**NHATS Round 1**

Section | HA | [HOUSEHOLD ACTIVITIES] | Sequence: 23

| HA1PRE | HA1PRE | NOT IN FILE |

**QUESTION TEXT:**

Next I have a few questions about chores around {your/SP’s} {home/apartment/room/unit/suite/other} and how they got done in the last month.

PRESS 1 AND ENTER TO CONTINUE

| HA1 | ha1blaun | R1 HA1 HOW LAUNDRY GOT DONE |

**DISPLAY INSTRUCTIONS:**

Display HA1, HA1A, HA2, HA2A on same screen.

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

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

**QUESTION TEXT:**

SHOW CARD HA{1a/1b}

Let’s start with {your/SP’s} laundry. By laundry we mean cleaning {your/[his/her]} clothing, sheets, and towels.

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

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Code All That Apply</th>
<th>HA1</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></td>
</tr>
<tr>
<td>5</td>
<td>NOT DONE IN LAST MONTH</td>
<td>HA4</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>HA5</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>HA5</td>
</tr>
</tbody>
</table>

| HA1A | ha1launsIf | R1 HA1A DO LAUNDRY YOURSELF |

**DISPLAY INSTRUCTIONS:**

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

**QUESTION TEXT:**

In the last month, did {you/SP} ever do {your/[his/her]} laundry by {yourself/himself/herself}?
CODES

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON’T KNOW</th>
</tr>
</thead>
</table>

HA2

<table>
<thead>
<tr>
<th>ha1whrmachi1</th>
<th>R1 HA2 WASH MACHINE IN HOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>ha1whrmachi2</td>
<td>R1 HA2 WASH MACHINE IN BUILDING</td>
</tr>
<tr>
<td>ha1whrmachi3</td>
<td>R1 HA2 WASH MACHINE LAUNDROMAT</td>
</tr>
<tr>
<td>ha1whrmachi4</td>
<td>R1 HA2 WASH MACHINE SINK IN HOME</td>
</tr>
<tr>
<td>ha1whrmachi5</td>
<td>R1 HA2 WASH MACHINE SINK IN BUILDNG</td>
</tr>
<tr>
<td>ha1whrmachi6</td>
<td>R1 HA2 WASH MACHINE OTHR SPECIFY</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<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>92</td>
<td>REFUSED</td>
</tr>
<tr>
<td>93</td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

HA2A

| HA2A | NOT IN FILE |

SPECIFY WHERE {SP} DID LAUNDRY.

ENTER TEXT

Length

BOX HA3A

| HA3A | NOT IN FILE |

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

HA3A

<table>
<thead>
<tr>
<th>op1launhlp</th>
<th>R1 HA3A HELPS SP WITH LAUNDRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>op1reltnshp</td>
<td>R1 OTHR PRSN RELATIONSHIP TO SP</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 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

<table>
<thead>
<tr>
<th>CODES</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>SPOUSE/PARTNER</td>
</tr>
<tr>
<td>3</td>
<td>DAUGHTER</td>
</tr>
<tr>
<td>4</td>
<td>SON</td>
</tr>
<tr>
<td>5</td>
<td>DAUGHTER-IN-LAW</td>
</tr>
<tr>
<td>6</td>
<td>SON-IN-LAW</td>
</tr>
<tr>
<td>7</td>
<td>STEPDAUGHTER</td>
</tr>
<tr>
<td>8</td>
<td>STEPSON</td>
</tr>
<tr>
<td>9</td>
<td>SISTER</td>
</tr>
<tr>
<td>10</td>
<td>BROTHER</td>
</tr>
<tr>
<td>11</td>
<td>SISTER-IN-LAW</td>
</tr>
<tr>
<td>12</td>
<td>BROTHER-IN-LAW</td>
</tr>
<tr>
<td>13</td>
<td>MOTHER</td>
</tr>
<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>
</tbody>
</table>
GRANDDAUGHTER
GRANDSON
NIECE
NEPHEW
AUNT
UNCLE
COUSIN
STEPDAUGHTER'S SON/DAUGHTER
STEPSON'S SON/DAUGHTER
DAUGHTER-IN-LAW'S SON/DAUGHTER
SON-IN-LAW'S SON/DAUGHTER
BOARDER/RENTER
PAID AIDE/HOUSEKEEPER/EMPLOYEE
ROOMMATE
EX-WIFE/EX-HUSBAND
BOYFRIEND/GIRLFRIEND
NEIGHBOR
FRIEND
SERVICE/SOMEONE FROM THE PLACE SP LIVES
OTHER RELATIVE
OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

<table>
<thead>
<tr>
<th>BOX HA4</th>
<th>BOXHA4</th>
<th>NOT IN FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>If HA1 = 2 (always with someone else) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to HA6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If HA1 = 3 (someone else always did) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA7.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If HA1 = 4 (varied) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Otherwise go to HA4.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

HA4

ha1dlaunreas

R1 D LAUNDRY REASN WITH BY OTHER

DISPLAY INSTRUCTIONS:

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

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.
Display responses in two side-by-side columns.

QUESTION TEXT:

What is the reason someone else did {your/SP’s} laundry {with/for/with or for} {you/him/her}? Was that because of {your/SP’s} health or functioning or some other reason?
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
BOXHA5 NOT IN FILE

If HA1a = 1 (yes by self), go to HA5.
If HA1 = 2 (always with someone else) or HA1a ≠ 1 (didn’t do by self), go to HA6.

[If HA1 = 3 (someone else always did) or HA1 = 5 (not done in last month)] and
HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes), go to BOX HA7.

Otherwise, go to HA20PRE.

HA5 ha1laundif R1 HA5 DIFF DOING LAUNDY BY SELF

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

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

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

HA6 ha1launoft R1 HA6 HOW OFTEN DO LAUNDRY

DISPLAY INSTRUCTIONS:
   Display "a year ago" in bold underlined text.

QUESTION TEXT:
Compared to a year ago, {do you/does SP} do {your/[his/her]} laundry more often, less often, or about the same?

**CODES**

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

**BOX HA7**

<table>
<thead>
<tr>
<th>BOXHA7</th>
<th>NOT IN FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Otherwise, go to HA20PRE.</td>
<td></td>
</tr>
</tbody>
</table>

**HA7**

- ha1launwout

**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
3. REFUSED
4. DON'T KNOW

**HA20PRE**

<table>
<thead>
<tr>
<th>HA20PRE</th>
<th>NOT IN FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUESTION TEXT:</td>
<td></td>
</tr>
<tr>
<td>The next few questions are about shopping for groceries or personal items.</td>
<td></td>
</tr>
<tr>
<td>IF NEEDED: By personal items, we mean things like toiletries that you can buy at the grocery or drug store.</td>
<td></td>
</tr>
<tr>
<td>PRESS 1 AND ENTER TO CONTINUE</td>
<td></td>
</tr>
</tbody>
</table>
HA20

**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>Code</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ALWAYS DID IT BY SELF</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>HA26</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

**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>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>

HA22

**QUESTION TEXT:**
SHOW CARD HA2
In the last month, when {you/SP} shopped for groceries or other personal items, did {you/he/she}] pay for them with cash, check, debit card, credit card, or some other way?

SELECT ALL THAT APPLY

CODES
1  CASH
2  CHECK
3  DEBIT OR GIFT CARD
4  CREDIT CARD
5  FOOD STAMPS
6  SOMEONE ELSE PAYS
91 OTHER
99 REFUSED
999 DON’T KNOW

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

DISPLAY INSTRUCTIONS:

If DT1 = 1 (drives every day), 2 (drives most days), 3 (drives some days) or 4 (rarely) OR DROVEINLASTYEAR flag = 1 (yes), display “drive,” and response 1.

If FACILITY flag = 1 (yes), display “use a service provided by the place where {you live/he/she} lives,”.

If FACILITY flag = 1 (yes) or RETIREMENTCOMMUNITY flag = 1 (YES), display response 3 and for response 4, “not provided by the place SP lives”.

DISPLAY “In the last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD HA3

In the last year, how did {you/SP} get to the store to shop for groceries or personal items? Did {you/he/she} {drive,] get a ride from a family member or friend, {use a service provided by the place where {you live/he/she} lives,] or what?

SELECT ALL THAT APPLY

CODES
1  {DROVE}  HA24A
2  GOT A RIDE FROM A FAMILY MEMBER OR FRIEND  HA24A
   OR SOMEONE PAID TO HELP
3  {USED A VAN OR SHUTTLE SERVICE PROVIDED BY  HA24A
<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>The place SP lives; 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>Took public transportation (the bus, subway, train, or tram)</td>
<td>HA24A</td>
</tr>
<tr>
<td>Took a taxi</td>
<td>HA24A</td>
</tr>
<tr>
<td>Other (specify)</td>
<td>HA24A</td>
</tr>
<tr>
<td>Refused</td>
<td>HA24A</td>
</tr>
<tr>
<td>Don't know</td>
<td>HA24A</td>
</tr>
</tbody>
</table>

**HA23A**

**Enter Text**

Length: 50

**HA24A**

**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**

**Display Instructions:**

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

**Question Text:**

In the last month, when [you/SP] went to the store to shop, did [you/he/she] ever lean on the shopping cart to help [you/him/her] get around the store?

**Codes**

1. YES
2. NO
   - Refused
   - Don't know

**Box HA25A**

**BoxHA25A**

Not in file
If HA20 = 1 (always by self) go to HA27.
Otherwise, go to HA25A.

**HA25A**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>SPouse/Partner</td>
</tr>
<tr>
<td>3</td>
<td>Daughter</td>
</tr>
<tr>
<td>4</td>
<td>Son</td>
</tr>
<tr>
<td>5</td>
<td>Daughter-In-Law</td>
</tr>
<tr>
<td>6</td>
<td>Son-In-Law</td>
</tr>
<tr>
<td>7</td>
<td>Stepdaughter</td>
</tr>
<tr>
<td>8</td>
<td>Stepson</td>
</tr>
<tr>
<td>9</td>
<td>Sister</td>
</tr>
<tr>
<td>10</td>
<td>Brother</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

If FACILITY flag = 1 (YES), display “a staff person from the place where {you live/[he/she] lives}.”

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES on the PERSON ROSTER.

If HA20 = 2 (always with someone else), display “when {you/SP} shopped for groceries or personal items, who did that with {you/[him/her]}”.

If HA20 = 3 (someone else always did), display “who shopped for groceries or personal items for {you/SP}”.

If HA20 = 4 (varied), display “who shopped for groceries or personal items with {you/SP} or for {you/[him/her]}”.

Display “first” and “last” in underlined text

**QUESTION TEXT:**

In the last month, {when {you/SP} shopped for groceries or personal items, who did that with {you/[him/her]} / who shopped for groceries or personal items for {you/SP} / who shopped for groceries or personal items with {you/SP} or for you/[him/her]}?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/[he/she] lives},} or someone paid to help {you/[him/her]}.  

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>SPouse/Partner</td>
</tr>
<tr>
<td>3</td>
<td>Daughter</td>
</tr>
<tr>
<td>4</td>
<td>Son</td>
</tr>
<tr>
<td>5</td>
<td>Daughter-In-Law</td>
</tr>
<tr>
<td>6</td>
<td>Son-In-Law</td>
</tr>
<tr>
<td>7</td>
<td>Stepdaughter</td>
</tr>
<tr>
<td>8</td>
<td>Stepson</td>
</tr>
<tr>
<td>9</td>
<td>Sister</td>
</tr>
<tr>
<td>10</td>
<td>Brother</td>
</tr>
</tbody>
</table>
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  STEPDaugHER'S SON/DAUGHTER
27  STEPSON'S SON/DAUGHTER
28  DAUGHTER-IN-LAW'S SON/DAUGHTER
29  SON-IN-LAW'S SON/DAUGHTER
30  BOARDER/RENTER
31  PAID AIDE/HOUSEKEEPER/EMPLOYEE
32  ROOMMATE
33  EX-WIFE/EX-HUSBAND
34  BOYFRIEND/GIRLFRIEND
35  NEIGHBOR
36  FRIEND
37  SERVICE/SOMEONE FROM THE PLACE SP LIVES
91  OTHER RELATIVE
92  OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

BOX HA26

BOXHA26

NOT IN FILE

If HA20 = 2 (always with someone else) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA28.

If HA20 = 3 (someone else always did) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA29.

If HA20 = 4 (varied) and HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA27.

Otherwise go to HA26.

HA26

ha1dshopreas

R1 D SHOP REASN WITH BY OTHERS

DISPLAY INSTRUCTIONS:

If HA20 = 2 (always with someone else), display “with”.
If HA20 = 3 (someone else always did), display “for”.
If HA20 = 4 (varied), display “with or for”.
If HA20 = 5 (not done in last month), use null display for first sentence.

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.
Display responses in two side-by-side columns.

**QUESTION TEXT:**

{What is the reason someone else shopped for groceries or personal items {with/for/with or for} {you/SP}?}
Was that because of {your/SP’s} health or functioning or some other reason?

**SELECT ALL THAT APPLY**

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</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 LIKETO DO IT) REFUSED BOX HA27 DON’T KNOW BOX HA27</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

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

**BOX HA27**

**BOXHA27**

**NOT IN FILE**

If HA20a = 1 (yes by self), go to HA27.
If HA20 = 2 (always with someone else) or HA20a 8 (didn’t do by self), go to HA28.
If [HA20 = 3 (someone else always did) or HA20 = 5 (not done in last month)] and HEALTHREASONHELPWITHSHOPPING flag =1 (yes), go to BOX HA29.
Otherwise go to HA30PRE.

**HA27**

**ha1shopdif**

**R1 HA27 DIFF SHOPPING BY SELF**

**DISPLAY INSTRUCTIONS:**

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

**QUESTION TEXT:**

In the last month, how much difficulty did {you/SP} have shopping for groceries or personal items by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NONE</td>
</tr>
<tr>
<td>2</td>
<td>A LITTLE</td>
</tr>
<tr>
<td>3</td>
<td>SOME</td>
</tr>
<tr>
<td>4</td>
<td>A LOT REFUSED DON’T KNOW</td>
</tr>
</tbody>
</table>
**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?

<table>
<thead>
<tr>
<th>CODES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MORE OFTEN</td>
</tr>
<tr>
<td>2</td>
<td>LESS OFTEN</td>
</tr>
<tr>
<td>3</td>
<td>SAME</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**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 HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMONE FROM PLACE SP LIVES, go to HA29.

Otherwise go to HA30PRE.

**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}]}?

<table>
<thead>
<tr>
<th>CODES</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>

**HA30PRE**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NOT IN FILE</td>
</tr>
</tbody>
</table>
QUESTION TEXT:
Now let’s turn to making hot meals.
PRESS 1 AND ENTER TO CONTINUE

HA30  ha1meal  R1 HA30 HOW HOT MEALS GET MADE

DISPLAY INSTRUCTIONS:
If PROXY flag is null, display “1a”.
If PROXY flag = 1 (yes), display “1b”.
Display “in the last month” in bold underlined text.

QUESTION TEXT:
SHOW CARD HA{1a/1b}
Which answer best describes how {your/SP’s} hot meals got made in the last month? Did {you/he/she} always make them by {yourself/himself/herself}, always make them together with someone else, did someone else always make them for {you/her/him}, or did it vary?

CODES
1  ALWAYS DID IT BY SELF                           HA30B
2  ALWAYS DID IT TOGETHER WITH SOMEONE ELSE        HA30B
3  SOMEONE ELSE ALWAYS DID IT                      HA30B
4  IT VARIED (MORE THAN ONE WAY)                   HA30B
5  NOT DONE IN LAST MONTH                          HA33
     REFUSED                                       HA34
     DON’T KNOW                                   HA34

HA30A  ha1mealslf  R1 HA30A MAKE HOT MEALS YOURSELF

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

QUESTION TEXT:
In the last month, did {you/SP} ever make {your/[his/her]} hot meals by {yourself/himself/herself}?

CODES
1  YES
2  NO
     REFUSED
     DON’T KNOW

HA30B  ha1restamels  R1 HA30B OFTN HAV RESTARNT MEALS

DISPLAY INSTRUCTIONS:
If FACILITY flag = 1 (yes), display “Do not include meals provided as a service by the place {you live/[he/she] lives}.”

QUESTION TEXT:
SHOW CARD HA4

In the last month, when {you/SP} had hot meals, how often were they restaurant meals, including eat-in, take-out, or delivered meals? [Do not include meals provided as a service by the place {you live/he/she} lives]. Was it every time {you/he/she} had a hot meal, most times, sometimes, rarely, or never?

<table>
<thead>
<tr>
<th>CODES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EVERY TIME</td>
</tr>
<tr>
<td>2</td>
<td>MOST TIMES</td>
</tr>
<tr>
<td>3</td>
<td>SOMETIMES</td>
</tr>
<tr>
<td>4</td>
<td>RARELY</td>
</tr>
<tr>
<td>5</td>
<td>NEVER</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

BOX HA31

If HA30 = 3 (SOMEONE ELSE ALWAYS DID IT), go to HA32A.
Else if HA14 = 1 (has microwave), go to HA31.
Otherwise, go to BOX HA32A

HA31

ha1oftmicrow

R1 HA31 OFTEN USE THE MICROWAVE

QUESTION TEXT:

SHOW CARD HA4

In the last month, when {you/SP} made hot meals did {you/he/she} use the microwave oven every time, most times, sometimes, rarely, or never?

<table>
<thead>
<tr>
<th>CODES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EVERY TIME</td>
</tr>
<tr>
<td>2</td>
<td>MOST TIMES</td>
</tr>
<tr>
<td>3</td>
<td>SOMETIMES</td>
</tr>
<tr>
<td>4</td>
<td>RARELY</td>
</tr>
<tr>
<td>5</td>
<td>NEVER</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

BOX HA32A

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

HA32A

op1mealhp

R1 HA32A HELPS SP WITH MEALS

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.
If FACILITY flag = 1 (YES), display “a staff person from the place where {you live/[he/she] lives}.”

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/SOMEONE FROM THE PLACE SP LIVES on the PERSON ROSTER.

Display RESTAURANT/TAKE OUT SERVICES and MEALS ON WHEELS on the person roster.

If HA30 = 2 (always with someone else), display “when {you/SP} made hot meals, who did that with {you/[him/her]}”.

If HA30 = 3 (someone else always did), display “who made hot meals for {you/SP}”.

If HA30 = 4 (varied), display “who made hot meals with {you/SP} or for {you/[him/her]}”.

Display "first" and "last" in underlined text.

QUESTION TEXT:

In the last month, {when {you/SP} made hot meals, who did that with {you/[him/her]} / who made hot meals for {you/SP} / who made hot meals with {you/SP} or for {you/[him/her]}?}

IF NEEDED: This includes family, friends, {a staff person from the place where {you live/[he/she] lives},} or someone paid to help {you/[him/her]}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA32b. [What is (his/her) first name?] CONFIRM SPELLING
HA32c. [What is (his/her) last name?] CONFIRM SPELLING
HA32d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

Code All That Apply
2 SPOUSE/PARTNER
3 DAUGHTER
4 SON
5 DAUGHTER-IN-LAW
6 SON-IN-LAW
7 STEPDaughter
8 STEPSON
9 SISTER
10 BROTHER
11 SISTER-IN-LAW
12 BROTHER-IN-LAW
13 MOTHER
14 STEPMOTHER
15 MOTHER-IN-LAW
16 FATHER
17 STEPFATHER
18 FATHER-IN-LAW
19 GRANDdaughter
20 GRANDSON
21 NIECE
22 NEPHEW
23 AUNT
24 UNCLE


<table>
<thead>
<tr>
<th>25</th>
<th>COUSIN</th>
</tr>
</thead>
<tbody>
<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>SERVICE/SOMEONE FROM THE PLACE SP LIVES</td>
</tr>
<tr>
<td>91</td>
<td>OTHER RELATIVE</td>
</tr>
<tr>
<td>92</td>
<td>OTHER NONRELATIVE</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

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

For each roster selection/addition at HA32, set HELPEDWITHMEALS flag = 1 (yes).

---

**BOX HA33**

**BOXHA33**

**NOT IN FILE**

If HA30 = 2 (always with someone else) and HELPEDWITHMEALS flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA35.

If HA30 = 3 (someone else always did) and HELPEDWITHMEALS flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA36.

If HA30 = 4 (varied) and HELPEDWITHMEALS flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA34.

Otherwise go to HA33.

---

**HA33**

**ha1dmealreas**

**R1 D MEALS REASN WITH BY OTHERS**

**DISPLAY INSTRUCTIONS:**

If HA30 = 2 (always with someone else), display “with”.
If HA30 = 3 (someone else always did), display “for”.
If HA30 = 4 (varied), display “with or for”.
If HA30 = 5 (none made in last month), do not display first sentence.

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.
Display responses in two side-by-side columns.

**QUESTION TEXT:**

{What is the reason someone else made hot meals {with/for/with or for} {you/SP}?} Was that because of {your/SP’s} health or functioning or some other reason?

SELECT ALL THAT APPLY

**CODES**

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

BOX HA34

PROGRAMMER INSTRUCTIONS:

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

BOX HA34

BOXHA34 NOT IN FILE

If HA30a = 1 (yes by self), go to HA34.
If HA30 = 2 (always with someone else) or HA30a = 1 (didn’t do by self), go to HA35.
If [HA30 = 3 (someone else always did) or HA30 = 5 (not done in last month)] and
HEALTHREASONHELPWITHMEALS flag = 1 (yes), go to BOX HA36.
Otherwise, go to HA40PRE.

HA34 ha1mealdif R1 HA34 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 making hot meals by {yourself/himself/herself}?
Would you say none, a little, some, or a lot?

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

HA35 ha1mealoft R1 HA35 HOW OFTEN MAKE HOT MEALS

DISPLAY INSTRUCTIONS:
Display “a year ago” in bold underlined text.

QUESTION TEXT:
Compared to a year ago, {do you/does SP} make hot meals more often, less often, or about the same?

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

BOX HA36
BOXHA36
NOT IN FILE

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

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

Otherwise go to HA40PRE.

HA36
ha1mealwout
R1 HA36 EVER GO WITHOUT HOT MEAL

DISPLAY INSTRUCTIONS:
If HA30 = 1 (always by self) or 5 (not done in last month) or HA30a = 1 (yes by self), display “it was too difficult to make one by {yourself/himself/herself}”.

If HA30 = 2 (always with someone else) or 3 (someone else always did), display “no one was there to help or make one for {you/[him/her]?”

Display “in the last month” in underlined text.

QUESTION TEXT:
In the last month, did {you/SP} ever go without a hot meal because {it was too difficult to make one by {yourself/himself/herself} / no one was there to help or make one for {you/him/her}?

CODES
1 YES
2 NO
REFUSED
DON’T KNOW

HA40PRE
ha40PRE
NOT IN FILE

QUESTION TEXT:
Now I have a few questions about everyday money matters like handling bills and banking.

IF NEEDED: By handling bills, we mean writing checks, sending money orders or paying with cash. By banking we mean checking balances, and making transfers, deposits or withdrawals from the bank or ATM.

PRESS 1 AND ENTER TO CONTINUE

HA40
ha1bank
R1 HA40 HOW BILLS 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**

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)
   - BOX HA43
5. NOT DONE IN LAST MONTH
   - BOX HA44
6. REFUSED
   - BOX HA44
7. DON’T KNOW
   - BOX HA44

---

**HA40A**

ha1bankslf

**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/his/herself}?

**CODES**

1. YES
2. NO
3. REFUSED
   - BOX HA40A
4. DON’T KNOW
   - BOX HA40A

---

**HA42A**

op1bankhlp

**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/OTHER FROM THE PLACE SP LIVES on the PERSON ROSTER.

If HA40 = 2 (always with someone else), display “when {you/SP} handled bills and banking, who did that with
{you/[him/her]}“.

If HA40 = 3 (someone else always did), display “who handled bills and banking for {you/SP}”.

If HA40 = 4 (varied), display “who handled bills and banking with {you/SP} or for {you/[him/her]}”.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

In the last month, {when {you/SP} handled bills and banking, who did that with {you/[him/her]}? who handled bills and banking for {you/SP} /who handled bills and banking with {you/SP} or for {you/[him/her]}?}

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/[he/she] lives},} or someone paid to help {you/[him/her]}.

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

<table>
<thead>
<tr>
<th>CODES</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>SPOUSE/PARTNER</td>
</tr>
<tr>
<td>3</td>
<td>DAUGHTER</td>
</tr>
<tr>
<td>4</td>
<td>SON</td>
</tr>
<tr>
<td>5</td>
<td>DAUGHTER-IN-LAW</td>
</tr>
<tr>
<td>6</td>
<td>SON-IN-LAW</td>
</tr>
<tr>
<td>7</td>
<td>STEPDAUGHTER</td>
</tr>
<tr>
<td>8</td>
<td>STEPSON</td>
</tr>
<tr>
<td>9</td>
<td>SISTER</td>
</tr>
<tr>
<td>10</td>
<td>BROTHER</td>
</tr>
<tr>
<td>11</td>
<td>SISTER-IN-LAW</td>
</tr>
<tr>
<td>12</td>
<td>BROTHER-IN-LAW</td>
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<td>13</td>
<td>MOTHER</td>
</tr>
<tr>
<td>14</td>
<td>STEPMOTHER</td>
</tr>
<tr>
<td>15</td>
<td>MOTHER-IN-LAW</td>
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<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>
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<td>20</td>
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<td>21</td>
<td>NIECE</td>
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<tr>
<td>22</td>
<td>NEPHEW</td>
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<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>
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<td>28</td>
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</tr>
<tr>
<td>30</td>
<td>BOARDER/RENTER</td>
</tr>
</tbody>
</table>

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
31       PAID AIDE/HOUSEKEEPER/EMPLOYEE
32       ROOMMATE
33       EX-WIFE/EX-HUSBAND
34       BOYFRIEND/GIRLFRIEND
35       NEIGHBOR
36       FRIEND
37       SERVICE/SOMEONE FROM THE PLACE SP LIVES
91       OTHER RELATIVE
92       OTHER NONRELATIVE

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

BOX HA43

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

DISPLAY INSTRUCTIONS:
If HA40 = 2 (always with someone else), display “with”.
If HA40 = 3 (someone else always did), display “for”.
If HA40 = 4 (varied), display “with or for”.
If HA40 = 5 (not done in last month) do not display first sentence.

Display “HEALTH OR FUNCTIONING” and “OTHER REASON” in underlined text.
Display responses in two side-by-side columns.

QUESTION TEXT:
{What is the reason someone else handled bills and banking {with/for/with or for} {you/him/her}? Was that because of {your/his/her} health or functioning or some other reason?
SELECT ALL THAT APPLY

CODES

1       HEALTH OR FUNCTIONING (INCLUDES AGE, MEMORY, VISION, HEALTH CONDITION/DISEASE NAMES, SURGERY, UNABLE TO DRIVE)

2       OTHER REASON (INCLUDES SHARED ACTIVITY, ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED TO DO IT, PAY SOMEONE, DOESN’T LIKE TO DO IT)
If HA43 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHBANKING flag = 1 (yes).

If HA40a = 1 (yes by self), go to HA44.
If HA40 = 2 (always with someone else) or HA40a = 1 (didn’t do by self), go to HA45.
If [HA40 = 3 (someone else always did) or HA40 = 5 (not done in last month)] and HEALTHREASONHELPWITHBANKING flag = 1 (yes), go to BOX HA46.
Otherwise, go to HA50PRE.

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

Display "a year ago" in bold underlined 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 HELPEDWITHBANKING 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 bold underlined text.

QUESTION TEXT:

In the last year, did [you/SP] have money matters like these that needed to be handled?

IF NEEDED: Money matters include opening, closing or cashing in CDs, checking, money market or retirement accounts, or applying for loans.
CODES

<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></td>
<td>SECTION SC</td>
</tr>
</tbody>
</table>

**HA51**

**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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>1</td>
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<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></td>
<td>SECTION SC</td>
</tr>
</tbody>
</table>

**HA52A**

**DISPLAY INSTRUCTIONS:**

Display HELPER RELATIONSHIP CODES.

Display PERSON ROSTER with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

If FACILITY flag = 1 (YES) or RETIREMENTCOMMUNITY flag = 1 (YES), display SERVICE/ SOMEONE FROM THE PLACE SP LIVES on the person roster.

Display "first" and "last" in underlined text.

**QUESTION TEXT:**

Who was that?

IF NEEDED: This includes family, friends, { a staff person from the place where {you live/(he/she) lives},} or someone paid to help {you/(him/her)}.

PROBE: Anyone else?
SELECT ALL THAT APPLY

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

HA52b. [What is (his/her) first name?] CONFIRM SPELLING
HA52c. [What is (his/her) last name?] CONFIRM SPELLING
HA52d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

<table>
<thead>
<tr>
<th>CODES</th>
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<tbody>
<tr>
<td>2</td>
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<tr>
<td>4</td>
<td>SON</td>
</tr>
<tr>
<td>5</td>
<td>DAUGHTER-IN-LAW</td>
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<td>6</td>
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<td>STEPDaugHER</td>
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<td>8</td>
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<td>SISTER</td>
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<td>STEPDaugHER'S SON/DAUGHTER</td>
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PROGRAMMER INSTRUCTIONS:
Do not display the following response codes: 1, 2, 3, 4, 7, 8, and 37.
For each roster selection/addition at HA52, set HELPEDWITHMONEYMATTERS flag=1 (yes).

Go to Section SC- Self-care Activities
<table>
<thead>
<tr>
<th>Derived Variables from Items in the HA Section</th>
</tr>
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<tbody>
<tr>
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<td>ha1dmealssa</td>
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<tr>
<td>ha1dshopreasons</td>
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