST MTH****QUESTION TEXT:**

Now thinking about the month of {CURRENT MONTH -1 MONTH}, how much did {you/SP} earn altogether from any work {you/he/she} did in {CURRENT MONTH -1 MONTH}, before taxes and before any other deductions?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

\$ _____

ENTER NUMBER

Range

1 to 999999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX LF11**BOXLF11****NOT ON FILE**

If NEWSAMPLE flag=1 (YES), go to LF11.
Otherwise, go to BOX LF12.

LF11**If5occupaton****R5 LF11 OCCUPATION MOST OF LIFE**

QUESTION TEXT:

We are interested in the work people did most of their lives. What kind of work was that? (In other words, what was {your/SP's} occupation?)

CODES

1	ENTER OCCUPATION	
2	NEVER WORKED ENTIRE LIFE	BOX LF12
3	HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME	BOX LF12
	REFUSED	BOX LF12
	DON'T KNOW	BOX LF12

LF11A**If5doccptctgy****R5 D LONGEST OCCUPATION CATEGORY****QUESTION TEXT:**

ENTER OCCUPATION DESCRIPTION

ENTER TEXT

Length

150

BOX LF12**BOXLF12****NOT ON FILE**

If NEWSAMPLE flag = 1 (YES) and (LF1 or LF2 or LF3 = 1 (YES)) and (LF11 = 3 (HOMEMAKER), RF, or DK), go to LF12A.
 Else if NEWSAMPLE flag = 1 (YES) and (LF1 or LF2 or LF3 = 1 (YES)), go to LF12.
 Else if LF1 or LF2 or LF3 = 1 (YES), go to LF12A.
 Otherwise, go to BOX LF13.

LF12**If5diffwrknw****R5 LF12 DO THS WRK SOMETHNG DIFF****QUESTION TEXT:**

{Are you/Is SP} doing this kind of work now or {are you/is {he/she}} doing something different?

CODES

1	SAME KIND OF WORK	BOX LF13
2	SOMETHING DIFFERENT	
	REFUSED	BOX LF13
	DON'T KNOW	BOX LF13

LF12A**If5doccup****R5 D CURRENT OCCUPATION CATEGORY****QUESTION TEXT:**

We are interested in the kind of work {you do/SP does} now. What kind of work is that? (In other words, what is {your/his/her} current occupation?)

ENTER OCCUPATION DESCRIPTION

ENTER TEXT

Length
REFUSED

150

DON'T KNOW

BOX LF13

BOX LF13

NOT ON FILE

If [CURRENT INT SP MARITAL STATUS from PERSON ROSTER= 1 (MARRIED) or 2 (LIVING WITH A PARTNER)], go to LF13.

Otherwise, go to Section HP – Home Ownership.

LF13

If5huswifwrk

R5 LF13 HUSB WIFE PARTN PAY WORK

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".

Otherwise display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Did {you/SPOUSE/PARTNER FIRSTNAME LASTNAME} do any work for pay in the month of {CURRENT MONTH-1 MONTH}?

CODES

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

LF14

If5huwpaearn

R5 LF14 HUS WIFE PAR PAY LAT MTH

DISPLAY INSTRUCTIONS:

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

Else if PROXY flag =1 (YES), display "SP's".

Otherwise display "your".

If PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH1=2 (LIVING WITH A PARTNER), display "partner".

Else if PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH5=1 (MALE), display "husband".

Else if PROXY RELATIONSHIP <> 1 (SPOUSE/PARTNER) and HH5=2 (FEMALE), display "wife".

QUESTION TEXT:

In {CURRENT MONTH -1 MONTH}, how much altogether did {you/your/SP's}{husband/wife/partner} earn before taxes and before any other deductions?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

\$ _____

ENTER NUMBER

Range 1 to 999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999,999) so that dollar sign is displayed and commas are inserted appropriately.
Go to Section HP – Home Ownership

Derived Variables from Items in the LF Section	
If5doccptgy	R5 D LONGEST OCCUPATION CATEGORY
If5doccup	R5 D CURRENT OCCUPATION CATEGORY

NHATS Round 5

Section HP [HOME OWNERSHIP]

Sequence: 37

HP1

hp5ownrentot

R5 HP1 OWN RENT OR OTHER

DISPLAY INSTRUCTIONS:

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

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".
Else display "home".

If FACILITY flag=1 (YES) and FACILITY NAME is available, display "{FACILITY NAME/text from HT9b}".
Else if FACILITY flag=1 (YES) and FACILITY NAME is null, display "SP's {ADDRESS1, ADDRESS 2} from PERSON ROSTER".

If FACILITY flag=1 (YES), display "{apartment/unit/suite/room/other} at {FACILITY NAME/SP's {ADDRESS1, ADDRESS 2} from PERSON ROSTER}" and "{or pay a monthly amount to live there}".
Otherwise, display "{own the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}}".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} {own the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}}/{apartment/unit/suite/room/other} at {FACILITY NAME/SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}, rent it {or pay a monthly amount to live there}, or is there some other arrangement?

CODES

1	OWN	
2	RENT (OR PAY MONTHLY AMOUNT)	HP6
3	SOME OTHER ARRANGEMENT	HP5
	REFUSED	HP5
	DON'T KNOW	HP5

HP2

hp5mrtpadoff

R5 HP2 MORTGAGE PAID OFF

DISPLAY INSTRUCTIONS:

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

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Is {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} mortgage

paid off or are monthly mortgage payments still being made?

IF NEEDED: Include any payments on a home equity loan or second mortgage.

CODES

1	PAID OFF	HP4
2	STILL MAKE PAYMENTS	
3	REVERSE MORTGAGE	HP4
	REFUSED	HP4
	DON'T KNOW	HP4

HP3

hp5mthlymort

R5 HP3 MORTGAGE PAYMNT EACH MNTH

QUESTION TEXT:

How much (altogether) is that each month?

ENTER DOLLAR AMOUNT [HP3B]

ENTER NUMBER

Range	1 to 9999
Soft Range	100 to 5000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999

Soft Range: 100-5000

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

HP3A

hp5mortpaymt

R5 HP3A MORTGAGE PAYMENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$250,
2	\$250 TO LESS THAN \$500,
3	\$500 TO LESS THAN \$1,000
4	\$1,000 TO LESS THAN \$3,000
5	\$3,000 TO LESS THAN \$5,000
6	\$5,000 OR MORE?
	REFUSED
	DON'T KNOW

HP3B

hp5whnpayoff

R5 HP3B WHEN EXPCT PAY OFF MORTG

DISPLAY INSTRUCTIONS:

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

Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display

"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} expect to pay off the mortgage(s) within 5 years, 10 years, or longer?

CODES

1	5 YEARS
2	10 YEARS
3	LONGER THAN 10 YEARS
	REFUSED
	DON'T KNOW

HP3C

hp5amtstlowe

R5 HP3C HOW MUCH STILL OWE

DISPLAY INSTRUCTIONS:

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

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

About how much {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} still owe on the mortgage(s)?

IF NEEDED: The nearest \$10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT [HP4]

ENTER NUMBER

Range	1 to 999999
Soft Range	500 to 900000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999999
Soft Range: 500-900000

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

HP3D

hp5amoutowed

R5 HP3D THE AMOUNT OWED IS

QUESTION TEXT:

Is the amount owed...

CODES

- | | |
|---|-------------------------------------|
| 1 | less than \$50,000, |
| 2 | \$50,000 to less than \$100,000, or |
| 3 | \$100,000 or more? |
| | REFUSED |
| | DON'T KNOW |

HP4**hp5homevalue**

R5 HP4 PRESENT VALUE OF HOME

QUESTION TEXT:

What is the present value of this home? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?

IF NEEDED: Your best guess or the nearest \$10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT [SECTION IA]

ENTER NUMBER

Range	1 to 999999
Soft Range	500 to 900000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999999
Soft Range: 500-900000

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

HP4A**hp5homvalamt**

R5 HP4A HOME VALUE AMOUNT

QUESTION TEXT:

SHOW CARD HP2

Please look at this card and tell me which is closest.

CODES

LESS THAN \$50,000 SECTION IA

- | | | |
|---|----------------------------------|------------|
| 2 | \$50,000 TO LESS THAN \$75,000 | SECTION IA |
| 3 | \$75,000 TO LESS THAN \$100,000 | SECTION IA |
| 4 | \$100,000 TO LESS THAN \$200,000 | SECTION IA |
| 5 | \$200,000 TO LESS THAN \$300,000 | SECTION IA |
| 6 | \$300,000 TO LESS THAN \$500,000 | SECTION IA |
| 7 | \$500,000 TO LESS THAN \$750,000 | SECTION IA |
| 8 | \$750,000 OR MORE | SECTION IA |
| | REFUSED | SECTION IA |
| | DON'T KNOW | SECTION IA |

HP5**hp5payrent**

R5 HP5 DO YOU PAY RENT

DISPLAY INSTRUCTIONS:

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

If CURRENT INT SP MARITAL STAUS from PERSON ROSTER = 1 (MARRIED) OR 2 (LIVING WITH A PARTNER), display "or
{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} pay to
live here?

CODES

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

HP6**hp5rentamt**

R5 HP6 RENT PAID EACH MONTH

QUESTION TEXT:

How much is that each month?

ENTER DOLLAR AMOUNT [BOX HP7]

ENTER NUMBER

Range	0 to 9999
Soft Range	1 to 3000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 0-9999
Soft Range: 1-3000

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

HP6A**hp5rentamt**

R5 HP6A RENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$250
2	\$250 TO LESS THAN \$500
3	\$500 TO LESS THAN \$1,000
4	\$1,000 TO LESS THAN \$3,000
5	\$3,000 TO LESS THAN \$5,000
6	\$5,000 OR MORE

REFUSED
DON'T KNOW

BOX HP7

BOX HP7

NOT ON FILE

If HP6>=\$750 or HP6a= 4 (\$1,000 TO LESS THAN \$3,000), 5 (\$3,000 TO LESS THAN \$5,000), or 6 (\$5,000 OR MORE), go to SECTION IA – Income and Assets.
Otherwise, go to HP7.

HP7

hp5sec8pubsn

R5 HP7 HME SEC 8 PUBL/SENIOR HOUS

QUESTION TEXT:

Is this home in Section 8 public housing or housing for low-income seniors?

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section IA– Income and Assets.

NHATS Round 5

Section IA [INCOME AND ASSETS]

Sequence: 38

IA1PRE

IA1PRE

NOT ON FILE

We are interested in how people are getting along financially these days. The next few questions are about income and other resources. Your responses can help us understand how people manage financially as they age.

Please feel free to refer to any records or other persons that may be of assistance in answering these questions.

Many of these questions ask about "last month." By last month, I mean in {CURRENT MONTH - 1}.

PRESS 1 AND ENTER TO CONTINUE

IA1

ia5recsspa1

R5 IA1 SP REC SOCIAL SECURITY

ia5recsspa2

R5 IA1 SPOUSE PART REC SOC SEC

ia5recsspa3

R5 IA1 NO SOC SECURTY PAYMNT REC

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (yes) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you". Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

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

Display "in the last month" in underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Social Security retirement and/or Railroad Retirement payments in the last month (that is in {CURRENT MONTH - 1})?

{SELECT ALL THAT APPLY}

CODES

Code All That Apply

- | | |
|---|---|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message

“INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

BOX IA2**BOXIA2**

NOT ON FILE

If IA1 <> 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

IA2**ia5howrecssp**

R5 IA2 HOW REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "Do you".
Otherwise, display "Does SP".

QUESTION TEXT:

{Do you/Does SP} get payments by direct deposit, on a prepaid card, or by mail?

CODES

1	MAIL
2	DIRECT DEPOSIT
3	PREPAID CARD
	REFUSED
	DON'T KNOW

IA3A**ia5msrtrecss**

R5 IA3A MTH STRD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “MONTH” in underlined text”.

QUESTION TEXT:

What month and year did {you/SP} start receiving Social Security?

ENTER MONTH

ENTER NUMBER

Range	1 to 12
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

IA3B**ia5yrstressp**

R5 IA3B YR STRTD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “YEAR” in underlined text”.

QUESTION TEXT:

[What month and year did {you/SP} start receiving Social Security?]

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

IA4	ia5recssils1	R5 IA4 SP RECEIVD SSI LAST MONTH
	ia5recssils2	R5 IA4 SPOUSE PRT REC SSI LST MO
	ia5recssils3	R5 IA4 NO SSI RECEIVD LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

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

Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive
Supplemental Security Income, which is also called SSI, last month?

IF NEEDED: These are monthly government payments to lower-income people in need.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP RECEIVED PAYMENT FROM SOURCE
2	YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
3	NO PAYMENT RECEIVED FROM THIS SOURCE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message
"INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the
screen.

IA5	ia5rvapayls1	R5 IA5 SP REC PAY FRM VA LAST MO
	ia5rvapayls2	R5 IA5 SPOUS PA REC VA PAY LSTMO
	ia5rvapayls3	R5 IA5 NO VA PAY REC LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

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

Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive
any payments from the Veteran's Administration (U.S. Department of Veterans Affairs) last month
related to military service or veteran survivor's benefits?

{SELECT ALL THAT APPLY}

CODES**Code All That Apply**

- | | |
|---|---|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT
FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when
leaving the screen.

IA6PRE
IA6PRE
NOT ON FILE

People sometimes have other retirement income. This may be from pensions or retirement plans related
to their jobs.

PRESS 1 AND ENTER TO CONTINUE

IA6
ia5penjobou1
R5 IA6 SP HAS PENSION PLAN
ia5penjobou2
R5 IA6 SPOUSE HAS PENSION PLAN
ia5penjobou3
R5 IA6 NO PENSION PLAN
DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS PENSION".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any pension plans that were a job-related or union benefit?

IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan.

{SELECT ALL THAT APPLY}

CODES

Code All That Apply

- | | |
|---|---------------------------------|
| 1 | YES, SP HAS PENSION |
| 2 | YES, SPOUSE/PARTNER HAS PENSION |
| 3 | NO PENSION |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PENSION) selected and [1 (SP PENSION) or 2 (SPOUSE PENSION)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA7	ia5iraothac1	R5 IA7 SP HAS IRA OTH RETIRE ACC
	ia5iraothac2	R5 IA7 SPOUSE HAS IRA OTHR ACC
	ia5iraothac3	R5 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY"
and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS".

QUESTION TEXT:

SHOW CARD IA1

Please look at the types of retirement plans on this card. {Do you/Does SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of these?

IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your
paycheck, and your employer may match some of your contribution.

IF NEEDED: IRAs (Individual Retirement Accounts) are a type of plan you set up on your own.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS
2	YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS
3	NO PLANS REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO ACCT) selected and [1 (SP ACCT) or 2 (SPOUSE ACCT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA8	ia5mutfdstk1	R5 IA8 SP OWNS MUTUAL FUND STOCK
	ia5mutfdstk2	R5 IA8 SPOUSE OWNS FUNDS STOCK
	ia5mutfdstk3	R5 IA8 SP SPOUSE OWN FUNDS STOCK
	ia5mutfdstk4	R5 IA8 NO FUNDS OR STOCK OWNED

DISPLAY INSTRUCTIONS:

If IA7 = 1 (SP RETIREMENT PLAN) or 2 (SPOUSE RETIREMENT ACCT), display "Not including the retirement accounts we have already talked about, {do you/does SP}".
Otherwise, display "Do you/Does SP".

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
Otherwise, display "Does SP" or "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

{Not including the retirement accounts we have already talked about, {do you/does SP}/{Do you/Does SP}}{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any mutual funds or stocks?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA9	ia5ownbond1	R5 IA9 SP OWNS BONDS
	ia5ownbond2	R5 IA9 SPOUSE OWNS BONDS
	ia5ownbond3	R5 IA9 SP SPOUSE OWN BONDS
	ia5ownbond4	R5 IA9 NO BONDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY"
and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE
ASSET JOINTLY".

QUESTION TEXT:

Not including what we've already talked about, {do you/does SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any bonds, such as Government
Savings Bonds, corporate, municipal, or other types of bonds?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when
leaving the screen.

IA10PRE	IA10PRE	NOT ON FILE
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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	ia5bnkaccdd1	R5 IA10 SP OWNS CHECK ACCT
	ia5bnkaccdd2	R5 IA10 SPOUSE OWNS CHECK ACCT

ia5bnkacccd3	R5 IA10 SP SPOUSE OWN CHECK ACCT
ia5bnkacccd4	R5 IA10 NO CHECK ACCT OWNED
ia5bnkacccd5	R5 IA10 SP OWNS SAVINGS ACCT
ia5bnkacccd6	R5 IA10 SPOUSE OWNS SAVING ACCT
ia5bnkacccd7	R5 IA10 SP SPOUSE OWN SAVNG ACT
ia5bnkacccd8	R5 IA10 NO SAVINGS ACCT OWNED
ia5bnkacccd9	R5 IA10 SP OWNS CDS
ia5bnkacccc10	R5 IA10 SPOUSE OWNS CDS
ia5bnkacccc11	R5 IA10 SP SPOUSE OWN CDS
ia5bnkacccc12	R5 IA10 NO CDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”.
Otherwise, display “does SP”.

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP
FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY”
and response option 2, “YES, SPOUSE/PARTNER HAS ASSET” and 3, “YES, SP AND SPOUSE/PARTNER HAVE
ASSET JOINTLY”.

QUESTION TEXT:

Not counting what we’ve already talked about, {do you/does SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have ...
RESPONSE [1] A. a checking account?
RESPONSE [2] B. a savings account or money market account?
RESPONSE [3] C. certificates of deposit?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSETS OF THIS TYPE REFUSED DON’T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving
the screen.

IA13	ia5realestt1	R5 IA13 SP OWNS REAL ESTATE
	ia5realestt2	R5 IA13 SPOUSE OWNS REAL ESTATE
	ia5realestt3	R5 IA13 SP SPOUSE OWN REAL ESTTE

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and
response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET
JOINTLY".

If HP1 = 1 (OWNS HOME), display "besides {your/SP}'s home".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own
a business, a farm, or any other real estate {besides {your/SP's} home}, including land or rental
properties?

{SELECT ALL THAT APPLY}

CODES**Code All That Apply**

- | | |
|---|--|
| 1 | YES, SP HAS ASSET |
| 2 | YES, SPOUSE/PARTNER HAS ASSET |
| 3 | YES, SP AND SPOUSE/PARTNER HAVE ASSET
JOINTLY |
| 4 | NO ASSETS OF THIS TYPE
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving
the screen.

IA14PRE**IA14PRE**

NOT ON FILE

We now have a few questions which are important for understanding how people manage
financially as they age.

PRESS 1 AND ENTER TO CONTINUE

BOX IA14**BOXIA14**

NOT ON FILE

If IA1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IA14.

Else if IA1 = 1 (SP RECEIVED SS/RR), go to IA15A.

Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IA16A.

Otherwise, go to BOX IA17.

IA14**ia5ssrrpymnt**

R5 IA14 RECENT MTHLY SS RR PYMNT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

First, what was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA14A**ia5ssrrjtamt**

R5 IA14A JOINT SS RR AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA14A = 1-9999, go to BOX IA17

IA14B**ia5ssrrjtest**

R5 IA14B ESTMT JOINT SSRR AMOUNT

QUESTION TEXT:

SHOW CARD IA2

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$1,300,	BOX IA17
2	\$1,300 TO LESS THAN \$1,700	BOX IA17
3	\$1,700 TO LESS THAN \$2,200	BOX IA17
4	\$2,200 TO LESS THAN \$2,600	BOX IA17
5	\$2,600 OR MORE?	BOX IA17

REFUSED
DON'T KNOW

BOX IA17
BOX IA17

IA15A

ia5ssrrspamt

R5 IA15A SP SS RR AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES), display "your".
Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA15A = 1-9999, go to BOX IA16A

IA15B

ia5ssrrspest

R5 IA15B ESTIMATE SP SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Please look at this card and tell me which is closest.

CODES

- | | |
|---|------------------------------|
| 1 | LESS THAN \$700, |
| 2 | \$700 TO LESS THAN \$1,000 |
| 3 | \$1,000 TO LESS THAN \$1,300 |
| 4 | \$1,300 TO LESS THAN \$1,600 |
| 5 | \$1,600 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA16A

BOXIA16A

NOT ON FILE

If IA14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA16A.
Otherwise, go to BOX IA17.

IA16A

ia5ssrrptamt

R5 IA16A PARTNER SS RR AMT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s”.

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA16A = 1-9999, go to BOX IA17

IA16B

ia5ssrrptest

R5 IA16B ESTIMT PARTNR SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Please look at this card and tell me which is closest.

CODES

1 LESS THAN \$700,
2 \$700 TO LESS THAN \$1,000
3 \$1,000 TO LESS THAN \$1,300
4 \$1,300 TO LESS THAN \$1,600
5 \$1,600 OR MORE
REFUSED
DON'T KNOW

BOX IA17

BOXIA17

NOT ON FILE

If IA4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IA17.
Else if IA4 = 1 (SP RECEIVED SSI), go to IA18A.
Else if IA4 = 2 (SPOUSE RECEIVED SSI), go to IA19A.
Otherwise, go to BOX IA20.

IA17

ia5ssipymnt

R5 IA17 RECENT MTHLY SSI PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA17A

ia5ssijtamt

R5 IA17A JOINT SSI AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.

Do not display the phrase 'Enter Number'.

If IA17A = 1-9999, go to BOX IA20.

IA17B

ia5ssijtest

R5 IA17B ESTIMATE JOINT SSI AMT

QUESTION TEXT:

SHOW CARD IA4

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$300,	BOX IA20
2	\$300 TO LESS THAN \$700,	BOX IA20
3	\$700 TO LESS THAN \$1000	BOX IA20
4	\$1000 OR MORE	BOX IA20
	REFUSED	BOX IA20
	DON'T KNOW	BOX IA20

IA18A**ia5ssispamt****R5 IA18A SP SSI AMOUNT****DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES), display
"your". Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly SSI payment (for the month of {CURRENT MONTH
- 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
understand how people manage financially as they age and what effect this might have on their
health.

ENTER SP SSI AMOUNT

ENTER NUMBER

Range

1 to 9999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA18A = 1-9999, go to BOX IA19A.

IA18B**ia5ssispest****R5 IA8B ESTIMATE SP SSI AMOUNT****QUESTION TEXT:**

SHOW CARD IA5

Please look at this card and tell me which is closest.

CODES

- | | |
|---|--------------------------|
| 1 | LESS THAN \$100, |
| 2 | \$100 TO LESS THAN \$200 |
| 3 | \$200 TO LESS THAN \$400 |
| 4 | \$400 TO LESS THAN \$700 |
| 5 | \$700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA19A**BOXIA19A****NOT ON FILE**

If IA17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA19A.
Otherwise, go to BOX IA20.

IA19A**ia5ssiptamt****R5 IA19A PARTNR SSI AMOUNT****DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}s”.

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}s} most recent monthly SSI payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don’t need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA19A = 1-9999, go to BOX IA20.

IA19B**ia5ssiptest****R5 IA19B ESTIMATE PARTNR SSI AMT****QUESTION TEXT:**

SHOW CARD IA5

Please look at this card and tell me which is closest.

CODES

1 LESS THAN \$100,
2 \$100 TO LESS THAN \$200
3 \$200 TO LESS THAN \$400
4 \$400 TO LESS THAN \$700
5 \$700 OR MORE
REFUSED
DON’T KNOW

BOX IA20**BOX IA20****NOT ON FILE**

If IA5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IA20.
Else if IA5 = 1 (SP RECEIVED VA), go to IA21A.
Else if IA5 = 2 (SPOUSE RECEIVED VA), go to IA22A.
Otherwise, go to BOX IA23.

IA20**ia5vapymnt****R5 IA20 RECENT MNTHLY VA PAYMENT**

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA20A**ia5vajtamt**

R5 IA20A JOINT VA AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA20A = 1-9999, go to BOX IA23.

IA20B**ia5vajtest**

R5 IA20B ESTIMAT JOINT VA AMOUNT

QUESTION TEXT:

SHOW CARD IA6

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$1000,	BOX IA23
2	\$1000 TO LESS THAN \$1,400	BOX IA23
3	\$1,400 TO LESS THAN \$1,800	BOX IA23
4	\$1,800 TO LESS THAN \$2,200	BOX IA23
5	\$2,200 OR MORE	BOX IA23
	REFUSED	BOX IA23

DON'T KNOW

BOX IA23

IA21A

ia5vaspamt

R5 IA21A SP VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display
"your". Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP VA AMOUNT

ENTER NUMBER

Range

1 to 9999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA21A = 1-9999, go to BOX IA22A.

IA21B

ia5vaspest

R5 IA21B ESTIMATE SP VA AMOUNT

QUESTION TEXT:

SHOW CARD IA7

Please look at this card and tell me which is closest.

CODES

- 1 LESS THAN \$500
- 2 \$500 TO LESS THAN \$700
- 3 \$700 TO LESS THAN \$900
- 4 \$900 TO LESS THAN \$1,100
- 5 \$1,100 OR MORE
- REFUSED
- DON'T KNOW

BOX IA22A

BOX IA22A

NOT ON FILE

If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22A.
Otherwise, go to BOX IA23.

IA22A**ia5vaptamt****R5 IA22A PARTNER VA AMOUNT****DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s”.

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA22A = 1-9999, go to BOX IA23.

IA22B**ia5vaptest****R5 IA22B ESTIMATE PARTNR VA AMT****QUESTION TEXT:**

SHOW CARD IA7

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$700
3	\$700 TO LESS THAN \$900
4	\$900 TO LESS THAN \$1,100
5	\$1,100 OR MORE
	REFUSED
	DON'T KNOW

BOX IA23**BOX IA23****NOT ON FILE**

If IA6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IA23.
Else if IA6 = 1 (SP RECEIVED PENSION PLAN), go to IA24A.
Else if IA6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IA25A.
Otherwise, go to BOX IA26.

IA23

ia5penpymt

R5 IA23 RCNT MTH JOBPENSION PYMT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA23A**ia5penjamt**

R5 IA23A JOINT JOB PENSION AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA23A = 1-9999, go to BOX IA26.

IA23B**ia5penjtest**

R5 IA23B EST JOINT JOB PENSN AMT

QUESTION TEXT:

SHOW CARD IA8

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$600,	BOX IA26
2	\$600 TO LESS THAN \$1,300	BOX IA26
3	\$1,300 TO LESS THAN \$2,100	BOX IA26
4	\$2,100 TO LESS THAN \$5,900	BOX IA26

5	\$5,900 OR MORE	BOX IA26
	REFUSED	BOX IA26
	DON'T KNOW	BOX IA26

IA24A	ia5penspamt	R5 IA24A SP JOB PENSION AMOUNT
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DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have" and your".
Otherwise, display "SP has" and "SP's".

If IA23=2, (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/SP has} a job-related pension plan." and "this".

QUESTION TEXT:

{You told me earlier that {you have/SP has} a job-related pension plan.} In all, how much was received from
{your/SP's} job-related /this} pension plan in the last month, before any federal or state taxes were taken out
(for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
understand how people manage financially as they age and what effect this might have on their health.

ENTER SP PENSION PLAN AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA24A = 1-9999, go to BOX IA25A.

IA24B	ia5penspest	R5 IA24B EST SP JOB PENSION AMT
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QUESTION TEXT:

SHOW CARD IA9

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$400
2	\$400 TO LESS THAN \$900
3	\$900 TO LESS THAN \$1,600
4	\$1,600 TO LESS THAN \$3,800
5	\$3,800 OR MORE
	REFUSED
	DON'T KNOW

BOX IA25A	BOX IA25A	NOT ON FILE
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If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25A.
Otherwise, go to BOX IA26.

IA25A

ia5pentamt

R5 IA25A PARTNR JOB PENSN AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has" and "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If IA23 = 2 (ENTER SP and SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan" and "this".

QUESTION TEXT:

{You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan.} In all, how much was received from {{your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} job-related/this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

IA25B

ia5penptest

R5 IA25B EST PARTNR JOB PEN AMT

QUESTION TEXT:

SHOW CARD IA9

Please look at this card and tell me which is closest.

CODES

- | | |
|---|------------------------------|
| 1 | LESS THAN \$400 |
| 2 | \$400 TO LESS THAN \$900 |
| 3 | \$900 TO LESS THAN \$1,600 |
| 4 | \$1,600 TO LESS THAN \$3,800 |
| 5 | \$3,800 OR MORE |
| | REFUSED |
| | DON'T KNOW |

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA26.
 Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA27A.
 Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA28A.
 Otherwise, go to BOX IA35.

IA26**ia5retworth**

R5 IA26 RETIREMENT ACCOUNT WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
 Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
 Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA26A**ia5retjtwrt**

R5 IA26A JOINT RETIR ACCT WORTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
 Do not display the phrase 'Enter Number'.

If IA26A = 1-9999999, go to BOX IA29.

IA26B**ia5retjtest****R5 IA26B EST JOINT RET ACCT WRTH**

QUESTION TEXT:

SHOW CARD IA10

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$34,000	BOX IA29
2	\$34,000 TO LESS THAN \$82,000	BOX IA29
3	\$82,000 TO LESS THAN \$175,000	BOX IA29
4	\$175,000 TO LESS THAN \$413,000	BOX IA29
5	\$413,000 OR MORE	BOX IA29
	REFUSED	BOX IA29
	DON'T KNOW	BOX IA29

IA27A**ia5retspwrt****R5 IA27A SP RETIREMENT ACCT WRTH**

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/SP has} retirement accounts.
In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA27A = 1-9,999,999, go to BOX IA28A.

IA27B**ia5retspst****R5 IA27B EST SP RET ACCT WORTH**

QUESTION TEXT:

SHOW CARD IA11

Please look at this card and tell me which is closest.

CODES

- | | |
|---|---------------------------------|
| 1 | LESS THAN \$20,000 |
| 2 | \$20,000 TO LESS THAN \$47,000 |
| 3 | \$47,000 TO LESS THAN \$92,000 |
| 4 | \$92,000 TO LESS THAN \$218,000 |
| 5 | \$218,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA28A

BOXIA28A

NOT ON FILE

If IA26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA28A.
Otherwise, go to BOX IA29.

IA28A

ia5retptwrt

R5 IA28A PRTNR RET ACCT WORTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA28A = 1-999999, go to BOX IA29.

IA28B

ia5retptest

R5 IA28B EST PARTNR ACCT WORTH

QUESTION TEXT:

SHOW CARD IA11

Please look at this card and tell me which is closest.

CODES

- | | |
|---|---------------------------------|
| 1 | LESS THAN \$20,000 |
| 2 | \$20,000 TO LESS THAN \$47,000 |
| 3 | \$47,000 TO LESS THAN \$92,000 |
| 4 | \$92,000 TO LESS THAN \$218,000 |
| 5 | \$218,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA29

BOX IA29

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA29.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA30A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA31A.
Otherwise, go to BOX IA35.

IA29

ia5rtlmwdrw

R5 IA29 RETRMNT WDRW AMT LST MTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "Last month" in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA29A

ia5rtlmjtwdr

R5 IA29A JOINT RET WDRW LST MTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999

Do not display the phrase 'Enter Number'.

If IA29A = 0-99,999, go to BOX IA32.

IA29B**ia5rtlmjtest**

R5 IA29B EST JONT RET WDR LS MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA12

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$200	BOX IA32
2	\$200 TO LESS THAN \$500	BOX IA32
3	\$500 TO LESS THAN \$1,000	BOX IA32
4	\$1,000 TO LESS THAN \$2,500	BOX IA32
5	\$2,500 OR MORE	BOX IA32
	REFUSED	BOX IA32
	DON'T KNOW	BOX IA32

IA30A**ia5rtlmspwr**

R5 IA30A SP RET WDRWL LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "Last month" in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/SP} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 99999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999
Do not display the phrase 'Enter Number'.
If IA30A = 0-99999, go to BOX IA31A.

IA30B

ia5rtlmspest

R5 IA30B EST SP RET WDR LST MNTH

QUESTION TEXT:

SHOW CARD IA13

Please look at this card and tell me which is closest.

CODES

- | | |
|---|----------------------------|
| 1 | LESS THAN \$100 |
| 2 | \$100 TO LESS THAN \$300 |
| 3 | \$300 TO LESS THAN \$700 |
| 4 | \$700 TO LESS THAN \$1,700 |
| 5 | \$1,700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA31A

BOX IA3A

NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31A.
Otherwise, go to BOX IA32.

IA31A

ia5rtlmptwdr

R5 IA31A PARTNR RET WDR LST MTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you” and “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}” and “{his/her}”.

Display “Last month” in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don’t need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999

Do not display the phrase 'Enter Number'.
If IA31A = 0-99,999, go to BOX IA32.

IA31b

ia5rtlmpst

R5 IA31B EST PARTNR WDR LST MTH

QUESTION TEXT:

SHOW CARD IA13

Please look at this card and tell me which is closest.

CODES

- 1 LESS THAN \$100
- 2 \$100 TO LESS THAN \$300
- 3 \$300 TO LESS THAN \$700
- 4 \$700 TO LESS THAN \$1,700
- 5 \$1,700 OR MORE
- REFUSED
- DON'T KNOW

BOX IA32

BOXIA32

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA32.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA33A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA34A.
Otherwise, go to BOX IA35.

IA32

ia5rtyrwdrw

R5 IA32 RETRMNT WDRWL AMT LST YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- 1 ENTER COMBINED AMOUNT
 - 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS
SEPARATELY
- IA33A
IA32B

REFUSED
DON'T KNOW

IA32B

IA32A

ia5rtyrjtamt

R5 IA32A AMT JOINT RET WDR LS YR

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA32A = 0-9999999, go to BOX IA35.

IA32B

ia5rtyrjtest

R5 IA32B EST JOINT RET WDR LS YR

QUESTION TEXT:

SHOW CARD IA14

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$2,400	BOX IA35
2	\$2,400 TO LESS THAN \$6,000	BOX IA35
3	\$6,000 TO LESS THAN \$12,000	BOX IA35
4	\$12,000 TO LESS THAN \$30,000	BOX IA35
5	\$30,000 OR MORE	BOX IA35
	REFUSED	BOX IA35
	DON'T KNOW	BOX IA35

IA33A

ia5rtyrspamt

R5 IA33A SP AMT RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA33A = 0-9999999, go to BOX IA34A.

IA33B**ia5rtyspest****R5 IA33B EST SP RCVWDR RET LS YR****QUESTION TEXT:**

SHOW CARD IA15

Please look at this card and tell me which is closest.

CODES

- | | |
|---|-------------------------------|
| 1 | LESS THAN \$1,200 |
| 2 | \$1,200 TO LESS THAN \$3,600 |
| 3 | \$3,600 TO LESS THAN \$8,400 |
| 4 | \$8,400 TO LESS THAN \$20,400 |
| 5 | \$20,400 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA34A**BOX IA34A****NOT ON FILE**

If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34A.
Otherwise, go to BOX IA35.

IA34A**ia5rtyrptamt****R5 IA34A PARTNR RCVWDR RET LS YR****DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you” and “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}” and “{his/her}”.

Display “last year” in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR – 1}), how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA34A = 0-9999999, go to BOX IA35.

IA34B**ia5rtyrptest****R5 IA34B EST PRTNR WDR RET LS YR****QUESTION TEXT:**

SHOW CARD IA15

Please look at this card and tell me which is closest.

CODES

- | | |
|---|--|
| 1 | LESS THAN \$1,200 |
| 2 | \$1,200 TO LESS THAN \$3,600 |
| 3 | \$3,600 TO LESS THAN \$8,400 |
| 4 | \$8,400 TO LESS THAN \$20,400 |
| 5 | \$20,400 OR MORE REFUSED
DON'T KNOW |

BOX IA35**BOX IA35****NOT ON FILE**

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), go to IA35.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS), go to IA36A.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

IA35**ia5skbdwrth****R5 IA35 NONRETR STKS BNDS WRTH****DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME

LASTNAME} own {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA35A

ia5skbdjtwrt

R5 IA35A JOINT STKS BNDS WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE'S/PARTNER MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999

Do not display the phrase 'Enter Number'.

If IA35A = 1-9999999, go to BOX IA38.

BOX IA35B

BOXIA35B

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS), go to IA35b.
Otherwise, go to IA35c.

IA35b

ia5skbdjtest

R5 IA35B EST JOINT STKS BNDS WRT

QUESTION TEXT:

SHOW CARD IA16

Please look at this card and tell me which is closest.

CODES

- | | | |
|---|---------------------------------|----------|
| 1 | LESS THAN \$9,000 | BOX IA38 |
| 2 | \$9,000 TO LESS THAN \$18,000 | BOX IA38 |
| 3 | \$18,000 TO LESS THAN \$93,000 | BOX IA38 |
| 4 | \$93,000 TO LESS THAN \$350,000 | BOX IA38 |
| 5 | \$350,000 OR MORE | BOX IA38 |
| | REFUSED | BOX IA38 |
| | DON'T KNOW | BOX IA38 |

IA35C**ia5bndjtest**

R5 IA35C EST JOINT ONLY BNDS WRT

QUESTION TEXT:

SHOW CARD IA17

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$600	BOX IA38
2	\$600 TO LESS THAN \$5,000	BOX IA38
3	\$5,000 TO LESS THAN \$16,000	BOX IA38
4	\$16,000 TO LESS THAN \$62,000	BOX IA38
5	\$62,000 OR MORE	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA36A**ia5skbdspwrt**

R5 IA36A SP STKS BONDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you own".
Otherwise, display "SP owns".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you own/SP owns} {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range	1 to 9999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA36A = 1-9999999, go to BOX IA37A.

BOX IA36b**BOXIA36b**

NOT ON FILE

If IA8 = 1 (SP MUTUAL FUNDS), go to IA36b.
Otherwise, go to IA36c.

IA36B**ia5skbdspest****R5 IA36B EST SP STKS BNDS WRTH****QUESTION TEXT:**

SHOW CARD IA18

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$8,000	BOX IA37A
2	\$8,000 TO LESS THAN \$62,000	BOX IA37A
3	\$62,000 TO LESS THAN \$192,000	BOX IA37A
4	\$192,000 TO LESS THAN \$213,000	BOX IA37A
5	\$213,000 OR MORE	BOX IA37A
	REFUSED	BOX IA37A
	DON'T KNOW	BOX IA37A

IA36C**ia5bndspest****R5 IA36C EST SP ONLY BNDS WRTH****QUESTION TEXT:**

SHOW CARD IA19

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$300
2	\$300 TO LESS THAN \$2,500
3	\$2,500 TO LESS THAN \$8,000
4	\$8,000 TO LESS THAN \$37,000
5	\$37,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA37A**BOX IA37A****NOT ON FILE**

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

IA37a**ia5skbdptwrt****R5 IA37A PARTNR STKS BNDS WRTH****DISPLAY INSTRUCTIONS:**

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you own".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns".

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between each one.

QUESTION TEXT:

You told me earlier that {you own/{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns}{mutual funds or stocks}{government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range 1 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA37A = 1-9999999, go to BOX IA38.

BOX IA37b

BOXIA37b

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS), go to IA37b.
Otherwise, go to IA37c.

IA37B

ia5skbdptest

R5 IA37B PART EST STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$8,000	BOX IA38
2	\$8,000 TO LESS THAN \$62,000	BOX IA38
3	\$62,000 TO LESS THAN \$192,000	BOX IA38
4	\$192,000 TO LESS THAN \$213,000	BOX IA38
5	\$213,000 OR MORE	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA37C

ia5bndptest

R5 IA37C PART EST ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$300
2	\$300 TO LESS THAN \$2,500

- | | |
|---|-------------------------------|
| 3 | \$2,500 TO LESS THAN \$8,000 |
| 4 | \$8,000 TO LESS THAN \$37,000 |
| 5 | \$37,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA38

BOX IA38

NOT ON FILE

If [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or [IA10B = 1 (SP SAVINGS) and IA10B = 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or [IA10C = 1 (SP CDS) and IA10C = 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA38.
 Else if IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), go to IA39A.
 Else if IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA40A.
 Otherwise, go to BOX IA41.

IA38

ia5bkcdwrth

R5 IA38 BANK ACCT CD WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
 Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
 Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA10A = 1 (SP CHECKING) or IA10A = 2 (SPOUSE CHECKING) or IA10A = 3 (JOINT CHECKING), display "checking accounts".

If IA10B = 1 (SP SAVINGS) or IA10B = 2 (SPOUSE SAVINGS) or IA10B = 3 (JOINT SAVINGS), display "savings or money market accounts".

If IA10C = 1 (SP CDS) or IA10C = 2 (SPOUSE CDS) or IA10C = 3 (JOINT CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have {checking accounts}{savings or money market accounts}{certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- | | | |
|---|--|-----------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA39A |
| | REFUSED | BOX IA38B |
| | | BOX IA38B |

DON'T KNOW

IA38A

ia5bkcdjtwrt

R5 IA38A JOINT BNK ACCT CD WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999

Do not display the phrase 'Enter Number'.

If IA38A = 1-9,999,999, go to BOX IA41a.

BOX IA38B

BOX IA38B

NOT ON FILE

If IA10C = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38B.
Otherwise, go to IA38C.

IA38B

ia5bnkjtest

R5 IA38B EST JOINT BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA20

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$11,000	BOX IA41
2	\$11,000 TO LESS THAN \$25,000	BOX IA41
3	\$25,000 TO LESS THAN \$50,000	BOX IA41
4	\$50,000 TO LESS THAN \$108,000	BOX IA41
5	\$108,000 OR MORE	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA38C

ia5bnkjtest

R5 IA38C EST JOINT BNK NO CD WRT

QUESTION TEXT:

SHOW CARD IA21

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$2,000	BOX IA41
2	\$2,000 TO LESS THAN \$7,000	BOX IA41
3	\$7,000 TO LESS THAN \$17,000	BOX IA41
4	\$17,000 TO LESS THAN \$57,000	BOX IA41
5	\$57,000 OR MORE	BOX IA41

REFUSED
DON'T KNOW

BOX IA41
BOX IA41

IA39A

ia5bkcdspwrt

R5 IA39A SP BNK CDS WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

If IA10A = 1 (SP CHECKING), display "a checking account".
If IA10B = 1 (SP SAVINGS), display "a savings or money market account".
If IA10C = 1 (SP CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you have/SP has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA39A = 1-9,999,999, go to BOX IA40A.

BOX IA39B

BOX IA39B

NOT ON FILE

If IA10C = 1 (SP CDs), go to IA39B.
Otherwise, go to IA39C.

IA39B

ia5bkcdspest

R5 IA39B SP EST BNK ACCT CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$8,000	BOX IA40A
2	\$8,000 TO LESS THAN \$13,000	BOX IA40A
3	\$13,000 TO LESS THAN \$28,000	BOX IA40A
4	\$28,000 TO LESS THAN \$54,000	BOX IA40A
5	\$54,000 OR MORE	BOX IA40A
	REFUSED	BOX IA40A
	DON'T KNOW	BOX IA40A

IA39C**ia5bnkspest**

R5 IA39C SP EST BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$1,900
3	\$1,900 TO LESS THAN \$5,000
4	\$5,000 TO LESS THAN \$20,000
5	\$20,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA40A**BOXIA40A**

NOT ON FILE

If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA40A.
Otherwise, go to BOX IA41.

IA40A**ia5bkcdptwrt**

R5 IA40A PARTNR BNK ACCT CD WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

If IA10A = 2 (SPOUSE CHECKING), display "a checking account".
If IA10B = 2 (SPOUSE SAVINGS), display "a savings or money market account".
If IA10C = 2 (SPOUSE CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA40A = 1-9,999999, go to BOX IA41.

BOX IA40B

BOX IA40B

NOT ON FILE

If IA10C = 2 (SPOUSE CDS), go to IA40B.
Otherwise, go to IA40C.

IA40B

ia5bkcdptest

R5 IA40B EST PARTNR BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$8,000	BOX IA41A
2	\$8,000 TO LESS THAN \$13,000	BOX IA41A
3	\$13,000 TO LESS THAN \$28,000	BOX IA41A
4	\$28,000 TO LESS THAN \$54,000	BOX IA41A
5	\$54,000 OR MORE	BOX IA41A
	REFUSED	BOX IA41A
	DON'T KNOW	BOX IA41A

IA40C

ia5bnkptest

R5 IA40C EST PART BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$1,900
3	\$1,900 TO LESS THAN \$5,000
4	\$5,000 TO LESS THAN \$20,000
5	\$20,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA41**BOX IA41**

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), or [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or [IA10B = 1 (SP SAVINGS) and IA10B = 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or [IA10C = 1 (SP CDS) and IA10C = 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA41.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS) or IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), go to IA42A.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43A.
Otherwise, go to BOX IA44.

IA41**ia5itdvinc**

R5 IA41 AMT INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".
If [IA10A = 1 (SP CHECKING) or 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING)] or [IA10B = 1 (SP SAVINGS) or 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS)] or [IA10C = 1 (SP CDS) or 2 (SPOUSE CDS) or 3 (JOINT CDS)], display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have altogether from {mutual funds or stocks} {government, corporate, or other bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA41A**ia5itdvjamt**

R5 IA41A JOINT INT DIV INC LS YR

QUESTION TEXT:

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

ENTER NUMBER

Range

0 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999

Do not display the phrase 'Enter Number'.

If IA41A = 0-99999, go to BOX IA44.

IA41B
ia5itdvjtest

R5 IA41B EST JNT INTDV INC LS YR

QUESTION TEXT:

SHOW CARD IA24

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$200	BOX IA44
2	\$200 TO LESS THAN \$1,000	BOX IA44
3	\$1,000 TO LESS THAN \$4,000	BOX IA44
4	\$4,000 TO LESS THAN \$16,000	BOX IA44
5	\$16,000 OR MORE	BOX IA44
	REFUSED	BOX IA44
	DON'T KNOW	BOX IA44

IA42A
ia5itdvspamt

R5 IA42A SP INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you".
Otherwise, display "SP".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS), display "bonds".

If IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999
Do not display the phrase 'Enter Number'.
If IA42A = 0-9999, go to BOX IA43A.

IA42B**ia5itdvspst****R5 IA42B EST SP INTDIV INC LS YR****QUESTION TEXT:**

SHOW CARD IA25

Please look at this card and tell me which is closest.

CODES

- 1 LESS THAN \$400
- 2 \$400 TO LESS THAN \$1,000
- 3 \$1,000 TO LESS THAN \$2,000
- 4 \$2,000 TO LESS THAN \$11,000
- 5 \$11,000 OR MORE
- REFUSED
- DON'T KNOW

BOX IA43A**BOXIA43A****NOT ON FILE**

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43aA
Otherwise, go to BOX IA44.

IA43A**ia5itdvptamt****R5 IA43A PART INT DIV INC LS YR****DISPLAY INSTRUCTIONS:**

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

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "bonds".
If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999
Do not display the phrase 'Enter Number'.
If IA43A = 0-9999, go to BOX IA44.

IA43B

ia5itdvptest

R5 IA43B ESTPRT INT DV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Please look at this card and tell me which is closest.

CODES

1 LESS THAN \$400
2 \$400 TO LESS THAN \$1,000
3 \$1,000 TO LESS THAN \$2,000
4 \$2,000 TO LESS THAN \$11,000
5 \$11,000 OR MORE
REFUSED
DON'T KNOW

BOX IA44

BOX IA44

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA44.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA45A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

IA44

ia5brewrt

R5 IA44 BUSINESS REALESTATE WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home".

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA44A**ia5brejtwrt**

R5 IA44A JOINT BUS REAL WRTH

QUESTION TEXT:

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

ENTER NUMBER

Range

0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999

Do not display the phrase 'Enter Number'.

If IA44A = 0-99999999, go to BOX IA47.

IA44B**ia5brejtest**

R5 IA44B EST JOINT BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA26

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$30,000	BOX IA47
2	\$30,000 TO LESS THAN \$101,000	BOX IA47
3	\$101,000 TO LESS THAN \$247,000	BOX IA47
4	\$247,000 TO LESS THAN \$703,000	BOX IA47
5	\$703,000 OR MORE	BOX IA47
	REFUSED	BOX IA47
	DON'T KNOW	BOX IA47

IA45A**ia5brespwrt**

R5 IA45A SP BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display “you have”.
Otherwise, display “SP has”.

If HP1 = 1 (OWNS HOME), display “other than {SP}'s home”

QUESTION TEXT:

You told me earlier that {you have/SP has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range 0 to 99999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA45A = 0-99999999, go to BOX IA46A.

IA45B

ia5brespest

R5 IA45B EST SP BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA27

Please look at this card and tell me which is closest.

CODES

1 LESS THAN \$18,000
2 \$18,000 TO LESS THAN \$68,000
3 \$68,000 TO LESS THAN \$122,000
4 \$122,000 TO LESS THAN \$293,000
5 \$293,000 OR MORE
REFUSED
DON'T KNOW

BOX IA46A

BOX IA46A

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

IA46A

ia5breptwrt

R5 IA46A PART BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you have”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME} has”.

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999

Do not display the phrase 'Enter Number'.

If IA46A = 0-99999999, go to BOX IA47.

IA46B

ia5breptest

R5 IA46B EST PART BUS RE WRTH

QUESTION TEXT:

SHOW CARD IA27

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$18,000
2	\$18,000 TO LESS THAN \$68,000
3	\$68,000 TO LESS THAN \$122,000
4	\$122,000 TO LESS THAN \$293,000
5	\$293,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA47

BOX IA47

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA47.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA48A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
Otherwise, go to IA50.

IA47

ia5breiinc

R5 IA47 BUS REALESTATE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

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

IA47A

ia5breijtamt

R5 IA47A JOINT BUS RE INC LS YR

QUESTION TEXT:

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

ENTER NUMBER

Range

0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA47A = 0-99999999, go to BOX IA50.

IA47B

ia5breijtest

R5 IA47B EST JNT BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA28

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$3,600	IA50
2	\$3,600 TO LESS THAN \$12,000	IA50
3	\$12,000 TO LESS THAN \$25,000	IA50
4	\$25,000 TO LESS THAN \$64,000	IA50
5	\$64,000 OR MORE	IA50
	REFUSED	IA50

DON'T KNOW

IA50

IA48A

ia5breispamt

R5 IA48A AMT SP BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) , display "you".
Otherwise, display "SP".

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA48A = 0-99999999, go to BOX IA49A.

IA48B

ia5breispest

R5 IA48B EST SP BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Please look at this card and tell me which is closest.

CODES

- | | |
|---|--------------------------------|
| 1 | LESS THAN \$3,600 |
| 2 | \$3,600 TO LESS THAN \$7,200 |
| 3 | \$7,200 TO LESS THAN \$14,000 |
| 4 | \$14,000 TO LESS THAN \$38,000 |
| 5 | \$38,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA49A

BOXIA49A

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
Otherwise, go to IA50.

IA49A**ia5breiptamt**

R5 IA49A PART BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}".

Display "in the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range

0 to 99999999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999

Do not display the phrase 'Enter Number'.

If IA49A = 0-99999999, go to BOX IA50.

IA49B**ia5breiptest**

R5 IA49B EST PRT BS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Please look at this card and tell me which is closest.

CODES

- | | |
|---|--------------------------------|
| 1 | LESS THAN \$3,600 |
| 2 | \$3,600 TO LESS THAN \$7,200 |
| 3 | \$7,200 TO LESS THAN \$14,000 |
| 4 | \$14,000 TO LESS THAN \$38,000 |
| 5 | \$38,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

IA50**ia5totinc**

R5 IA50 TOTAL INCOME

ia5toincimf

R5 F IMPUTED TOTAL INC FLG

ia5toincim1

R5 IA50 IMPUTED TOTAL INC1

ia5toincim2

R5 IA50 IMPUTED TOTAL INC2

ia5toincim3

R5 IA50 IMPUTED TOTAL INC3

ia5toincim4

R5 IA50 IMPUTED TOTAL INC4

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "and
{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA1 = 1 (SP SS/RR) or 2 (SPOUSE SS/RR), display "Social Security or Railroad Retirement".
If IA4 = 1 (SP SSI) or 2 (SPOUSE SSI), display "Supplemental Security Income".
If IA5 = 1 (SP VA) or 2 (SPOUSE VA), display "the Veteran's Administration".
If IA6 = 1 (SP PENSION) or 2 (SPOUSE PENSION), display "a pension plan".
If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "any retirement accounts".
If IA8 = 1 (SP MUTUAL FUNDS), 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "bonds".
If IA10A = 1 (SP CHECKING), 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING) or IA10B = 1 (SP SAVINGS), 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS), display "bank accounts".
If IA10C = 1 (SP CDS), 2 (SPOUSE CDS) or 3 (JOINT CDS), display "CDs".
If IA13 = 1 (SP REAL ESTATE), 2 (SPOUSE REAL ESTATE) or 3 (JOINT REAL ESTATE), display "business, farm, or real estate".
If LF1 = 1 (SP WORK LAST WEEK) or LF2 = 1 (SP HAD JOB LAST WEEK) or LF3 = 1 (SP WORK LAST MONTH) or LF13 = 1 (SPOUSE WORK LAST MONTH), display "jobs".

If more than one income source displayed, display "and" between each one.

Display "last year" in underlined text.

QUESTION TEXT:

Now I want to ask about {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income for last year, that is, for the calendar year ending in December {CURRENT YEAR - 1} before any federal or state taxes were taken out.

Now think about that total income from:
{Social Security or Railroad Retirement} {Supplemental Security Income}
{the Veteran's Administration}
{a pension plan} {any retirement accounts}
{mutual funds or stocks} {bonds}
{bank accounts} {CDs} {business, farm or real estate}
{jobs} and from any other sources.

How much was {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income before taxes for last year (this is, for the 12 months ending in December {CURRENT YEAR - 1})?

IF NEEDED: We don't need an exact dollar amount – the nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER TOTAL INCOME FOR LAST YEAR [SECTION CO]

ENTER NUMBER

Range
REFUSED
DON'T KNOW

0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999

Do not display the phrase 'Enter Number'.

If IA50 = 0-99,999,999, go to Section CO.

BOX IA51A**BOXIA51A**

NOT ON FILE

If SP MARITAL STATUS=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51A.
Otherwise, go to IA51B.

IA51A**ia5toincesjt**

R5 IA51A JOINT EST TOT INCOME

ia5eincimjf

R5 F IMPTD JOINT EST TOT INC FLG

ia5eincimj1

R5 IA51A IMP EST JOINT TOT INC1

ia5eincimj2

R5 IA51A IMP EST JOINT TOT INC2

ia5eincimj3

R5 IA51A IMP EST JOINT TOT INC3

ia5eincimj4

R5 IA51A IMP EST JOINT TOT INC4

ia5eincimj5

R5 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA30

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$30,000	SECTION CO
2	\$30,000 TO LESS THAN \$43,000	SECTION CO
3	\$43,000 TO LESS THAN \$66,000	SECTION CO
4	\$66,000 TO LESS THAN \$109,000	SECTION CO
5	\$109,000 OR MORE	SECTION CO
	REFUSED	SECTION CO
	DON'T KNOW	SECTION CO

IA51B**ia5toincessg**

R5 IA51B SINGLE EST TOT INC

ia5eincimsf

R5 F IMPUTED SGL EST TOT INC FLG

ia5eincims1

R5 IA51B IMP EST SP SGL TOT INC1

ia5eincims2

R5 IA51B IMP EST SP SGL TOT INC2

ia5eincims3

R5 IA51B IMP EST SP SGL TOT INC3

ia5eincims4

R5 IA51B IMP EST SP SGL TOT INC4

ia5eincims5

R5 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA31

Please look at this card and tell me which is closest.

CODES

1	LESS THAN \$18,000
2	\$18,000 TO LESS THAN \$22,000
3	\$22,000 TO LESS THAN \$36,000
4	\$36,000 TO LESS THAN \$56,000
5	\$56,000 OR MORE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section CO – Car Ownership.

NHATS Round 5

Section CO [CAR OWNERSHIP]

Sequence: 39

CO1

co5owncartrv

R5 CO1 OWN ANY CARS TRUCKS VANS

DISPLAY INSTRUCTIONS:

If PROXY flag is null<> 1 (YES) or PROXY ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has RELATIONSHIP = 2 (SPOUSE/PARTNER)], display “Do you”.

Otherwise, display “Does SP”.

If HH1CURRENT INT MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “or {your/his/her} {husband/wife/partner}”.

If HH1CURRENT INT MARITAL STATUS = 2 (LIVING WITH A PARTNER), display “partner”.

If ROSTER MEMBER with RELATIONSHIP = 2 (SPOUSE/PARTNER) has SPOUSE GENDER=1 (MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “husband”.

If ROSTER MEMBER with RELATIONSHIP = 2 (SPOUSE/PARTNER) has SPOUSE GENDER=2 (FEMALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “wife”.

If SP GENDER=1 (MALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “husband”.

If SP GENDER=2 (FEMALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “wife”.

QUESTION TEXT:

{Do you/Does SP} {or {your/his/her} {husband/wife/partner}} own any cars, trucks, or vans?

IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes.

CODES

1	YES	
2	NO	SECTION EW
	REFUSED	SECTION EW
	DON'T KNOW	SECTION EW

CO2

co5manyvhcls

R5 CO2 HOW MANY VEHICLES OWN

DISPLAY INSTRUCTIONS:

If PROXY flag is null<> 1 (YES) or ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”.

Otherwise, display “does SP”.

If CURRENT INT MARITAL STATUS HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “or {your/his/her} {husband/wife/partner}”.

If CURRENT INT MARITAL STATUS HH1=2 (LIVING WITH A PARTNER), display “partner”.

If ROSTER MEMBER with RELATIONSHIP = 2 (SPOUSE/PARTNER) has SPOUSE GENDER=1 (MALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “husband”.

If ROSTER MEMBER with RELATIONSHIP = 2 (SPOUSE/PARTNER) has SPOUSE GENDER=2 (FEMALE) and [ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “wife”.

If SP GENDER=1 (MALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “husband”.

If SP GENDER=2 (FEMALE) and ROSTER MEMBER with PROXY RESPONDENT flag = 1 (YES) has PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “wife”.

QUESTION TEXT:

How many vehicles {do you/does SP}{or {your/his/her}{husband/wife/partner}} own?

ENTER NUMBER OF VEHICLES

ENTER NUMBER

Range	1 to 20
Soft Range	1 to 4
REFUSED	SECTION EW
DON'T KNOW	SECTION EW

PROGRAMMER INSTRUCTIONS:

Soft range: 1-4

Hard range: 1-20

CO₃	co5valuevehi	R5 CO₃ VALUE HOW MUCH WOULD BRING
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DISPLAY INSTRUCTIONS:

If CO₂=1, display “its”, “it”, and “it”.

Otherwise, display “their”, “they”, and “them”.

QUESTION TEXT:

Altogether, what is their present value, that is, about how much would they bring if {you/SP} sold them on today's market? The nearest \$1,000 is fine.

ENTER DOLLAR AMOUNT

\$

ENTER NUMBER

Range	0 to 1000000
Soft Range	1000 to 40000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Soft range: \$1000-\$40000

Hard range: \$0-\$1000000

Use input mask in response field (\$ 999,999,999) so that dollar sign is displayed and commas are inserted appropriately.

If a dollar amount is given, skip to Section EW – Economic Well-being.

CO_{3A}	co5vehivalue	R5 CO_{3A} VEHICLE VALUE
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QUESTION TEXT:

SHOW CARD CO1

Please look at the card and tell me which is closest

CODES

- | | |
|---|--------------------------------|
| 1 | LESS THAN \$2,500, |
| 2 | \$2,500 TO LESS THAN \$5,000 |
| 3 | \$5,000 TO LESS THAN \$10,000 |
| 4 | \$10,000 TO LESS THAN \$20,000 |
| 5 | \$20,000 TO LESS THAN \$50,000 |
| 6 | \$50,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Keep dollar signs & punctuation for response options exactly as detailed above.

Go to Section EW – Economic Well-being.

NHATS Round 5

Section EW [ECONOMIC WELL-BEING)

Sequence: 40

EW1

ew5pycredbal

R5 EW1 PAY OFF CREDIT CARD BALAN

DISPLAY INSTRUCTIONS:

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".

Otherwise display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP2 = 2 (HAVE TRADITIONAL MORTGAGE) or HP2 = 3 (HAVE REVERSE MORTGAGE), display "other kinds of".

QUESTION TEXT:

These next questions are about {other kinds of} debt.

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} usually pay off all credit card balances every month or only the minimum amount due?

CODES

- | | | |
|---|---|-----|
| 1 | PAY OFF BALANCE | EW5 |
| 2 | PAY MINIMUM | |
| 3 | PAY MORE THAN MINIMUM, BUT NOT ENTIRE BALANCE | |
| 4 | DON'T HAVE ANY CREDIT CARDS REFUSED
DON'T KNOW | EW5 |

EW2

ew5crecardeb

R5 EW2 TOTAL CREDIT CARD DEBT

QUESTION TEXT:

SHOW CARD EW1

Adding up all credit balances, please look at this card and tell me which is closest to what is owed.

CODES

- | | |
|---|--------------------------------|
| 1 | LESS THAN \$1,000 |
| 2 | \$1,000 TO LESS THAN \$2,000 |
| 3 | \$2,000 TO LESS THAN \$4,000 |
| 4 | \$4,000 TO LESS THAN \$6,000 |
| 5 | \$6,000 TO LESS THAN \$10,000 |
| 6 | \$10,000 TO LESS THAN \$20,000 |
| 7 | \$20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

EW3

ew5credcdmed

R5 EW3 CREDIT CARD MEDICAL CARE

QUESTION TEXT:

Is any of the amount owed on credit cards for medical care?

CODES

1	YES	
2	NO	EW5
	REFUSED	EW5
	DON'T KNOW	EW5

EW4

ew5amtcdrmed

R5 EW4 AMT ON CARDS FOR MED CARE

QUESTION TEXT:

How much is for medical care? Would you say most, some, or a little of the amount owed?

CODES

1	MOST
2	SOME
3	A LITTLE
	REFUSED
	DON'T KNOW

EW5

ew5medpaovtm

R5 EW5 MED BILLS PAID OVERTIME

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "paid off over time" in underlined text.

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any
medical bills that are being paid off over time?

CODES

1	YES	
2	NO	EW7
	REFUSED	EW7
	DON'T KNOW	EW7

EW6

ew5ampadovrt

R5 EW6 AMT FOR MED BIL OVR TIME

QUESTION TEXT:

SHOW CARD EW2

Please look at this card and tell me which is closest to that amount.

CODES

1	LESS THAN \$500
---	-----------------

- | | |
|---|---------------------------------|
| 2 | \$500 TO LESS THAN \$1,000 |
| 3 | \$1,000 TO LESS THAN \$2,000 |
| 4 | \$2,000 TO LESS THAN \$4,000 |
| 5 | \$4,000 TO LESS THAN \$6,000 |
| 6 | \$6,000 TO LESS THAN - \$10,000 |
| 7 | \$10,000 TO LESS THAN \$20,000 |
| 8 | \$20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

EW7
ew5finhlpfam

R5 EW7 FINANCIAL HELP FRM FAMILY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "children or other".

QUESTION TEXT:

Family members often help each other out financially. The next questions are about last year, ending
December 31, {CURRENT YEAR - 1 YEAR}.

Last year, did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}}
receive any financial help or financial gifts from {children or other} relatives, either regularly -- like every
month -- or just every so often as needed?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | EW11 |
| | REFUSED | EW11 |
| | DON'T KNOW | EW11 |

BOX EW8
BOX EW8

NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER),
or 8 (STEPSON), go to EW8.
Otherwise, go to EW10.

EW8
ew5whohelfi1

R5 EW8 CHILD HELPED FINANCIALLY

ew5whohelfi2

R5 EW8 OTHER HELPED FINANCIALLY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME/LASTNAME}'s".

If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Was that one of {your/SP's} {or {SP FIRSTNAME/LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME}'s} children or someone else who helped out (financially)?

SELECT ALL THAT APPLY

CODES

Code All That Apply

1	CHILD/CHILDREN	
2	SOMEONE ELSE	EW10
	REFUSED	EW10
	DON'T KNOW	EW10

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW9

op5chhlpfin

R5 EW9 CHILDREN WHO HELP FINANCE

DISPLAY INSTRUCTIONS:

Display PERSON ROSTER members with relationship codes = 3 (DAUGHTER), 4 = (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

QUESTION TEXT:

Which children helped out (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

ENTER TEXT

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

For each roster selection at EW9, set HELPEDSPFINANCIALLY flag =1 (YES) to person roster.

EW10

ew5atchhlyr

R5 EW10 AMT FROM CHILDR LST YR

QUESTION TEXT:

SHOW CARD EW2

Please look at this card and tell me which is closest to the amount in {CURRENT YEAR - 1}.

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$1,000
3	\$1,000 TO LESS THAN \$2,000
4	\$2,000 TO LESS THAN \$4,000
5	\$4,000 TO LESS THAN \$6,000
6	\$6,000 TO LESS THAN - \$10,000
7	\$10,000 TO LESS THAN \$20,000
8	\$20,000 OR MORE

REFUSED
DON'T KNOW

EW11

ew5fingftfam

R5 EW11 FINANCIAL GIFTS TO FAMILY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER)], display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8
(STEPSON), display "children or other".

QUESTION TEXT:

Last year, ending December 31, {CURRENT YEAR - 1 YEAR}, did {you/SP} {or {SP FIRSTNAME
LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} give any financial help or financial gifts to
{children or other} relatives, either regularly -- like every month -- or just every so often as needed?

CODES

1	YES	
2	NO	EW15
	REFUSED	EW15
	DON'T KNOW	EW15

BOX EW12

BOX E12

NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7
(STEPDAUGHTER), or 8 (STEPSON), go to EW12.
Otherwise, go to EW14.

EW12

ew5whregoth1

R5 EW12 GAVE CHILD FINCL HLP

ew5whregoth2

R5 EW12 SP GAVE GRANDCHD FIN HLP

ew5whregoth3

R5 EW12 SP GAVE OTHR FINANCL HLP

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'S".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Was that (financial) help to one of {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER
FIRSTNAME LASTNAME}'s} children, a grandchild, or someone else?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	CHILD/CHILDREN	
2	GRANDCHILD/GRANDCHILDREN	EW14
3	SOMEONE ELSE	EW14
	REFUSED	EW14
	DON'T KNOW	EW14

PROGRAMMER INSTRUCTIONS:
Allow code all that apply

EW13 **op5hlpchfin** R5 EW13 HELPED CHILDREN FINANCE

DISPLAY INSTRUCTIONS:

Display PERSON ROSTER members with relationship codes = 3 (DAUGHTER), 4 = (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

QUESTION TEXT:

Which children were helped (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

ENTER TEXT

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

For each roster selection at EW13, set SPHELPEDFINANCIALLY flag = 1 (YES) to person roster.

EW14 **ew5amthlpgiv** R5 EW14 AMOUNT OF HELP GIVEN

QUESTION TEXT:

SHOW CARD EW2

Please look at this card and tell me which is closest to the amount in {CURRENT YEAR – 1}.

CODES

- | | |
|---|---------------------------------|
| 1 | LESS THAN \$500 |
| 2 | \$500 TO LESS THAN \$1,000 |
| 3 | \$1,000 TO LESS THAN \$2,000 |
| 4 | \$2,000 TO LESS THAN \$4,000 |
| 5 | \$4,000 TO LESS THAN \$6,000 |
| 6 | \$6,000 TO LESS THAN - \$10,000 |
| 7 | \$10,000 TO LESS THAN \$20,000 |
| 8 | \$20,000 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX EW15 **BOX E15** NOT ON FILE

Go to EW15.

EW15	ew5progneed1	R5 EW15 SP RECEIVD FOOD STAMPS
	ew5progneed2	R5 EW15 SP REC OTHR FOOD ASST
	ew5progneed3	R5 EW15 SP REC GAS ENERGY ASST

DISPLAY INSTRUCTIONS:

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Use "Same Question Stem" display for EW15[a-c].
If at EW15a, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "in the last year" in bold underlined text.

QUESTION TEXT:

{{}} There are several state and federal programs that help people in need. In the last year, did {you/SP}
{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive help from any of
these programs? {{}}

RESPONSE [1] a. Food stamps (also called the Supplemental Nutrition Assistance Program, or SNAP)?
RESPONSE [2] b. Other food assistance such as Meals-on-Wheels?
RESPONSE [3] c. Gas, electricity, or other energy assistance?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.
Display "variable text" in the a-c sequence until all rows have been displayed.

EW16	ew5mealskip1	R5 EW16 SKIP MEALS NO MONEY
-------------	---------------------	-----------------------------

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last month" in underlined text.

QUESTION TEXT:

We know people sometimes find it hard to make ends meet. Thinking about the last month, did {you/SP}

{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} skip any meals because there was not enough food, or money to buy food?

CODES

1	YES	
2	NO	EW18
	REFUSED	EW18
	DON'T KNOW	EW18

EW17

ew5mealskip2

R5 EW17 SKIP MEALS HOW OFTEN

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last month" in underlined text.

QUESTION TEXT:

How many days in the last month did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} skip meals? Would you say nearly every day, more than half the days, several days, but less than half the days, or a few days?

CODES

1	NEARLY EVERY DAY
2	MORE THAN HALF THE DAYS
3	SEVERAL DAYS (LESS THAN HALF)
4	A FEW DAYS
	REFUSED
	DON'T KNOW

EW18

ew5nopayhous

R5 EW18A NO MONEY FOR HOUSING

ew5nopayutil

R5 EW18B NO MONEY FOR UTILITIES

ew5nopaymed

R5 EW18C NO MONEY FOR MEDICAL

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for EW18[a-c].
Display "last year" in underlined text.

If at EW18a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]Were there times in the last year when {you/SP} did not have enough money to... {[]}

RESPONSE [1] a. pay the rent or mortgage?
RESPONSE [2] b. pay utility bills (gas, electric)?
RESPONSE [3] c. pay medical or prescription drug bills

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.
Display "variable text" in the a-c sequence until all rows have been displayed.

Go to Section HL – Helpers.

NHATS Round 5

Section HL [HELPERS]

Sequence: 41

BOX HL1PRE

BOX HL1PRE

NOT ON FILE

If no PERSON ROSTER MEMBERS are flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPSAROUNDINSIDE and
HELPSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEWITHLAUNDRY and
HELPEWITHSHOPPING and
HELPEWITHMEALS and
HELPEWITHBANKING and
HELPEWITHMONEYMATTERS and
HELPEWITHTRACKMEDS and
SATINWITHDOCTOR and
HELPEWITHMAKEINSURANCEDECISIONS, go to Section LS – NLTCs Questions.

Else if the only PERSON ROSTER MEMBERS flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPSAROUNDINSIDE and
HELPSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEWITHLAUNDRY and
HELPEWITHSHOPPING and
HELPEWITHMEALS and
HELPEWITHBANKING and
HELPEWITHMONEYMATTERS and
HELPEWITHTRACKMEDS and
SATINWITHDOCTOR and
HELPEWITHMAKEINSURANCEDECISIONS
are STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
HELPEWITHMEALS), or MEALS ON WHEELS (for HELPEWITHMEALS), go to Section LS – NLTCs
Questions.

Otherwise, go to HL1PRE.

HL1PRE

HL1PRE

NOT NO FILE

QUESTION TEXT:

Next I have a few questions about the people who you said help {you/SP} with daily activities.

PRESS 1 AND ENTER TO CONTINUE

ENTER TEXT

Length

1

BOX HL1**op5ishelper**

R5 BXHL1 ELIGIBLE HL SECTION

For each PERSON ROSTER MEMBER flagged = 1 (YES) for
HELPSGOOUTSIDE or
HELPSAROUNDINSIDE or
HELPSOUTOF BED or
TOOKPLACESMOSTOFTEN or
TOOKPLACES or
HELPSWITHEATING or
HELPSWITHBATHING or
HELPSWITHTOILETING or
HELPSWITHDRESSING or
HELPEWITHLAUNDRY or
HELPEWITHSHOPPING or
HELPEWITHMEALS or
HELPEWITHBANKING or
HELPEWITHMONEYMATTERS or
HELPEWITHTRACKMEDS or
SATINWITHDOCTOR or
HELPEWITHMAKEINSURANCEDECISIONS
who is not a STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
HELPEWITHMEALS), or MEALS ON WHEELS (for HELPE WITH MEALS), set HELPER flag=1 (YES).

Write HELPER flag to PERSON ROSTER for each roster member.

Loop through HL1 and HL8 for each PERSON ROSTER MEMBER with a HELPER flag =1 (YES).

HL1**op5helpsched**

R5 HL1 HELP IS REG SCHEDULED

QUESTION TEXT:

Does {PERSON ROSTER MEMBER FIRSTNAME LASTNAME} have a regular schedule, or does his/her
schedule vary?

CODES

1	REGULAR	
2	VARIED	HL3
	REFUSED	HL3
	DON'T KNOW	HL3

PROGRAMMER INSTRUCTIONS:

Write HELPSCHEDULE response to PERSON ROSTER for roster member.

HL2**op5numdayswk**

R5 HL2 NUM DAYS HELP PER WK

QUESTION TEXT:

In the last month, on how many days per week did {PERSON ROSTER MEMBER FIRST NAME LASTNAME}
help {you/SP}?

ENTER NUMBER OF DAYS

ENTER NUMBER

Range	0 to 7
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write #DAYSHelpWEEK response to PERSON ROSTER for roster member.

BOX HL3**BOX HO4**

NOT ON FILE

If HL2 = 0, DK, or RF, go to BOX HL5.

Otherwise, go to HL4.

HL3**op5numdaysmn**

R5 HL3 NUM DAYS HELP PER MON

QUESTION TEXT:

In the last month, on how many days did {PERSON ROSTER MEMBER FIRST NAME LASTNAME} help {you/SP}?

ENTER NUMBER OF DAYS

ENTER NUMBER

Range

0 to 31

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Write #DAYSHelpMONTH response to PERSON ROSTER for roster member.

BOX HL4**BOX HL4**

NOT ON FILE

If HL3 = 0, go to BOX HL5.

Otherwise, go to HL4.

HL4**op5numhrsday**

R5 HL4 NUM HRS HELP PER DAY

QUESTION TEXT:

On days when {PERSON ROSTER MEMBER FIRST NAME LASTNAME} helped, about how many hours per day did (he/she) help {you/SP}?

ENTER NUMBER OF HOURS

IF LESS THAN 1 HOUR, ENTER ZERO

ENTER NUMBER

Range

0 to 24

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Write #HOURSHELP response to PERSON ROSTER for roster member.

BOX HL5**BOX HL5**

NOT ON FILE

If PERSON ROSTER member relationship = 2 (SPOUSE/PARTNER), go to BOX HL9.

Else if PERSON ROSTER member relationship = 31 (PAID AIDE/HOUSEKEEPER/EMPLOYEE), go to HL6.

Otherwise, go to HL5.

HL5**op5paidhelp**

R5 HL5 HELPER IS PAID

QUESTION TEXT:

Is {PERSON ROSTER MEMBER FIRST NAME LASTNAME} paid to provide this help?

IF NEEDED: By paid help, we mean paid by someone as part of a job. We will ask next who pays the person.

CODES

1	YES	
2	NO	BOX HL9
	REFUSED	BOX HL9
	DON'T KNOW	BOX HL9

PROGRAMMER INSTRUCTIONS:

Write #PAIDHELP response to PERSON ROSTER for roster member.

HL6**op5sppayshlp**

R5 HL6 SP PAYS FOR HELP

op5govpayhlp

R5 HL6 GOVT PAYS FOR HELP

op5inspayhlp

R5 HL6 INSUR PAYS FOR HELP

op5othpayhlp

R5 HL6 OTHER PAYS FOR HELP

QUESTION TEXT:

Is {PERSON ROSTER MEMBER FIRST NAME LASTNAME} paid by {you/SP}, {your/his/her} family, by a government program, by {your/his/her} insurance, or what?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	SP AND/OR FAMILY	BOX HL7
2	GOVERNMENT PROGRAM	BOX HL7
3	INSURANCE	BOX HL7
91	OTHER (SPECIFY)	
	REFUSED	BOX HL7
	DON'T KNOW	BOX HL7

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

Write WHOPAYS response to PERSON ROSTER for roster member.

HL6A**HL6A**

NOT ON FILE

QUESTION TEXT:

SPECIFY WHO PAYS FOR PERSON WHO HELPS {SP}.

Text 50 char

ENTER TEXT

Length

50

BOX HL7**BOX HL7**

NOT ON FILE

If HL6=1 (SP AND/OR FAMILY), go to HL7.
Else if HL6=2 (GOVERNMENT PROGRAM), go to HL8.
Otherwise, go to BOX HL9.

HL7**op5payunit**

R5 HL7 PAYMENT UNIT

QUESTION TEXT:

How much did {you/SP} (and {your/his/her} family) pay {PERSON ROSTER MEMBER FIRST NAME
LASTNAME} last month?

INDICATE RESPONSE UNIT

CODES

1	HOURLY	
2	WEEKLY	HL7B
3	MONTHLY	HL7C
4	DID NOT PAY IN LAST MONTH	BOX HL8
91	OTHER (SPECIFY)	HL7D
	REFUSED	BOX HL8
	DON'T KNOW	BOX HL8

PROGRAMMER INSTRUCTIONS:

Write PAYUNIT response to PERSON ROSTER for roster member.

HL7A**op5hourlypay**

R5 HL7A HOURLY AMOUNT PAID

QUESTION TEXT:

ENTER HOURLY AMOUNT PAID
\$ _____.

ENTER NUMBER

Range	1 to 999.99
Soft Range	5 to 50

PROGRAMMER INSTRUCTIONS:

Write HOURLYAMOUNT response to PERSON ROSTER for roster member.

If valid amount given, skip to Box HL8.

HL7B**op5weeklypay**

R5 HL7B WEEKLY AMOUNT PAID

QUESTION TEXT:

ENTER WEEKLY AMOUNT PAID
\$ _____.

ENTER NUMBER

Range	1 to 9999
Soft Range	50 to 1000

PROGRAMMER INSTRUCTIONS:

Write WEEKLYAMOUNT response to PERSON ROSTER for roster member.

If valid amount given, skip to Box HL8.

HL7C**op5monthlpy****R5 HL7C MONTHLY AMOUNT PAID****QUESTION TEXT:**

ENTER MONTHLY AMOUNT PAID

\$

ENTER NUMBER

Range

1 to 9999

Soft Range

50 to 5000

PROGRAMMER INSTRUCTIONS:

Write MONTHLYAMOUNT response to PERSON ROSTER for roster member.

Go to BOX HL8.

HL7D**HL7D****NOT ON FILE****QUESTION TEXT:**

SPECIFY OTHER RATE OF PAYMENT.

ENTER TEXT

Length

50

BOX HL8**BOX HL8****NOT ON FILE**

If HL6=2 (GOVERNMENT PROGRAM), go to HL8.

Otherwise, go to Box HL9.

HL8**op5progmpaid****R5 HL8 PROGRAM PAID FOR HELPER****DISPLAY INSTRUCTIONS:**

Display “, also known as {STATE NAME FOR MEDICAID PROGRAM}” if state name for Medicaid is not “Medicaid”.

QUESTION TEXT:

Do you know whether this program is Medicaid {, also known as {STATE MEDICAID PROGRAM NAME}}, Medicare, a state program, or something else?

CODES

1	MEDICAID	BOX HL9
2	MEDICARE	BOX HL9
3	STATE PROGRAM	BOX HL9
91	OTHER (SPECIFY)	
	REFUSED	BOX HL9
	DON'T KNOW	BOX HL9

PROGRAMMER INSTRUCTIONS:

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.

Write PROGRAMPAID response to PERSON ROSTER for roster member.

HL8A

HL8A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PROGRAM.

Text 50 char

ENTER TEXT

Length

50

BOX HL9

BOX HL9

NOT ON FILE

Go to HL1 for next PERSON ROSTER MEMBER with HELPER flag=1 (YES).

If no additional PERSON ROSTER MEMBER with HELPER flag=1 (YES), go to Section LS – NLTCS Questions.

Derived Variables From Items in HL Section	
--	--

op5dhrsmth	R5 D HL2 HL3 HL4 HRS HELP MONTH
------------	---------------------------------

NHATS Round 5

Section LS [NLTCS QUESTIONS]

Sequence: 42

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

Is5evdayact1

R5 LS1 EATING W OUT HELP SP EQUIP

Is5evdayact2

R5 LS1 GET IN OUT BED W OUT HELP

Is5evdayact3

R5 LS1 GET IN OUT CHR W OUT HELP

Is5evdayact4

R5 LS1 WALK INSIDE WITHOUT HELP

Is5evdayact5

R5 LS1 GO OUTSIDE W OUT HLP SP EQ

Is5evdayact6

R5 LS1 DRESSING WITHOUT HELP

Is5evdayact7

R5 LS1 BATHING WITHOUT HELP

Is5evdayact8

R5 LS1 TOILETING WITHOUT HELP

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for LS1a-LS1h

If at LS1a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{{}}The next few questions are about {your/SP's} ability to do everyday activities without help. By help, I mean either the help of another person, including the people who live with {you/him/her}, or the help of special equipment. {{}}

{{}}{Do you/Does SP} have any problem...{{}}

{variable text a-h}

RESPONSE [1] a. eating without the help of another person or special equipment?

RESPONSE [2] b. getting in or out of bed without help?

RESPONSE [3] c. getting in or out of chairs without help?

RESPONSE [4] d. walking around inside without help?

RESPONSE [5] e. going outside without the help of another person or special equipment?

RESPONSE [6] f. dressing without help?

RESPONSE [7] g. bathing without help?

RESPONSE [8] h. getting to the bathroom or using the toilet?

CODES

- | | |
|---|-------------------|
| 1 | YES |
| 2 | NO |
| 3 | CAN'T DO/DON'T DO |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-h sequence until all rows have been displayed.

LS2	Is5ableto1	R5 LS2 PREPARE MEALS W OUT HELP
	Is5ableto2	R5 LS2 LAUNDRY WITHOUT HELP
	Is5ableto3	R5 LS2 SP ABLE LIGHT HOUSEWORK
	Is5ableto4	R5 LS2 SHOP FOR GROC WOUT HELP
	Is5ableto5	R5 LS2 SP ABLE MANAGE MONEY
	Is5ableto6	R5 LS2 SP TAKE MEDS WOUT HELP
	Is5ableto7	R5 LS2 SP MAKE TELEPHONE CALLS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for LS2a-LS2g.

If at LS2a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}{Are you/Is SP} able to... {}

IF SP DOES NOT DO, BUT IS ABLE TO DO AN ACTIVITY, CODE "YES" FOR THE ACTIVITY

{variable text a-g}

RESPONSE [1] a. prepare meals without help?

RESPONSE [2] b. do laundry without help?

RESPONSE [3] c. do light housework such as washing dishes?

RESPONSE [4] d. shop for groceries without help?

RESPONSE [5] e. manage money, such as keeping track of bills and handling cash?

RESPONSE [6] f. take medicine without help?

RESPONSE [7] g. make telephone calls without help?

CODES

- | | |
|---|------------|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-g sequence until all rows have been displayed.

BOX LS3

BOXLS3

NOT ON FILE

If LS2a=2 (NO), display LS3a.
If LS2b=2 (NO), display LS3b.
If LS2c=2 (NO), display LS3c.
If LS2d=2 (NO), display LS3d.
If LS2e=2 (NO), display LS3e.
If LS2f=2 (NO), display LS3f.

If LS2g=2 (NO), display LS3g.
Otherwise, go to Section CL – Closing.

LS3

Is5diskefrm1
Is5diskefrm2
Is5diskefrm3
Is5diskefrm4
Is5diskefrm5
Is5diskefrm6
Is5diskefrm7

R5 LS3 DIS KEEPS FROM MEAL PREP
R5 LS3 DIS KEEPS FROM LAUNDRY
R5 LS3 DIS KEEPS FRM LGHT HOUSWK
R5 LS3 DIS KEEPS FRM SHOP GROC
R5 LS3 DIS KEEPS FRM MANAGE MONY
R5 LS3 DIS KEEPS FROM TAKE MEDS
R5 LS3 DIS KEEPS FROM TELEPHONE

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display for LS3a-LS3g.

If at LS3a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]Does a disability or a health problem keep {you/SP} from... []}

{variable text a-g}

RESPONSE [1] a. preparing meals?
RESPONSE [2] b. doing laundry?
RESPONSE [3] c. doing light housework?
RESPONSE [4] d. shopping for groceries?
RESPONSE [5] e. managing money?
RESPONSE [6] f. taking medicine?
RESPONSE [7] g. making telephone calls?

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-g sequence until all rows have been displayed.

Go to Section CL – Closing.

NHATS Round 5

Section IR [INTERVIEWER REMARKS]

Sequence: 43

IR1A1 **ir5intlang** R5 IR1A1 INTERVIEW LANGUAGE

QUESTION TEXT:

What language did you use to conduct this interview?

CODES

1	English	IR1
2	Spanish	IR1
3	Other (specify)	

IR1A2 **IR1A2** NOT ON FILE

QUESTION TEXT:

Specify language used to conduct interview.

ENTER TEXT

Length 25

IR1 **IR1** NOT ON FILE

QUESTION TEXT:

Was the SP interview completed in person or by telephone?

ENTER TEXT

Length 500

BOXIR1A **BOXIR1a** NOT ON FILE

QUESTION TEXT:

If DECEASED flag = 1 (YES), go to IR2.
Otherwise, go to IR1A.

IR1A **IR1A** NOT ON FILE

QUESTION TEXT:

Describe why the SP interview was conducted by telephone.

CODES

1	In person	IR2
2	Telephone	

IR2 **ir5spattitud** R5 IR2 SP ATTITUDE TOWARD INTVW

QUESTION TEXT:

In general, what was the respondent's attitude toward the interview?

CODES

- | | |
|---|---|
| 1 | Friendly and interested |
| 2 | Cooperative but not particularly interested |
| 3 | Impatient and restless |
| 4 | Hostile |

IR3**ir5undrstand**

R5 IR3 SP UNDERSTAND QUESTION

QUESTION TEXT:

In general, how was the respondent's understanding of the questions?

CODES

- | | | |
|---|------|---------|
| 1 | Good | Box IR4 |
| 2 | Fair | |
| E | Poor | |

IR3A**IR3A**

NOT ON FILE

QUESTION TEXT:

Select any issues that may have affected respondent's understanding of the questions

Select all that apply.

CODES**Code All That Apply**

- | | | |
|----|-----------------------------|---------|
| 1 | Hearing problems | BOX IR4 |
| 2 | Language barrier | BOX IR4 |
| 3 | SP has Alzheimer's/Dementia | BOX IR4 |
| 91 | Other (Specify) | |

IR3B**IR3B**

NOT ON FILE

QUESTION TEXT:

Describe any circumstances that may have affected respondent's understanding of the questions.

ENTER TEXT

Length

500

BOX IR4**BOX IR4**

NOT ON FILE

If DECEASED flag = 1 (YES), go to IR23.

Else if PROXY flag = 1 (yes), go to IR4.

Otherwise go to IR6

IR4**ir5ppresent**

R5 IR4 AMT OF INTERVIEW SP PRESENT

QUESTION TEXT:

About how much of the interview was the SP present for?

CODES

1	All of the time	IR6
2	Most of the time	IR6
3	Some of the time	IR6
4	Only for the cognition and/or performance parts	IR6
5	None of the time	

IR5

ir5sppresreas1	R5 IR5 REASON SP NOT PRESENT_SLEEP
ir5sppresreas2	R5 IR5 REASON SP NOT PRESENT_2ILL
ir5sppresreas3	R5 IR5 REASON SP NOT PRESENT_ALZH
ir5sppresreas4	R5 IR5 REASON SP NOT PRESENT_PRXYREQ
ir5sppresreas5	R5 IR5 REASON SP NOT PRESENT_INFCLTY
ir5sppresreas6	R5 IR5 REASON SP NOT PRESENT_OTHSPFY

QUESTION TEXT:

Select reason(s) why the SP wasn't present for the interview?

CODES**Code All That Apply**

1	SP was sleeping	IR6
2	SP was too ill	IR6
3	SP has Alzheimer's/Dementia	IR6
4	Proxy request	IR6
5	SP in facility	IR6
91	Other (Specify)	

IR5A**IR5A**

NOT ON FILE

QUESTION TEXT:

Explain why the SP wasn't present for the interview.

ENTER TEXT

Length

500

IR6**ir6intvwhelp**

R5 IR6 ANYONE HELP WITH INTVW

DISPLAY INSTRUCTIONS:

If PROXY flag = 1 (yes), display "and the proxy".

QUESTION TEXT:

Besides the SP {and the proxy}, was there anyone else who helped answer questions during the interview?

CODES

1	Yes	
2	No	BOX IR7
3	Interview was conducted by telephone	BOX IR7

IR6A	ir5prsnhlp1	R5 IR6A SPOUSE HELPED WITH INTVW
	ir5prsnhlp2	R5 IR6A CHILD HELPED WITH INTVW
	ir5prsnhlp3	R5 IR6A RELATIVE HELP WITH INTVW
	ir5prsnhlp4	R5 IR6A FRIEND HELPED WITH INTVW
	ir5prsnhlp5	R5 IR6A STAFF HELPED WITH INTVW
	ir5prsnhlp6	R5 IR6A AIDE HELPED WITH INTVW
	ir5prsnhlp91	R5 IR6A OTHER HELPED WITH INTVW

QUESTION TEXT:

Select any issues that may have affected respondent's understanding of the questions

Select all that apply.

CODES	Code All That Apply
1	Spouse/Partner
2	Child of SP
3	Other relative
4	Friend/Neighbor
5	Staff person from place Sp lives
6	Personal helper/aide
91	Other

BOX IR7	BOX IR7	NOT ON FILE
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If IR4 = 5 (none of the time), go to IR8.

Otherwise, go to IR7.

IR7	IR7	NOT ON FILE
------------	------------	-------------

QUESTION TEXT:

Did you encounter any problems or issues with administering the SP cognition section?

CODES	
1	Yes
2	No
3	Not Administered
	IR8

IR7A	IR7A	NOT ON FILE
-------------	-------------	-------------

QUESTION TEXT:

Describe the SP cognition section problems, issues, or reasons not administered.

ENTER TEXT

Length

500

IR8	IR8	NOT ON FILE
------------	------------	-------------

QUESTION TEXT:

Did you encounter any problems or issues with CAPI?

CODES

1 Yes
2 No

BOX IR10

IR8A**IR8A**

NOT ON FILE

QUESTION TEXT:

Describe problem or issues with CAPI.

ENTER TEXT

Length

500

BOX IR10**BOX IR10**

NOT ON FILE

If IR4 = 5 (none of the time), go to IR12.

Otherwise, go to IR10.

IR10**IR10**

NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the physical activities?

CODES

1 Yes
2 No
3 Not Administered

IR10B

IR10A**IR10A**

NOT ON FILE

QUESTION TEXT:

Describe the physical activities problems, issues, or reasons not administered.

ENTER TEXT

Length

500

IR10B**ir5demolang1**

R5 PHYS ACT DEMO SAFETY TRANS

QUESTION TEXT:

Was the physical activities demonstration or the safety question "Do you think it would be safe to try this?"

Translate for the SP into a language other than English or Spanish?

CODES

1 Yes
2 No

IR11

IR10C**ir5demolang2 (Sensitive)**

R5 PHYS ACT DEMO SAFETY LANG

QUESTION TEXT:

What language was the physical activity demonstration or the safety question "Do you think it would be safe to try this?" translated into?

CODES

1	Arabic
2	Armenian
3	Bengali
4	Chinese - Cantonese
5	Chinese - Mandarin
6	Creole
7	Czech
8	Farsi
9	French
10	German
11	Greek
12	Guajarati
13	Hindi
14	Hungarian
15	Italian
16	Japanese
17	Korean
18	Laotian
19	Lithuanian
20	Panjabi
21	Polish
22	Portuguese
23	Russian
24	Slovak
25	Tagalog
26	Thai
27	Urdu
28	Vietnamese
91	Other (Specify)

PROGRAMMER INSTRUCTIONS:

If IR10C=1-28, go to IR11.
Otherwise, go to IR10D.

IR10D	IR10D	NOT ON FILE
--------------	--------------	-------------

QUESTION TEXT:

Enter the other language that the physical activities were translated into.

ENTER TEXT

Length	25
--------	----

IR12	ir5sessions	R5 IR12 MORE ONE INTVW SESSION
-------------	--------------------	--------------------------------

QUESTION TEXT:

Did you have to complete the SP interview in more than one session?

CODES

1	Yes	
2	No	IR12C

IR12A	ir5sessrsn1	R5 IR12A MORE 1 SESSION SP TIRED
--------------	--------------------	----------------------------------

ir5sessrsn2

R5 IR12A MORE 1 SESSION SP ILL

ir5sessrsn3

R5 IR12A MORE 1 SESSION SCHEDULE

ir5sessrsn91

R5 IR12A MORE 1 SESSION OTHER

QUESTION TEXT:

Select reason(s) for completing interview in more than 1 session.

Select all that apply

CODES

Code All That Apply

- | | |
|----|---|
| 1 | SP/Proxy too tired to complete in 1 session |
| 2 | SP/Proxy felt poorly/ill/SP's health |
| 3 | Schedule conflict for respondent |
| 91 | Other (Specify) |

PROGRAMMER INSTRUCTIONS:

If 91 selected by itself or with any other response, go to IR12B.
Otherwise, go to IR12C.

IR12B

IR12B

NOT ON FILE

QUESTION TEXT:

Describe other reason why the interview was completed in more than 1 session.

ENTER TEXT

Length

500

IR12C

ir5conhomapt

R5 IR12C INTRV CONDTD AT HME/APT

QUESTION TEXT:

Was the entire interview conducted inside SP's home/apartment/unit?

CODES

- | | | |
|---|---|-------|
| 1 | Yes | IR12E |
| 2 | No | |
| 3 | Entire interview conducted by telephone | IR12E |

IR12D

IR12D

NOT ON FILE

QUESTION TEXT:

Describe where the interview was completed and why it was not administered in SP's home/apartment/unit.

ENTER TEXT

Length

500

IR12E

ir5insidhome

R5 IR12E GO INSIDE HOME/APT/UNIT

QUESTION TEXT:

Did you go inside SP's home/apartment/unit?

CODES

- | | |
|---|-----|
| 1 | Yes |
|---|-----|

BOX IR13**BOX IR13****NOT ON FILE**

If IR12C = 1 (ENTIRE INTERVIEW IN HOME) or IR12E = 1 (WENT INSIDE HOME), go to IR13.

Otherwise, go to IR15.

IR13**ir5condihom1**

R5 IR13 PAINT PEELING IN SP HOME

ir5condihom2

R5 IR13 PESTS IN SP HOME

ir5condihom3

R5 IR13 BROKN FURNITURE SP HOME

ir5condihom4

R5 IR13 FLOORING NEEDS REPAIR

ir5condihom5

R5 IR13 HOM OTHR TRIPPING HAZRD

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at IR13a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{{}}Inside the SP's home/apartment/unit, did you observe...{{}}

{variable text [a-e]}

RESPONSE [1] a. peeling or flaking paint?

RESPONSE [2] b. evidence of pests (e.g., cockroaches, rodents, etc.)?

RESPONSE [3] c. broken furniture or lamps?

RESPONSE [4] d. flooring in need of repair (e.g., torn carpet, broken tiles, split wood)?

RESPONSE [5] e. other tripping hazards (e.g., pathways not clear, throw rugs not secured, electrical cords in path)?

CODES

1 Yes

2 No

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

Display 'variable text' in the a-e sequence until all rows have been displayed.

IR14**ir5clutter1**

R5 IR14 CLUTTR IN INTERVIEW ROOM

ir5clutter2

R5 IR14 CLUTTR IN OTHR SP ROOMS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at IR14a, do not display question text in brackets.

Otherwise, display question text in brackets.

If at IR14b, display response option 4, "Could not see other rooms".

QUESTION TEXT:

{{}}How cluttered...{{}}

{variable text [a-b]}

RESPONSE [1] a. was the room where the interview was held?

RESPONSE [2] b. were the other rooms in the SP's home/apartment/unit?

CODES

- | | |
|---|---------------------------|
| 1 | Not at all cluttered |
| 2 | Somewhat cluttered |
| 3 | Very cluttered |
| 4 | Could not see other rooms |

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

Display 'variable text' in the a-b sequence until all rows have been displayed.

IR15

ir5areacond1

R5 IR15 LITTER GLASS ON SDWLK ST

ir5areacond2

R5 IR15 GRAFFITI ON BUILDG WALLS

ir5areacond3

R5 IR15 VACANT HOUSES OR STORES

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at IR15a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

REFER TO THE HOME ENVIRONMENT CHECKLIST EC2a-c ITEMS WHEN ANSWERING THESE QUESTIONS.

{{}} When standing in front of the SP's home/building, and looking around in every direction, how much of the following did you see?{{}}

{variable text [a-c]}

RESPONSE [1] a. Litter, broken glass, or trash, on sidewalks and streets?

RESPONSE [2] b. Graffiti on buildings and walls?

RESPONSE [3] c. Vacant or deserted houses or storefronts?

CODES

- | | |
|---|-------------------|
| 1 | None |
| 2 | A Little |
| 3 | Some |
| 4 | A lot |
| 5 | Could not observe |

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

Display 'variable text' in the a-c sequence until all rows have been displayed.

IR16

ir5condhome1

R5 IR16 BROKEN WINDOWS IN HOME

ir5condhome2

R5 IR16 CRUMBLING FOUNDTN IN HOME

ir5condhome3

R5 IR16 MISSING BRCKS SIDNG IN HM

ir5condhome4

R5 IR16 ROOF PROBLEM IN HOME

ir5condhome5

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.
 If at IR16a, do not display question text in brackets.
 Otherwise, display question text in brackets.

QUESTION TEXT:

REFER TO THE HOME ENVIRONMENT CHECKLIST EC3a-F ITEMS WHEN ANSWERING THESE QUESTIONS.

{{Standing in front of the SP's home/building, did it have... {{}}

{variable text [a-f]}

RESPONSE [1] a. any broken or boarded up windows?

RESPONSE [2] b. a crumbling foundation or open holes?

RESPONSE [3] c. missing bricks, siding, or other outside materials?

RESPONSE [4] d. roof problems (e.g., missing material, sagging, or a hole in roof)?

RESPONSE [5] e. uneven walking surfaces or broken steps in the area leading to the home/building?

RESPONSE [6] f. continuous sidewalks in both directions?

CODES

1	Yes
2	No
7	Could not observe

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.
 Display 'variable text' in the a-f sequence until all rows have been displayed.

IR17	IR17	NOT ON FILE
-------------	-------------	-------------

QUESTION TEXT:

Are there any driving directions that you'd like to enter for the next round interviewer

CODES

1	Yes	
2	No	IR23

IR17A	IR17A	NOT ON FILE
--------------	--------------	-------------

QUESTION TEXT:

Provide driving directions for the next round interviewer.

ENTER TEXT

Length	500
--------	-----

IR23	IR23	NOT ON FILE
-------------	-------------	-------------

QUESTION TEXT:

Is there any information you have recorded in the CAPI SP interview that you would like the Home Office staff to correct?

CODES

1 Yes
2 No

BOX IR24

IR23A**IR23A**

NOT ON FILE

QUESTION TEXT:

Describe information you have recorded in the CAPI SP interview that you would like the Home Office staff to correct.

ENTER TEXT

Length

750

BOXIR24**BOXIR24**

NOT ON FILE

QUESTION TEXT:

If DECEASED flag = 1 (YES), go to IR25.
Otherwise, go to IR24.

IR24**IR24**

NOT ON FILE

QUESTION TEXT:

Are there any other comments about the case or the interviewing situation you would like to make?

CODES

1 Yes
2 No

IR25

IR24A**IR24A**

NOT ON FILE

QUESTION TEXT:

Describe other comments about the case or interviewing situation.

ENTER TEXT

Length

750

IR25**IR25**

NOT ON FILE

QUESTION TEXT:

Press 1 and Enter to return to IMS

PROGRAMMER INSTRUCTIONS:

Return to IMS.
Finalize SP IRQ task as complete (code 20).

NHATS Round 5

Section FQ [FACILITY STAFF QUESTIONNAIRE]

Sequence: 44

FQ1PRE

FQ1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If the NHATS Interview task =11 (READY) and NEWSAMPLE flag <> 1, display "CONFIRM WITH THE FACILITY {SP} IS ALIVE BEFORE CONTINUING" and "AND {SP} IS ALIVE"

QUESTION TEXT:

YOU HAVE SELECTED THE FACILITY STAFF QUESTIONNAIRE (FQ) FOR CASE

{CASE ID}, {SP}

{CONFIRM WITH THE FACILITY { SP} IS ALIVE BEFORE CONTINUING}.

IF THIS IS THE CORRECT CASE {AND {SP} IS ALIVE}, PRESS 1 AND ENTER TO CONTINUE

TO SELECT ANOTHER CASE OR TASK, BREAKOFF AND SELECT THE CORRECT CASE ID AND TASK FROM THE IMS

FQ1Consent

FQ1Consent

NOT ON FILE

QUESTION TEXT:

During the course of the study, we would like to record some of the questions and answers for training and data quality. I'd like to continue now unless you have any questions.

PRESS 1 AND ENTER TO CONTINUE

IF RESPONDENT REFUSES TO ALLOW AUDIO RECORDING, PRESS 7 AND ENTER

CODES

1	CONSENT TO RECORDING	FQ1A
7	REFUSE CONSENT TO RECORD	

FQ1NotRec

FQ1NotRec

NOT ON FILE

That's fine. The interview will not be recorded.

PRESS 1 AND ENTER TO CONTINUE

FQ1A

FQ1A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "FIRST" in bold underlined text.

Display FQ1a and FQ1b on the same screen.

QUESTION TEXT:

First, I would like to confirm your name and contact information.

What is your name?

ENTER FIRST NAME. CONFIRM SPELLING.

ENTER TEXT

Length

25

FQ1B

FQ1B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

Display FQ1a and FQ1b on the same screen.

QUESTION TEXT:

ENTER LAST NAME. CONFIRM SPELLING.

ENTER TEXT

Length

25

FQ2

FQ2

NOT ON FILE

QUESTION TEXT:

What is your job title?

ENTER TEXT

Length

50

FQ3A

FQ3A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.

Display "address" as underlined text.

QUESTION TEXT:

What is the mailing address here?

CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMERS INSTRUCTIONS:

If Breakoff at or before this screen, do not save any FQ data and set FQ task status = 11 (READY).

FQ3B

FQ3B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.

Display "address" as underlined text.

QUESTION TEXT:

[What is the mailing address here?]

CONFIRM SPELLING

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

ENTER TEXT

Length

25

PROGRAMMERS INSTRUCTIONS:

Allow empty

FQ3C

FQ3C

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "city" as underlined text.

QUESTION TEXT:

[What is the city?]

CONFIRM SPELLING

ENTER TEXT

Length

25

FQ3D

FQ3D

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "state" as underlined text.

QUESTION TEXT:

[What is the state?]

TYPE THE FIRST LETTER OF THE STATE, THEN USE ARROW KEYS IF NEEDED TO LOCATE STATE, AND PRESS
ENTER TO SELECT

PROGRAMMERS INSTRUCTIONS:

Use lookup file (51STATE) of state names.

FQ3E

FQ3E

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "zip code" as underlined text.

QUESTION TEXT:

[What is the zip code?]

ENTER A 5-DIGIT ZIP CODE

ENTER TEXT

Length

5

PROGRAMMERS INSTRUCTIONS:

5-digit entry required. If less than 5 digits entered, display Error Message #11.

FQ3F

FQ3F

NOT ON FILE

QUESTION TEXT:

What is the phone number here?

ENTER AREA CODE AND PHONE NUMBER

ENTER TEXT

Length
REFUSED

10

PROGRAMMERS INSTRUCTIONS:

Hard edit: if the answer from FQ3f contains less than 10 digits, display error message #12.

Use number input mask (xxx-xxx-xxxx) in the response field.

FQ4

FQ4

NOT ON FILE

QUESTION TEXT:

What is your email address here?

ENTER 97 IF NOT EMAIL ADDRESS

ENTER TEXT

Length
REFUSED

50

FQ5

FQ5

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "whole" as bold underlined text.

QUESTION TEXT:

What is the name of this place? If there are different names for certain parts of levels of care in this place, please tell me the name for the whole place.

ENTER TEXT

Length

75

FQ6

fq5dfacdesc

R5 FQ6 FACILITY TYPE

DISPLAY INSTRUCTIONS:

Display text from FQ5 as FACILITY NAME.

Display "whole" as underlined text.

QUESTION TEXT:

SHOW CARD FQ1

Now I'm going to show you a list of places.

Which of these BEST describes {FACILITY NAME FROM FQ5}? Again, if there are different parts or levels of care in this place, please tell me about the whole place.

PRESS F1 FOR HELP SCREEN

CODES

1

FREE STANDING NURSING HOME

FQ15

2	FREE STANDING ASSISTED LIVING FACILITY	FQ7
3	NURSING HOME AND ASSISTED LIVING FACILITY	FQ7
4	CONTINUING CARE RETIREMENT COMMUNITY (CCRC)	FQ7
5	ADULT FAMILY CARE HOME	FQ15
6	GROUP HOME	FQ15
7	BOARD AND CARE HOME	FQ15
8	RETIREMENT COMMUNITY OR SENIOR HOUSING (NOT CCRC)	FQ7
91	OTHER (SPECIFY)	
	REFUSED	FQ7
	DON'T KNOW	FQ7

FQ6A	fq5dosfacd	R5 FQ6A OTHER SPECIFY FAC TYPE
-------------	-------------------	--------------------------------

QUESTION TEXT:

SPECIFY TYPE OF PLACE

ENTER TEXT

Length

50

FQ7	FQ7	NOT ON FILE
------------	------------	-------------

QUESTION TEXT:

Next, I need to confirm where {SP} is living.

PRESS 1 AND ENTER TO CONTINUE

FQ8	fq5prtlinam	R5 FQ8 FAC NM DIFF4PLC SP LIVES
------------	--------------------	---------------------------------

QUESTION TEXT:

Does the part of {PLACE NAME FROM FQ5} in which {SP} lives have a different name?

CODES

1	YES	
2	NO	FQ10
	REFUSED	FQ10
	DON'T KNOW	FQ10

FQ9	FQ9	NOT ON FILE
------------	------------	-------------

QUESTION TEXT:

What is the name of {SP}'s area?

ENTER TEXT

Length

50

FQ10	fq5dfacarea	R5 FQ10 FACILITY AREA SP LIVES
-------------	--------------------	--------------------------------

QUESTION TEXT:

Is the place where {SP} lives considered independent living, assisted living, a special care unit, a nursing home care unit, or something else?

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**fq5dosfaca**

R5 D FQ10A OTHER SPECIFY FAC AREA

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length

50

PROGRAMMERS INSTRUCTIONS:

Go to FQ12

FQ11**fq5assdnrsng**

R5 FQ11 ASSIST LIV OR NURSG HOME

QUESTION TEXT:

Is this special care unit part of an assisted living facility or is it part of a nursing home?

CODES

1	ASSISTED LIVING
2	NURSING HOME
	REFUSED
	DON'T KNOW

FQ12**fq5othrlevls**

R5 FQ12 OTH LEVELS OF CARE AVAIL

QUESTION TEXT:

Besides where {SP} lives, are there other levels of care available at {PLACE NAME FREOM FQ5} such as independent living, assisted living, a special care unit, or a nursing home care unit?

CODES

1	YES	FQ13
2	NO	FQ15
	REFUSED	FQ15
	DON'T KNOW	FQ15

FQ13**fq5whotlevl1**

R5 FQ13 INDEPNDNT LIV CARE AVAIL

fq5whotlevl2

R5 FQ13 ASSISSTED LVNG CARE AVAIL

fq5whotlevl3

R5 FQ13 ALZHEIMER CARE AVAIL

fq5whotlevl4

R5 FQ13 NURSING HOME CARE AVAIL

fq5whotlevl5

R5 FQ13 OTHR SPECIFY CARE AVAIL

QUESTION TEXT:

What other levels of care are available?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	INDEPENDENT LIVING	FQ15
2	ASSISTED LIVING	FQ15
3	SPECIAL CARE, MEMORY CARE, OR ALZHEIMER'S UNIT	FQ15
4	NURSING HOME	FQ15
91	OTHER (SPECIFY)	
	REFUSED	FQ15
	DON'T KNOW	FQ15

FQ13A

FQ13A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER LEVELS OF CARE

ENTER TEXT

Length

50

FQ15

fq5servaval1

R5 FQ15 MEALS AVAIL

fq5servaval2

R5 FQ15 HELP WITH MEDS AVAIL

fq5servaval3

R5 FQ15 HELP W BATH DRESS AVAIL

fq5servaval4

R5 FQ15 LAUNDRY SERVCS AVAIL

fq5servaval5

R5 FQ15 HOUSEKEEPING SERV AVAIL

fq5servaval6

R5 FQ15 TRANSPRT MED CARE AVAIL

fq5servaval7

R5 FQ15 TRANSPRT TO STORE EVENT

fq5servaval10

R5 FQ15 FITNESS CENTER AVAIL

fq5servaval11

R5 FQ15 WALKING AREA AVAIL

fq5servaval8

R5 FQ15 RECREATIONAL FAC AVAIL

fq5servaval9

R5 FQ15 SOCIAL EVENTS AVAIL

fq5servaval12

R5 FQ15 ONSITE HEALTH AVAIL

fq5servaval13

R5 FQ15 MED EMERGENCY SYSTEM AVAIL

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at FQ15a, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "at {SP}'s current level of care" and "offered" as bold underlined text.

QUESTION TEXT:

SHOW CARD FQ2

{ } We are interested in the services that are available to people at {SP}'s current level of care.
Please look at this list. { }

{{}}For each service, please tell me if the service is offered to people at {SP}'s level of care. If the service is offered, please also indicate whether it is part of {SP}'s package of services provided by {PLACE NAME from FQ5} or if there is an extra charge for it. {{}}

{variable text [a-m]}

RESPONSE [1] a. Meals (in common dining areas or in resident's own rooms)?

RESPONSE [2] b. Help with medications?

RESPONSE [3] c. Help with bathing and dressing?

RESPONSE [4] d. Laundry services for linens or clothing?

RESPONSE [5] e. Housekeeping services?

RESPONSE [6] f. A van or shuttle to doctors or other medical care providers?

RESPONSE [7] g. A van or shuttle to stores or events like concerts?

RESPONSE [8] h. An indoor fitness center?

RESPONSE [9] i. Areas to walk for pleasure or exercise, like an outdoor walking path?

RESPONSE [10] j. Other recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?

RESPONSE [11] k. Organized social events and activities?

RESPONSE [12] l. Onsite health and wellness programs?

RESPONSE [13] m. A medical emergency system to call someone for help?

CODES

- | | |
|---|---|
| 1 | YES, SERVICE PROVIDED AS PART OF PACKAGE |
| 2 | YES, SERVICE PROVIDED AT AN EXYTRA CHARGE |
| 3 | NO, SERVICE NOIT PROVIDED |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-m sequence until all rows have been displayed.

FQ16PRE	FQ16PRE	NOT ON FILE
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QUESTION TEXT:

These next questions are about the sources of payment for {SP}'s care.
PRESS 1 AND ENTER TO CONTINUE

FQ16	fq5paysourc1	R5 FQ16 SP OR SP FAMILY PAYMENT
	fq5paysourc2	R5 FQ16 SOC SEC SSI PAYMENT
	fq5paysourc3	R5 FQ16 MEDICAID PAYMENT
	fq5paysourc4	R5 FQ16 MEDICARE PAYMENT
	fq5paysourc5	R5 FQ16 PRIVATE INSURANCE PAYMNT
	fq5paysourc6	R5 FQ16 OTHR GOVT PAYMENT

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at FQ16a, do not display question text in brackets.

Otherwise, display question text in brackets.

If FQ6= 1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME), display FQ16d {Medicare}.

Display dollar amounts using commas to separate zeroes.

QUESTION TEXT:

SHOW CARD FQ3

{{In the last billing month for which you have complete payment information, what did each of these sources pay for {SP}'s care?}}

{{For each one, please tell me the total amount paid by each source for this part of {SP}'s care.}}

ENTER DOLLAR AMOUNT

ENTER ZERO IF NO PAYMENT FROM SOURCE

{variable text [a-f]}

RESPONSE [1] a. SP OR SP'S FAMILY

RESPONSE [2] b. SOCIAL SECURITY OR SSI

RESPONSE [3] c. MEDICAID

RESPONSE [4] d. MEDICARE

RESPONSE [5] e. PRIVATE INSURANCE

RESPONSE [6] f. OTHER GOVERNMENT SOURCE (VA, STATE, COUNTY)

ENTER NUMBER

Range

Soft Range

0 to 26000

REFUSED

0 to 10000

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

Display 'variable text' in the a-f sequence until all rows have been displayed.

BOX FQ17

BOX FQ17

NOT ON FILE

If DK or RF entered at FQ16 for any amount category, go to FQ18.

FQ17

fq5totalpaym

R5 FQ17 TOTAL PAYMENT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using comas to separate zeroes.

QUESTION TEXT:

That adds up to {TOTAL AMOUNT CALCULATED FROM FQ16}

Is that the total monthly payment for {SP}'s care?

CODES

1

YES

FQ19

2

NO

REFUSED

FQ19

DON'T KNOW

FQ19

FQ18

fq5mnthlyamt

R5 FQ18 TOT MTHLY AMT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using comas to separate zeroes.

QUESTION TEXT:

Display dollar amounts using commas to separate zeroes.

ENTER AMOUNT

ENTER NUMBER

Range 0 to 26000
 REFUSED
 DON'T KNOW

FQ19**fq5primpayer****R5 FQ19 PRIMARY PAYER FOR CARE****DISPLAY INSTRUCTIONS:**

If FQ6= 1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME), display {Medicare,} and response category 4.

QUESTION TEXT:

Would you say the primary payer for {SP}'s care is {SP} or {his/her} family, Social Security, Medicaid, {Medicare,} or some other source?

CODES

1	SP/FAMILY	FQ21
2	SOCIAL SECURITY/SSI	FQ21
3	MEDICAID	FQ21
4	MEDICARE	FQ21
5	OTHER SOURCE	
	REFUSED	FQ21
	DON'T KNOW	FQ21

FQ20**fq5govsource****R5 FQ20 GOVERNMENT SOURCE****QUESTION TEXT:**

Is that a government source?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

FQ21**FQ21****NOT ON FILE****QUESTION TEXT:**

I would like to confirm that {SP}'s name is {SP'S MIDDLE NAME} {SP'S LAST NAME}. Is that correct?

CODES

1	YES	FQ22
2	NO	
	REFUSED	
	DON'T KNOW	

FQ21A**FQ21A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP name in the response fields.

Display "FIRST" in bold underlined text.

Display SP first name in fill as bold underlined

QUESTION TEXT:

What is the correct spelling of {SP}'s full name?

{FIRST NAME} {MIDDLE NAME} {LAST NAME}

CORRECT FIRST NAME. CONFIRM SPELLING.

ENER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Display FQ21a, 21b, and 21c on the same screen.

FQ21B**FQ21B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "MIDDLE" in bold underlined text.

Display SP middle name in fill as bold underlined

QUESTION TEXT:

What is the correct spelling of {SP}'s full name?

{FIRST NAME} {MIDDLE NAME} {LAST NAME}

CORRECT MIDDLE NAME. CONFIRM SPELLING.

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Allow empty.

Display FQ21a, 21b, and 21c on the same screen.

FQ21C**FQ21C**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

Display SP last name in fill as bold underlined

QUESTION TEXT:

What is the correct spelling of {SP}'s full name?

{FIRST NAME} {MIDDLE NAME} {LAST NAME}

CORRECT LAST NAME. CONFIRM SPELLING.

ENER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Display FQ21a, 21b, and 21c on the same screen.

Set flag to indicate SP name was updated.

FQ22**r5dgender**

R5 D GENDER OF SP

QUESTION TEXT:

THE SP IS LISTED AS A {MALE/FEMALE}

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK: Is {SP} male or female?

CODES

- | | |
|---|--------|
| 1 | MALE |
| 2 | FEMALE |

BOX FQ22A**BOX FQ22A**

NOT ON FILE

Compare preloaded CMS gender of SP with FQ22 value just entered.
If they are the same, go to FQ23.
Otherwise, go to FQ22a

FQ22A**FQ22A**

NOT ON FILE

QUESTION TEXT:

YOU JUST CHANGED SP'S GENDER FROM {PRELOADED CMS GENDER MALE/FEMALE} TO {FEMALE/MALE FROM FQ22} DID YOU INTEND TO DO THAT?

CODES

- | | | |
|---|-----|------|
| 1 | YES | |
| 2 | NO | FQ22 |

PROGRAMMER INSTRUCTIONS:

If FQ22A = 2 (NO), display hard error message "SELECT "GO TO" TO RETURN TO IS4A AND RE-ENTER RESPONSE."

FQ23**FQ23**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded CMS DOB in the question text.

SPELL OUT MONTH WHEN DISPLAYING {BIRTH MONTH BIRTH DAY, BIRTH YEAR}.

FORMAT AS MM/DD/YYYY WHEN DISPLAYING ({BIRTH MM/BIRTH DD/BIRTH YEAR}).

QUESTION TEXT:

I also want to confirm {SP}'s birth date is {BIRTH MONTH, BIRTH DAY, BIRTH YEAR} ({BIRTH MM/BIRTHDD/BIRTH YEAR}). Is that correct?

CODES

- | | | |
|---|-----|----------|
| 1 | YES | BOX FQ26 |
| 2 | NO | |

REFUSED
DON'T KNOW

BOX FQ26
BOX FQ26

FQ24

FQ24

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded CMS DOB.

QUESTION TEXT:

What is {SP}'s date of birth?

ENTER MONTH, DAY, AND YEAR (MM-DD-YYYY)

PROGRAMMER INSTRUCTIONS:

Use mask to collect DOB. Separate mm/dd/yyyy with hyphens for data entry.

MONTH range: 1-31

DAY range 1-31

YEAR range: (CURRENT YEAR-65 – FQ24 DOB).

FQ25

r5d2intvrage

R5 D SP CAT AGE AT INTVW

DISPLAY INSTRUCTIONS:

COMPUTE AGE AS (CURRENT DATE – FQ24 DOB).

QUESTION TEXT:

I would like to confirm that {SP} is {CALCULATED AGE} years old today. Is that correct?

CODES

1 YES

2 NO

REFUSED

DON'T KNOW

FQ24

BOX FQ26

BOX FQ26

NOT ON FILE

If NEWSAMPLE flag=1 (YES), go to FQ26.

Otherwise, go to FQ29.

FQ26

fq5yourrace1 (Sensitive)

R5 FQ26 SP RACE OF SP-WHITE

fq5yourrace2 (Sensitive)

R5 FQ26 SP RACE OF SP-AFRICN AMERICN

fq5yourrace3 (Sensitive)

R5 FQ26 SP RACE OF SP-AMERICAN INDIAN

fq5yourrace4 (Sensitive)

R5 FQ26 SP RACE OF SP-ALASKA NATIVE

fq5yourrace5 (Sensitive)

R5 FQ26 SP RACE OF SP-ASIAN

fq5yourrace7 (Sensitive)

R5 FQ26 SP RACE OF SP-NATIVE HAWAIIAN

R5 FQ26 SP RACE OF SP PACIFIC ISLANDR

QUESTION TEXT:

SHOW CARD FQ4

What race does {SP} consider {himself/herself} to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, or something else?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	WHITE/CAUCASIAN	BOX FQ27
2	BLACK/AFRICAN AMERICAN	BOX FQ27
3	AMERICAN INDIAN	BOX FQ27
4	ALASK NATIVE	BOX FQ27
5	ASIAN	BOX FQ27
6	NATIVE HAWAIIAN	BOX FQ27
7	PACIFIC ISLANDER	BOX FQ27
91	OTHER (SPECIFY)	
	REFUSED	BOX FQ27
	DON'T KNOW	BOX FQ27

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

FQ26A	FQ26A	NOT ON FILE
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QUESTION TEXT:

SPECIFY OTHER RACE

ENTER TEXT

Length

75

BOX FQ27	BOX FQ27	NOT ON FILE
-----------------	-----------------	-------------

If more than one response category selected at FQ26, go to FQ27.

Otherwise, go to FQ28

FQ27	fq5primarace (Sensitive)	R2 FQ27 RACE CONSID SP PRIMRLY
-------------	---------------------------------	--------------------------------

DISPLAY INSTRUCTIONS:

Display “or” between each race in question text.

In question text, display only response categories selected at FQ26.

QUESTION TEXT:

SHOW CARD FQ4

Does SP consider {himself/herself} primarily {RESPONSE CATEGORIES SELECTED AT FQ26}?

CODES	
1	WHITE/CAUCASIAN
2	BLACK/AFRICAN AMERICAN
3	AMERICAN INDIAN
4	ALASK NATIVE
5	ASIAN
6	NATIVE HAWAIIAN
7	PACIFIC ISLANDER
91	OTHER RACE SPECIFIED AT FQ26A
	REFUSED

DON'T KNOW

FQ28

fq5hisplatno (Sensitive)

R5 FQ28 CNSDR SP HSPAN OR LATNO

QUESTION TEXT:

Does {SP} consider {himself/herself} Hispanic or Latino?

CODES

- | | |
|---|------------|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |

FQ29

FQ29

NOT ON FILE

QUESTION TEXT:

YOU HAVE COMPLETED THE FACILITY STAFF QUESTIONNAIRE. THANK RESPONDENT.

PRESS 1 AND ENTER TO CONTINUE

FQ30

FQ30

NOT ON FILE

DISPLAY INSTRUCTIONS:

If (LAST INT disposition code =61 (Final NH Complete) or LAST INT disposition code =64 (Final FQ complete, SP INT NOT COMPLETE)) and CMS DODFLAG <> 1 (SP ALIVE), display "NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE."

QUESTION TEXT:

{NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE.}

PRESS 1 AND ENTER TO RETURN TO IMS SCREEN

PROGRAMMER INSTRUCTIONS:

If FQ8=1 (YES), FACILITY NAME = text from FQ9.

Else FACILITY NAME = text from FQ5.

IMS will pull FACILITY NAME from NHATS Facility Task once task status = 20 (COMPLETE).

If FQ6 = 1 or [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) and FQ10 = 4] or FQ11 = 2, set FACILITY TYPE flag = 1 (NURSING HOME).

Otherwise, set FACILITY TYPE flag = 2 (OTHER FACILITY).

If NEWSAMPLE flag=1 (YES) and FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".

Else if LAST INT final disposition code was code 61 (FINAL NH COMPLETE) and if FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".

Else if R1 final disposition code was code 64 (FINAL FQ COMPLETE, SP NOT COMPLETE), set NHATS Interview Task=code 24 (FINAL NOT REQUIRED) and IRQ SP Task=code 24 (FINAL NOT REQUIRED); set the final case status to code 61, "Complete, NH Facility" if the FACILITY TYPE flag = 1 (NURSING HOME); set the final case status to code 64 (FINAL FQ, SP INTERVIEW NOT COMPLETED) if the FACILITY TYPE flag=2 (OTHER FACILITY).

If FACILITY TYPE flag = 1 or 2, set FACILITY flag = 1 (YES).

IMS will pull FACILITY TYPE flag and FACILITY flag from NHATS Facility Task once task status = 20 (COMPLETE) if the NHATS Interview Task=11 (READY).

Set IRQ Facility Task=code 11 (READY).

Derived Variables From Items in FQ Section	
fq5dlocsp	R5 D FQ6 6A 10 10A FOR SAMP WGT
r5dgender	R5 D GENDER OF SP
r5d2intvrage	R5 D SP CAT AGE AT INTVW