**NHATS Round 5**

**Section** | **EW** | **[ECONOMIC WELL-BEING]**  
--- | --- | ---  
EW1 |ew5pycredbal | R5 EW1 PAY OFF CREDIT CARD BALAN  
**DISPLAY INSTRUCTIONS:**  
If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".  
Otherwise display "Does SP".  
If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]".  
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".  
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".  
If HP2 = 2 (HAVE TRADITIONAL MORTGAGE) or HP2 = 3 (HAVE REVERSE MORTGAGE), display "other kinds of".  
**QUESTION TEXT:**  
These next questions are about {other kinds of} debt.  
{Do you/Does SP} {or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]} usually pay off all credit card balances every month or only the minimum amount due?  
**CODES**  
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>EW5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PAY OFF BALANCE</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>PAY MINIMUM</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>PAY MORE THAN MINIMUM, BUT NOT ENTIRE BALANCE</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DON'T HAVE ANY CREDIT CARDS</td>
<td>EW5</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

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**  
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LESS THAN $1,000</td>
</tr>
<tr>
<td>2</td>
<td>$1,000 TO LESS THAN $2,000</td>
</tr>
<tr>
<td>3</td>
<td>$2,000 TO LESS THAN $4,000</td>
</tr>
<tr>
<td>4</td>
<td>$4,000 TO LESS THAN $6,000</td>
</tr>
<tr>
<td>5</td>
<td>$6,000 TO LESS THAN $10,000</td>
</tr>
<tr>
<td>6</td>
<td>$10,000 TO LESS THAN $20,000</td>
</tr>
<tr>
<td>7</td>
<td>$20,000 OR MORE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

EW3 |ew5credcdmed | R5 EW3 CREDIT CARD MEDICAL CARE  
**QUESTION TEXT:**
Is any of the amount owed on credit cards for medical care?

**CODES**

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

**EW4**  
**ew5amtcrdmed**  
*R5 EW4 AMT ON CARDS FOR MED CARE*

**QUESTION TEXT:**

How much is for medical care? Would you say most, some, or a little of the amount owed?

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MOST</td>
</tr>
<tr>
<td>2</td>
<td>SOME</td>
</tr>
<tr>
<td>3</td>
<td>A LITTLE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**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**

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

**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**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LESS THAN $500</td>
</tr>
</tbody>
</table>
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 FROM 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**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td>EW11</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>EW11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>EW11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>EW11</td>
<td></td>
</tr>
</tbody>
</table>

**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".

Page 3 of 9  
NHATS Round 5 :: EW  
4/8/2019
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} {SP FIRSTNAME/LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME’S} children or someone else who helped out (financially)?

**SELECT ALL THAT APPLY**

**CODES**

1. CHILD/CHILDREN
2. SOMEONE ELSE
   - EW10 REFUSED
   - EW10 DON’T KNOW

**PROGRAMMER INSTRUCTIONS:**
Allow code all that apply.

**EW9**
op5chlpfin

**DISPLAY INSTRUCTIONS:**
Display PERSON ROSTER members with relationship codes = 3 (DAUGHTER), 4 = (SON), 7 (STEPDAUGHTER), or 8 (STEPSON) with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP.

**QUESTION TEXT:**
Which children helped out (financially)?

PROBE: Any other children?

**SELECT ALL THAT APPLY**

**ENTER TEXT**

**PROGRAMMER INSTRUCTIONS:**
Allow code all that apply.

For each roster selection at EW9, set HELPEDSPFINANCIALLY flag =1 (YES) to person roster.

**EW10**
ew5atchhelyr

**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
   REFUSED
   DON'T KNOW

EW12  ew5whregoth1  R5 EW12 GAVE CHILD FINCL HLP
EW12  ew5whregoth2  R5 EW12 SP GAVE GRANDCHD FIN HLP
EW12  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

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.
**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>EW14</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CHILD/CHILDREN</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>GRANDCHILD/GRANDCHILDREN</td>
<td>EW14</td>
</tr>
<tr>
<td>3</td>
<td>SOMEONE ELSE</td>
<td>EW14</td>
</tr>
<tr>
<td>4</td>
<td>REFUSED</td>
<td>EW14</td>
</tr>
<tr>
<td>5</td>
<td>DON’T KNOW</td>
<td>EW14</td>
</tr>
</tbody>
</table>

**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**

**ew5amthlpgive**

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 \( \text{CURRENT YEAR} - 1 \).

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LESS THAN $500</td>
</tr>
<tr>
<td>2</td>
<td>$500 TO LESS THAN $1,000</td>
</tr>
<tr>
<td>3</td>
<td>$1,000 TO LESS THAN $2,000</td>
</tr>
<tr>
<td>4</td>
<td>$2,000 TO LESS THAN $4,000</td>
</tr>
<tr>
<td>5</td>
<td>$4,000 TO LESS THAN $6,000</td>
</tr>
<tr>
<td>6</td>
<td>$6,000 TO LESS THAN - $10,000</td>
</tr>
<tr>
<td>7</td>
<td>$10,000 TO LESS THAN $20,000</td>
</tr>
<tr>
<td>8</td>
<td>$20,000 OR MORE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**BOX EW15**

**BOX E15**

NOT ON FILE
Go to EW15.

**EW15**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ew5progneed1</td>
<td>R5 EW15 SP RECEIVED FOOD STAMPS</td>
</tr>
<tr>
<td>ew5progneed2</td>
<td>R5 EW15 SP RECEIVED OTHER FOOD ASSISTANCE</td>
</tr>
<tr>
<td>ew5progneed3</td>
<td>R5 EW15 SP RECEIVED GAS ENERGY ASSISTANCE</td>
</tr>
</tbody>
</table>

**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[abc].

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:**

```{||"{}Th"e"r"e" "a"r"e" s"e"v"e"r"a"l" s"t"a"t"e" a"n"d f"e"d"e"r"a"l p"r"o"g"r"a"m"s t"h"a"t h"e"l"p p"e"o"p"l"e i"n n"e"e"d. I"n t"h"e l"a"s"t y"e"a"r, d"i"d {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**

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

**PROGRAMMER INSTRUCTIONS:**

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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ew5mealskip1</td>
<td>R5 EW16 SKIP MEALS NO MONEY</td>
</tr>
</tbody>
</table>

**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:**

```{||"W"e" k"n"o"w p"e"o"p"l"e s"o"m"t"i"m"e"s f"i"n"d i"t h"a"r"d t"o m"a"k"e e"n"d"s m"e"e"t. T"h"i"n"k"i"n"g a"b"o"u"t t"h"e l"a"s"t m"o"n"t"h," d"i"d {you/SP} |
```

We know people sometimes find it hard to make ends meet. Thinking about the last month, did {you/SP}
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

<table>
<thead>
<tr>
<th></th>
<th>NEARLY EVERY DAY</th>
<th>MORE THAN HALF THE DAYS</th>
<th>SEVERAL DAYS (LESS THAN HALF)</th>
<th>A FEW DAYS</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

EW18

### DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display for EW18a-c.

Display "last year" in underlined text.

### 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.