**NHATS Round 3**

**Section** | **HA** | **[HOUSEHOLD ACTIVITIES]**
---|---|---
**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**  
ha3laun  
R3 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/}; 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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ALWAYS DID IT BY SELF</td>
<td>HA2</td>
</tr>
<tr>
<td>2</td>
<td>ALWAYS DID IT TOGETHER WITH SOMEONE ELSE</td>
<td>HA2</td>
</tr>
<tr>
<td>3</td>
<td>SOMEONE ELSE ALWAYS DID IT</td>
<td>HA3A</td>
</tr>
<tr>
<td>4</td>
<td>IT VARIED (MORE THAN ONE WAY)</td>
<td>HA4</td>
</tr>
<tr>
<td>5</td>
<td>NOT DONE IN LAST MONTH</td>
<td>HA5</td>
</tr>
</tbody>
</table>

**HA1A**  
ha3launslf  
R3 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/} laundry by {yourself/himself/herself}?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
<tr>
<td>Codes</td>
<td>Code All That Apply</td>
</tr>
<tr>
<td>-------</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>MACHINE IN HOME</td>
</tr>
<tr>
<td>2</td>
<td>{MACHINE ELSEWHERE IN BUILDING}</td>
</tr>
<tr>
<td>3</td>
<td>LAUNDROMAT</td>
</tr>
<tr>
<td>4</td>
<td>SINK IN HOME</td>
</tr>
<tr>
<td>5</td>
<td>{SINK ELSEWHERE IN BUILDING}</td>
</tr>
<tr>
<td>91</td>
<td>OTHER (SPECIFY)</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

### QUESTION TEXT:

In the last month, when [you/SP] did [your/his/her] laundry, where did [you/his/her] do that? Did [you/his/her] use a machine in [your/his/her] home [or building], at a Laundromat, or what?

**SELECT ALL THAT APPLY**

---

<table>
<thead>
<tr>
<th>BOX HA3A</th>
<th>BOX HA3A</th>
<th>NOT ON FILE</th>
</tr>
</thead>
</table>

**QUESTION TEXT:**

**SPECIFY WHERE {SP} DID LAUNDRY.**

**ENTER TEXT**

Length: 50

---

**BOX HA3A**

**BOX HA3A**

**NOT ON FILE**

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

---

<table>
<thead>
<tr>
<th>HA3A</th>
<th>op3launhlp</th>
<th>R3 HA3A HELPS SP WITH LAUNDRY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>op3reltnship</td>
<td>R3 RELASHIP TO SP UPDATE AND NEW</td>
</tr>
</tbody>
</table>

**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  STEPDaugHER
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
For each roster selection/addition at HA3, set HELPEDWITHLAUNDRY flag = 1 (yes).

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
dlaunreas

R3 D LAUNDRY REASN WITH BY OTHER

DISPLAY INSTRUCTIONS:
If HA1 = 2 (always with someone else), display “with”.
If HA1 = 3 (someone else always did), display “for”.
If HA1 = 4 (varied), display “with or for”.
If HA1 = 5 (not done in last month), use null display for first sentence.

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.
Display responses in two side-by-side columns, with "HEALTH AND FUNCTIONING" and "OTHER REASON" as column headers. Display the remaining text for CODE 1 and CODE 2 as lists below each of the corresponding column headers.

QUESTION TEXT:
{What is the reason someone else did {your/SP’s} laundry {with/for/with or for} {you/him/her}?) Was that because of {your/SP’s} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES
1 HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE
2 OTHER REASON INCLUDES: SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN’T LIKE
TO DO IT
REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:
If HA4 = (HEALTH OR FUNCTIONING), set, HELATHREASONHELPWITHLAUNDRY flag = 1 (yes).

BOX HA5

BOX HA5

NOT ON FILE

If HA1a = 1 (yes by self), go to HA.
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
HELATHREASONHELPWITHLAUNDRY flag = 1 (yes), go to BOX HA7.
Otherwise, go to HA20PRE.

HA5

ha3laundif

R3 HA5 DIFF DOING LAUNDY BY SELF

DISPLAY INSTRUCTIONS:
Display "by {yourself/himself/herself}" in bold underlined text.

QUESTION TEXT:
In the last month, how much difficulty did {you/SP} have doing laundry by {yourself/himself/herself}.
Would you say none, a little, some, or a lot?

CODES
1       NONE
2       A LITTLE
3       SOME
4       A LOT
        REFUSED
        DON’T KNOW

HA6

ha3launof

R3 HA6 HOW OFTEN DO LAUNDARY

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
If [HA1 = 1 (always by self) or HA1 = 4 (varied)] and [HA5 = 2 (a little difficulty) or HA5 = 3 (some difficulty) or HA5 = 4 (a lot of difficulty)], go to HA7.

If [HA1 = 2 (always with someone else) or HA1 = 3 (someone else always did) or HA1 = 4 (varied) or HA1 = 5 (not done in last month)] and [HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes) or HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA7.

Otherwise, go to HA20PRE

DISPLAY INSTRUCTIONS:
If HA1 = 1 (always 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/him/herself] / no one was there to help or do that for [you/him/her]]?

CODES
1 YES
2 NO
REFUSED
DON’T KNOW

HA20 PREha3shop

R3 HA20 HOW YOUR SHOPPING DONE

DISPLAY INSTRUCTIONS:
If PROXY flag is null, display “1a”.
If PROXY flag = 1 (yes), display “1b”.

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

QUESTION TEXT:
SHOW CARD HA{1a/1b}

Which answer best describes how [your/SP’s] shopping got done in the last month? Did [you/he/she] always do this by [yourself/himself/herself], always do it together with someone else, did someone else always do it for [you/him/her], or did it vary?
### CODES

<table>
<thead>
<tr>
<th></th>
<th>ALWAYS DID IT BY SELF</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>HA22</td>
</tr>
<tr>
<td>2</td>
<td>ALWAYS DID IT TOGETHER WITH SOMEONE ELSE</td>
<td>HA22</td>
</tr>
<tr>
<td>3</td>
<td>SOMEONE ELSE ALWAYS DID IT</td>
<td>HA25A</td>
</tr>
<tr>
<td>4</td>
<td>IT VARIED (MORE THAN ONE WAY)</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>NOT DONE IN LAST MONTH</td>
<td>HA26</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>HA27</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>HA27</td>
</tr>
</tbody>
</table>

### HA20A

<table>
<thead>
<tr>
<th>ha3shopslf</th>
<th>R3 HA20A EVER SHOP BY YOURSELF</th>
</tr>
</thead>
</table>

#### 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

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

### HA22

<table>
<thead>
<tr>
<th>ha3howpaygr1</th>
<th>R3 HA22 PAY GROC PERS ITMS CASH</th>
</tr>
</thead>
<tbody>
<tr>
<td>ha3howpaygr2</td>
<td>R3 HA22 PAY GROC PERS ITMS CHK</td>
</tr>
<tr>
<td>ha3howpaygr3</td>
<td>R3 HA22 PAY GROC PERS ITMS DEBIT</td>
</tr>
<tr>
<td>ha3howpaygr4</td>
<td>R3 HA22 PAY GROC PERS CREDIT</td>
</tr>
<tr>
<td>ha3howpaygr5</td>
<td>R3 HA22 PAY GROC PERS FOOD STMP</td>
</tr>
<tr>
<td>ha3howpaygr6</td>
<td>R3 HA22 PAY GROC PERS SMON ELS</td>
</tr>
<tr>
<td>ha3howpaygr7</td>
<td>R3 HA22 PAY GROC PERS OTHR SPEC</td>
</tr>
</tbody>
</table>

#### 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

<table>
<thead>
<tr>
<th></th>
<th>CASH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>CHECK</td>
</tr>
<tr>
<td>3</td>
<td>DEBIT OR GIFT CARD</td>
</tr>
<tr>
<td>4</td>
<td>CREDIT CARD</td>
</tr>
<tr>
<td>5</td>
<td>FOOD STAMPS</td>
</tr>
<tr>
<td>6</td>
<td>SOMEONE ELSE PAYS</td>
</tr>
<tr>
<td>91</td>
<td>OTHER</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>
HA23

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>HA24A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DROVE</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP</td>
<td>HA24A</td>
</tr>
<tr>
<td>3</td>
<td>USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LIVES</td>
<td>HA24A</td>
</tr>
<tr>
<td>4</td>
<td>USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {NOT PROVIDED BY THE PLACE SP LIVES}</td>
<td>HA24A</td>
</tr>
<tr>
<td>5</td>
<td>TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM)</td>
<td>HA24A</td>
</tr>
<tr>
<td>6</td>
<td>TOOK A TAXI</td>
<td>HA24A</td>
</tr>
<tr>
<td>7</td>
<td>WALKED</td>
<td>HA24A</td>
</tr>
<tr>
<td>91</td>
<td>OTHER (SPECIFY)</td>
<td>HA24A</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>HA24A</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>HA24A</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>HA23A</th>
<th>HA23A</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NOT ON FILE</td>
</tr>
</tbody>
</table>

QUESTION TEXT:
SPECIFY HOW GOT TO STORE.

ENTER TEXT

| Length | 50 |

**HA24A**  ha3shopcart  R3 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**  ha3shoplean  R3 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**  op3shoplp  R3 HA25A HELPS SP WITH SHOPPING

**op3reltnshp**  R3 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

NHATS Round 3 :: HA
04/08/2019
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

ha3dshopreas

R3 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}’s} Was that because of {your/SP’s} health or functioning or some other reason?

SELECT ALL THAT APPLY

CODES

<table>
<thead>
<tr>
<th>Codes</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE</td>
</tr>
<tr>
<td>2</td>
<td>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</td>
</tr>
</tbody>
</table>
**DON'T KNOW**

**BOX HA27**

**PROGRAMMER INSTRUCTIONS:**
If HA26 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHSHOPPING flag = 1 (yes).

**BOX HA27**

| 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. |

**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**

**ha3shopoft**

**R3 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**

| If [HA20 = 1 (always by self) or HA20 = 4 (varied)] and [HA27 = 2 (a little) or HA27 = 3 (some) or HA27 = 4 (a lot)], go to HA29. |
| If [HA20 = 2 (always with someone else) or HA20 = 3 (some else always did) or HA20 = 4 (varied) or HA20 = 5 (not done in last month)] and [HEALTHREASONHELPWITHSHOPPING flag = 1 (yes)] or |
HELPED WITH SHOPPING flag = 1 (YES) for SERVICE/SOMONE FROM PLACE SP LIVES, go to HA29.
Otherwise go to HA30PRE.

**HA29**

**ha3 shopwout**

R3 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**

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

**HA30PRE**

**ha3 meal**

R3 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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ALWAYS DID IT BY SELF</td>
</tr>
<tr>
<td>2</td>
<td>ALWAYS DID IT TOGETHER WITH SOMEONE ELSE</td>
</tr>
<tr>
<td>3</td>
<td>SOMEONE ELSE ALWAYS DID IT</td>
</tr>
<tr>
<td>4</td>
<td>IT VARIED (MORE THAN ONE WAY)</td>
</tr>
<tr>
<td>5</td>
<td>NOT DONE IN LAST MONTH</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**HA33**
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

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 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  ALWAYS
2  MOST TIMES
3  SOME TIMES
4  RARELY
5  NEVER
   REFUSED
   DON’T KNOW

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?
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**  ha3oftmrcrow  **R3 HA31 OFTEN USE THE MICROWAVE**

**QUESTION TEXT:**
SHOW CARD HA4
In the last month, when {you/SP} made hot meals did {you/they} 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

**BOX HA32A**  **BOX HA3A**  **NOT ON FILE**

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

**HA32A**  op3mealhp  **R3 HA32A HELPS SP WITH MEALS**
op3reltnshp  **R3 RELATIONSHIP 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} or for {you/him/her}?"
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}? or who made hot meals for {you/SP} or 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?] CONIRM 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).
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

**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**

<table>
<thead>
<tr>
<th>CODES</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE</td>
</tr>
<tr>
<td>2</td>
<td>OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE LIKED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

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

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**

**ha3dmealdif**

R3 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**

**ha3mealoft**

R3 HA35 HOW OFTEN MAKE HOT MEALS

**DISPLAY INSTRUCTIONS:**

Display "a year ago" in bold underlined text.

**QUESTION TEXT:**

Compared to a year ago, [do you/does SP] make hot meals more often, less often, or about the same?

**CODES**

1. MORE OFTEN
2. LESS OFTEN
3. SAME
   REFUSED
   DON'T KNOW

**BOX HA36**

**BOX HA36**

NOT ON FILE

If [HA30 = 1 (always by self) or HA30 = 4 (varied)] and [HA34 = 2 (a little) or HA34 = 3 (some) or HA34 = 4 (a lot)], go to HA36.

If [HA30 = 2 (always with someone else) or HA30 = 3 (some else always did) or HA30 = 4 (varied) or HA30 = 5 (not done in last month)] and [HEALTHREASONHELPWITHMEALS flag = 1 (yes) or HELPEDWITHMEALS flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES] go to HA36.

Otherwise go to HA40PRE.

**HA36**

**ha3mealwout**

R3 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

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>REFUSED</td>
</tr>
</tbody>
</table>

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 ha3bank R3 HA40 HOW BILLS BANKING 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

<table>
<thead>
<tr>
<th></th>
<th>ALWAYS DID IT BY SELF</th>
<th>ALWAYS DID IT TOGETHER WITH SOMEONE ELSE</th>
<th>SOMEONE ELSE ALWAYS DID IT</th>
<th>IT VARIED (MORE THAN ONE WAY)</th>
<th>NOT DONE IN LAST MONTH</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HA44</td>
<td>HA42A</td>
<td>HA42A</td>
<td>HA43</td>
<td>HA44</td>
<td>HA44</td>
<td>HA44</td>
</tr>
</tbody>
</table>

HA40A ha3bankslf R2 HA40A HNDL BILLS BANKING YRSLF

DISPLAY INSTRUCTIONS:
Display "by yourself/himself/herself" in bold underlined text.

QUESTION TEXT:
In the last month, did {you/SP} ever handle your bills and banking by yourself/himself/herself?
1  YES
2  NO
   REFUSED
   DON’T KNOW

### HA42A

**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  STEPDaugther
8  STEPSon
9  SISTER
10 BROTHER
11 SISTER-IN-LAW
12 BROTHER-IN-LAW
13 MOTHER
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>STEPMOTHER</td>
</tr>
<tr>
<td>15</td>
<td>MOTHER-IN-LAW</td>
</tr>
<tr>
<td>16</td>
<td>FATHER</td>
</tr>
<tr>
<td>17</td>
<td>STEPFATHER</td>
</tr>
<tr>
<td>18</td>
<td>FATHER-IN-LAW</td>
</tr>
<tr>
<td>19</td>
<td>GRANDDAUGHTER</td>
</tr>
<tr>
<td>20</td>
<td>GRANDSON</td>
</tr>
<tr>
<td>21</td>
<td>NIECE</td>
</tr>
<tr>
<td>22</td>
<td>NEPHEW</td>
</tr>
<tr>
<td>23</td>
<td>AUNT</td>
</tr>
<tr>
<td>24</td>
<td>UNCLE</td>
</tr>
<tr>
<td>25</td>
<td>COUSIN</td>
</tr>
<tr>
<td>26</td>
<td>STEPDAUGHTER’S SON/DAUGHTER</td>
</tr>
<tr>
<td>27</td>
<td>STEPSON’S SON/DAUGHTER</td>
</tr>
<tr>
<td>28</td>
<td>DAUGHTER-IN-LAW’S SON/DAUGHTER</td>
</tr>
<tr>
<td>29</td>
<td>SON-IN-LAW’S SON/DAUGHTER</td>
</tr>
<tr>
<td>30</td>
<td>BOARDER/RENTER</td>
</tr>
<tr>
<td>31</td>
<td>PAID AIDE/HOUSEKEEPER/EMPLOYEE</td>
</tr>
<tr>
<td>32</td>
<td>ROOMMATE</td>
</tr>
<tr>
<td>33</td>
<td>EX-WIFE/EX-HUSBAND</td>
</tr>
<tr>
<td>34</td>
<td>BOYFRIEND/GIRLFRIEND</td>
</tr>
<tr>
<td>35</td>
<td>NEIGHBOR</td>
</tr>
<tr>
<td>36</td>
<td>FRIEND</td>
</tr>
<tr>
<td>37</td>
<td>SOMEONE/SERVICE AT THE PLACE SP LIVES/LIVED</td>
</tr>
<tr>
<td>38</td>
<td>CO-WORKER</td>
</tr>
<tr>
<td>39</td>
<td>MINISTER, PRIEST, OR OTHER CLERGY</td>
</tr>
<tr>
<td>40</td>
<td>PSYCHIATRIST, PSYCHOLOGIST, COUNSELOR, OR THERAPIST</td>
</tr>
<tr>
<td>91</td>
<td>OTHER RELATIVE</td>
</tr>
<tr>
<td>92</td>
<td>OTHER NONRELATIVE</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
For each roster selection/addition at HA25, set HELPEDWITHBANKING flag = 1 (yes).

<table>
<thead>
<tr>
<th>BOX HA43</th>
<th>BOX HA43</th>
<th>NOT ON FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>If HA40 = 2 (always with someone else) HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA45.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If HA40 = 3 (someone else always did) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA46.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If HA40 = 4 (varied) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA44.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Otherwise go to HA43.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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/[his/her]?} Was that because of {your/[his/her]} health or functioning or some other reason?}

**SELECT ALL THAT APPLY**

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HEALTH OR FUNCTIONING INCLUDES: AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE</td>
</tr>
<tr>
<td>2</td>
<td>OTHER REASON INCLUDES: SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

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

---

**BOX HA44**

If HA40 = 1 (by self), go to HA44.
If HA40 = 2 (always with someone else) or HA40 ≠ 1 (didn’t do by self), go to HA45.
If [HA40 = 3 (someone else always did) or HA40 = 5 (not done in last month)] and HEALTHREASONHELPWITHBANKING flag =1 (yes), go to BOX HA46.
Otherwise, go to HA50PRE.

---

**HA44**

ha3bankdif

R3 HA44 DIF HNDL BILLS BNKING SLF

**DISPLAY INSTRUCTIONS:**

Display "by {yourself/himself/herself}" in bold underlined text.

**QUESTION TEXT:**

In the last month, how much difficulty did {you/SP} have handling {your/his/her} bills and banking by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>NONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>A LITTLE</td>
</tr>
<tr>
<td>3</td>
<td>SOME</td>
</tr>
<tr>
<td>4</td>
<td>A LOT</td>
</tr>
<tr>
<td>5</td>
<td>REFUSED</td>
</tr>
<tr>
<td>6</td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

---

**HA45**

ha3bankoft

R3 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

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 HELDEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA46.

Otherwise go to HA50PRE.

HA46

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

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
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
REFUSED
DON'T KNOW
SECTION SC
SECTION SC
SECTION SC

HA51
SECTION SC

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
REFUSED
DON'T KNOW
SECTION SC
SECTION SC
SECTION SC

HA52A
SECTION SC

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
41      OTHER RELATIVE
42      OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:
For each roster selection/addition at HA25, set HELPEDWITHMONEYMATERS flag = 1 (yes).
### Derived Variables from Items in HA Section

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ha3dlaunsfdf</td>
<td>R3 D LAUNDRY SELF AND DIFF LEVEL</td>
</tr>
<tr>
<td>ha3dshopsfdf</td>
<td>R3 D SLF SHOPPING AND DIFF LEVEL</td>
</tr>
<tr>
<td>ha3dmealsfdf</td>
<td>R3 D SELF MEALS AND DIFF LEVEL</td>
</tr>
<tr>
<td>ha3dbanksfdf</td>
<td>R3 D SELF BANKS AND DIFF LEVEL</td>
</tr>
<tr>
<td>ha3dmealwhl</td>
<td>R3 D SP RECEIVES MEALS ON WHEELS</td>
</tr>
<tr>
<td>ha3dmealtkot</td>
<td>R3 D SP RECEIVES TAKE OUT MEALS</td>
</tr>
<tr>
<td>ha3dlaunreas</td>
<td>R3 D LAUNDRY REASN WITH BY OTHERS (see HA4)</td>
</tr>
<tr>
<td>ha3dshopreas</td>
<td>R3 D SHOP REASN WITH BY OTHERS (see HA26)</td>
</tr>
<tr>
<td>ha3dmealreas</td>
<td>R3 D MEALS REASN WITH OTHERS (see HA33)</td>
</tr>
<tr>
<td>ha3dbankreas</td>
<td>R3 D BANK BILL REASON WITHBY OTH (see HA43)</td>
</tr>
</tbody>
</table>