# National Study of Caregiving

## SECTION: CARE ACTIVITIES

### CA1PRE

**DISPLAY INSTRUCTIONS:**
Display date as “Month, day, year” with month spelled out.

**QUESTION TEXT:**
First we have a few questions about ways you may have helped {SP} in the last month, that is since {CURRENT DATE MINUS 1 MONTH}, because of [his/her] health and functioning.

PRESS 1 AND ENTER TO CONTINUE

### CA1

**QUESTION TEXT:**
Let’s start with chores you may do around {SP}’s home. This includes laundry, cleaning, or making hot meals.

In the last month, how often did you help {SP} with laundry, cleaning, or making hot meals or do these chores? Would you say every day, most days, some days, rarely, or never?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EVERY DAY</td>
</tr>
<tr>
<td>2</td>
<td>MOST DAYS</td>
</tr>
<tr>
<td>3</td>
<td>SOME DAYS</td>
</tr>
<tr>
<td>4</td>
<td>RARELY</td>
</tr>
<tr>
<td>5</td>
<td>NEVER</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
If a breakoff occurs at any time after a response is coded for CA1, the disposition for the case should be ST (Started).

### CA2

**QUESTION TEXT:**
In the last month, how often did you shop with {SP} for groceries or personal items or do [his/her] shopping for [him/her]? Would you say every day, most days, some days, rarely, or never?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EVERY DAY</td>
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<tr>
<td>2</td>
<td>MOST DAYS</td>
</tr>
<tr>
<td>3</td>
<td>SOME DAYS</td>
</tr>
<tr>
<td>4</td>
<td>RARELY</td>
</tr>
<tr>
<td>5</td>
<td>NEVER</td>
</tr>
</tbody>
</table>

### CA3

**QUESTION TEXT:**
In the last month, did you ever help {SP} order [his/her] prescribed medicines or order these for [him/her]?

**CODES**

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EVERY DAY</td>
</tr>
<tr>
<td>2</td>
<td>MOST DAYS</td>
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<tr>
<td>3</td>
<td>SOME DAYS</td>
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<tr>
<td>4</td>
<td>RARELY</td>
</tr>
<tr>
<td>5</td>
<td>NEVER</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
If a breakoff occurs at any time after a response is coded for CA3, the disposition for the case should be ST (Started).
Next, I have a few questions about hands-on assistance that you may have given {SP} in the last month.

CA4  C5 CA4 HELP W/ BILLS OR BANKING

CODES

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>SP DOES NOT TAKE ANY PRESCRIBED MEDICINES</td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

QUESTION TEXT:

In the last month, did you ever help {SP} with handling bills or banking or do this for {him/her}?

CODES

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

BOX CA5  BOX CA5  NOT ON FILE

If CA2 = 1, 2, 3, or 4 (HELPS SHOP) or CA3 = 1 (YES, ORDER MEDS) or CA4 = 1 (YES, HANDLE BILLS), go to CA5.

Otherwise, go to CA6.

CA5  C5 CA5A USE COMPUTR SHOP FR GROC

<p>| | | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:

If CA2 = 1, 2, 3, or 4 (HELPS SHOP), display CA5a.
If CA3 = 1 (YES, ORDER MEDS), display CA5b.
If CA4 = 1 (YES, HANDLE BILLS), display CA5c.

Use "Same Question Stem" display.
If at first item, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

[] In the last month, did you use a computer to... []

{variable text [a-c]}

{RESPONSE [1] a. shop for groceries or personal items for {SP}?}
{RESPONSE [2] b. order medicines for {him/her}?}
{RESPONSE [3] c. handle bills or do banking for {him/her}?}

CODES

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

CA6PRE  CA6PRE  NOT ON FILE

Next, I have a few questions about hands-on assistance that you may have given {SP} in the last month.
CA6  cca5hwoftpc  C5 CA6 HOW OFT HELP PERS CARE

QUESTION TEXT:
In the last month, how often did you help {SP} with personal care such as eating, showering or bathing, dressing or grooming, or using the toilet? Would you say every day, most days, some days, rarely, or never?

CODES
1     EVERY DAY
2     MOST DAYS
3     SOME DAYS
4     RARELY
5     NEVER
     REFUSED
     DON'T KNOW

CA7  cca5hwofathom  C5 CA7 HOW OFT HLP GTNG ARD HOME

QUESTION TEXT:
In the last month, how often did you help {SP} get around, that is, getting in and out of bed, getting around inside {his/her} home, or leaving {his/her} home to go outside? Would you say every day, most days, some days, rarely, or never?

CODES
1     EVERY DAY
2     MOST DAYS
3     SOME DAYS
4     RARELY
5     NEVER
     REFUSED
     DON'T KNOW

BOX CA8  BOX CA8  NOT ON FILE

If CA6 = 5 (NEVER HELPED WITH PERSONAL CARE), RF, or DK and CA7 = 5 (NEVER HELPED GET AROUND HOME), RF, or DK, go to CA9.

Otherwise, go to CA8.

CA8  cca5hlplft  C5 CA8A HELP LIFT FRM SEATED POS
cca5hlpptspt  C5 CA8B LEANED ON OR SUPPRT WGHT
cca5hlpsstd  C5 CA8C HOLD STEADY WHILE WALK

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at CA8a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
In the last month, when you helped {SP} with personal care, did you ever...[]
{variable text [a-c]}

RESPONSE [1] a. lift {him/her} from a seated or lying position?
RESPONSE [2] b. let {him/her} lean on you or support {his/her} weight?
RESPONSE [3] c. hold {him/her} steady while {he/she} walked or stood?

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.

If CA8a = 1, go to CA8d.
Else if CA8b = 1, go to CA8e.
Else if CA8c = 1, go to CA8f.
Otherwise go to CA9.

CA8d

CCA5HWOLIFT C5 CA8D HOW OFTEN HELPED LIFT

QUESTION TEXT:
In the last month, how often did you lift {him/her} from a seated or lying position? Would you say every day, most days, some days, or rarely?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
   REFUSED
   DON'T KNOW

PROGRAMMER INSTRUCTIONS:
If CA8b = 1, go to CA8e.
Else if CA8c = 1, go to CA8f.
Otherwise go to CA9.

CA8e

CCA5HWOTSPT C5 CA8E HOW OFT LEANED ON4 SPPRT

QUESTION TEXT:
In the last month, how often did you let {him/her} lean on you or support {his/her} weight? Would you say every day, most days, some days, or rarely?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
   REFUSED
   DON'T KNOW

PROGRAMMER INSTRUCTIONS:
If CA8c = 1, go to CA8f.
Otherwise go to CA9.
CA8f  cca5howftstd  C5 CA8F HOW OFT HELD STEADY

QUESTION TEXT:
In the last month, how often did you hold {him/her} steady while {he/she} stood or walked? [Would you say every day, most days, some days, or rarely?]

CODES
1   EVERY DAY
2   MOST DAYS
3   SOME DAYS
4   RARELY
5   REFUSED
6   DON'T KNOW

CA9  cca5howftdrv  C5 CA9 HOW OFTEN DROVE SP

QUESTION TEXT:
In the last month, how often did you drive {SP} places? Would you say every day, most days, some days, rarely, or never?

CODES
1   EVERY DAY
2   MOST DAYS
3   SOME DAYS
4   RARELY
5   NEVER
6   REFUSED
7   DON'T KNOW

CA10 cca5howftott  C5 CA10 OFTN WENT ON OTH TRANSPR

QUESTION TEXT:
In the last month, how often did you go with {SP} in a van, shuttle or cab, or take public transportation (the bus, subway, train, or light rail) with {him/her}? [Would you say every day, most days, some days, rarely, or never?]

CODES
1   EVERY DAY
2   MOST DAYS
3   SOME DAYS
4   RARELY
5   NEVER
6   REFUSED
7   DON'T KNOW

CA11PRE  CA11PRE  NOT ON FILE

The next few questions are about help related to {SP}'s health care.
PRESS 1 AND ENTER TO CONTINUE

CA11  cca5hlpmed  C5 CA11A KEEP TRACK OF MEDS
cca5hlpshot  C5 CA11B TAKE SHOTS OF INJECTNS

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September 2019
DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at CA11a do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{[} In the last month, did you ever help {SP}...{]}
{variable text [a-h]}
RESPONSE [1] a. keep track of {his/her} medications?
RESPONSE [2] b. take shots or injections?
RESPONSE [3] c. manage medical tasks like ostomy care, IVs, or testing blood?
RESPONSE [4] d. with exercises {he/she} was supposed to do?
RESPONSE [5] e. with a special diet?
RESPONSE [6] f. care for {his/her} teeth or dentures?
RESPONSE [7] g. care for {his/her} feet, like clipping nails?
RESPONSE [8] h. with skin care related to wounds or sores?

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-h sequence until all rows have been displayed.

CA12PRE
NOT ON FILE

DISPLAY INSTRUCTIONS:
Display date as "Month day, year" with month spelled out.

Now please think about the last year, that is, since {CURRENT DATE MINUS 1 YEAR}.
PRESS 1 AND ENTER TO CONTINUE

CA12
CCA5HLPMDT K C5 CA12A HELP MAKE MEDICAL APPTS
CCA5HLPEXRC S C5 CA12B HLP SPEAK TO MED PROVIDER
CCA5HLPDIE T C5 CA12C HELP ADD HEALTH INS PLAN
CCA5HLPTEETH C5 CA12D HELP W OTHER HEALTH INS

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at CA12a, do not display question text in brackets.
Otherwise, display question text in brackets.
Display “year” in bold and underlined text.

**QUESTION TEXT:**

{[In the last year, did you ever... {[}]}

{variable text [a-d]}

RESPONSE [1] a. make appointments for {SP} with a medical provider?
RESPONSE [2] b. speak to or e-mail {SP}’s medical provider about {his/her} care?
RESPONSE [3] c. help {him/her} change or add a health insurance or prescription drug plan?

IF NEEDED: For example, changed or helped {him/her} change a Medicare supplemental plan or prescription drug plan, or helped {him/her} decide to join or leave a managed care plan.

RESPONSE [4] d. handle any other health insurance matters related to {his/her} medical care?

IF NEEDED: This includes contacting Medicare or another insurer to find out what is covered, comparing plans or providers, finding out about bills, or filing a claim.

**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>REFUSED</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-d sequence until all rows have been displayed.

**BOX CA12**

**BOX CA12**

**NOT ON FILE**

If CA12B = 1 (YES), go to CA12E.
Otherwise, go to Box CA13.

**CA12E**

**cca5hlpdramt**

C5 CA12E AMT HLP SPEAK TO MED PROVIDER

**QUESTION TEXT:**

In the last year, how much did talking to {SP’s} medical providers help you with caring for {him/her}? A lot, somewhat, a little, or not at all?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>A LOT</th>
<th>SOMEWHAT</th>
<th>A LITTLE</th>
<th>NOT AT ALL</th>
<th>REFUSED</th>
<th>DON’T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A LOT</td>
<td>SOMEWHAT</td>
<td>A LITTLE</td>
<td>NOT AT ALL</td>
<td>REFUSED</td>
<td>DON’T KNOW</td>
</tr>
<tr>
<td>2</td>
<td>SOMETHING</td>
<td>A LITTLE</td>
<td>NOT AT ALL</td>
<td>REFUSED</td>
<td>DON’T KNOW</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A LITTLE</td>
<td>NOT AT ALL</td>
<td>REFUSED</td>
<td>DON’T KNOW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>NOT AT ALL</td>
<td>REFUSED</td>
<td>DON’T KNOW</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**BOX CA13**

**BOX CA13**

**NOT ON FILE**

If INHOUSEHOLD flag = 1 (YES, CAREGIVER LIVES WITH SP) for CG, go to BOX CA15.

Otherwise, go to CA13.
CA13  cca5hwget2sp  C5 CA13 MODE OF TRANS TO VIST SP

QUESTION TEXT:
When you visit {SP} how do you usually get there?

CODES
1  WALK  CA14
2  DRIVE  CA14
3  SOMEONE DRIVES ME  CA14
4  TAXI  CA14
5  BUS  CA14
6  SUBWAY/TRAIN/LIGHT RAIL  CA14
7  TRAIN  CA14
8  AIRPLANE/FLY  BOX CA15
9  OTHER (SPECIFY)  CA14
1  REFUSED  CA14
9  DON'T KNOW  CA14

CA13a  CA13a  NOT ON FILE

QUESTION TEXT:
SPECIFY MODE OF TRANSPORTATION

ENTER TEXT

Length  75

CA14  cca5tm2spunt  C5 CA14 UNIT TIME GET 2 SP HOME

QUESTION TEXT:
How long does it normally take you to get to {SP}'s home from where you live?

INDICATE RESPONSE UNIT

CODES
1  MINUTES  CA14b
2  HOURS  BOX CA15
1  REFUSED  BOX CA15
9  DON'T KNOW  BOX CA15

CA14a  cca5tm2spmin  C5 CA14A MINUTES GET 2 SP HOME

QUESTION TEXT:
ENTER NUMBER OF MINUTES

ENTER NUMBER

Range  1 to 60

CA14b  cca5tm2sphrs  C5 CA14B HOURS GET 2 SP HOME

QUESTION TEXT:
ENTER NUMBER OF HOURS

ENTER NUMBER

Range  1 to 24
Soft Range  1 to 6
CA15  

**DISPLAY INSTRUCTIONS:**
Display date as “Month day, year” with month spelled out.

**QUESTION TEXT:**
You said that in the last month you didn't help {SP} with any of the activities we just talked about. Did you help {SP} with any of these activities in the last year, that is since [CURRENT DATE MINUS 1 YEAR]?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>CA17</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>NO</td>
<td>CA17</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
If CA15 = 1 (YES HELPED IN LAST YEAR), set HELPED IN PREVIOUS MONTHS flag = 1 (YES)

CA16  

**DISPLAY INSTRUCTIONS:**
Display date as “Month, day year” with month spelled out.

**QUESTION TEXT:**
What was the last month since [CURRENT DATE MINUS 1 YEAR] that you helped {SP} with any of these activities?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>JANUARY</th>
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</thead>
<tbody>
<tr>
<td>2</td>
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<td>11</td>
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<tr>
<td></td>
<td>DON'T KNOW</td>
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</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
Go to Section DC - Duration of Care

**CA17**

<table>
<thead>
<tr>
<th>QUESTION TEXT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Those are all of the questions I have for you about helping {SP}.</td>
</tr>
<tr>
<td>PRESS 1 AND ENTER TO CONTINUE</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
- Set CATI Disposition Code to IE, Ineligible - Did not help SP in last year.
- Go to Section CN - Closing
National Study of Caregiving

Section DC [DURATION OF CARE] Sequence: 2

DC1  cdc5hlpsched C5 DC1 HELP ON REGULAR SCHEDULE

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “that you helped {him/her}”.
Otherwise, use null display.

QUESTION TEXT:
Thinking about all of the ways you helped {SP} in the last month {that you helped {him/her}}, did you help on a regular basis or did it vary? By regular schedule, we mean the same days or times every week.

CODES
1 REGULAR SCHEDULE
2 VARIED DC3
REFUSED DC6
DON’T KNOW DC3

DC2  cdc5hlpdyswk C5 DC2 NUMB OF DAYS PER WK HELP

QUESTION TEXT:
How many days per week did you help {him/her}?

ENTER NUMBER OF DAYS PER WEEK

ENTER NUMBER
Range 1 to 7
REFUSED DC6
DON’T KNOW DC6

PROGRAMMER INSTRUCTIONS:
If any response other than DK or RF entered, go to DC4.

DC3  cdc5hlpdysmt C5 DC3 NUMB DAYS HELPD LAST MNTH

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “that you helped {him/her}”.
Otherwise, use null display.

QUESTION TEXT:
In the last month {that you helped {him/her}}, how many days altogether did you help {SP}?

ENTER NUMBER OF DAYS PER MONTH

ENTER NUMBER
Range 1 to 31
REFUSED DC6
DON’T KNOW DC6
DC4

**QUESTION TEXT:**

On days when you helped [him/her], about how many hours did you spend helping?

ENTER NUMBER OF HOURS PER DAY

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 24</th>
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</thead>
<tbody>
<tr>
<td>REFUSED</td>
<td>DC6</td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td>DC6</td>
</tr>
</tbody>
</table>

DC5

**DISPLAY INSTRUCTIONS:**

If DC1 = 1 (REGULAR SCHEDULE), multiply number entered at DC2 (DAYS PER WEEK) by number entered at DC4 (HOURS PER DAY) by 4 \((DC2 \times DC4) \times 4\) and display calculated number of hours.

Else if DC1 = 2 (VARIED), RF, or DK, multiply number entered at DC3 (DAYS LAST MONTH) by number entered at DC4 (HOURS ON DAYS HELPED) and display calculated number of hours.

IF HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "in the last month that you helped [him/her]". Otherwise, display "last month".

**QUESTION TEXT:**

So that adds up to about \{CALCULATED NUMBER OF HOURS\} hours \{last month/in the last month that you helped [him/her]\}. Does that sound about right?

**CODES**

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

DC6

**DISPLAY INSTRUCTIONS:**

If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display “in the last month that you helped [him/her]”. Otherwise, display “last month”.

**QUESTION TEXT:**

About how many hours altogether \{last month/in the last month that you helped [him/her]\} would you said you helped?

ENTER NUMBER OF HOURS

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
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</thead>
<tbody>
<tr>
<td>REFUSED</td>
<td>DC7</td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td>DC7</td>
</tr>
</tbody>
</table>

**BOX DC7**

BOX DC7

NOT ON FILE

If CA6= 5 (NEVER HELPED WITH PERSONAL CARE), RF, or DK and CA7 = 5 (NEVER HELPED GET AROUND), RF, or DK, go to DC9.

Otherwise, go to DC7.
DC7

DISPLAY INSTRUCTIONS:
If DC6 > 0, display hours from DC6.
Else if DC1 = 1 (REGULAR SCHEDULE) and DC2 > 0 and DC4 > 0, multiply number entered at DC2 (DAYS PER WEEK) by number entered at DC4 by 4 and display calculated number of hours.
Else if DC1 = 2 (VARIED), RF, or DK, and DC3 >0 and DC4 >0, multiply number entered at DC3 (DAYS LAST MONTH) by number entered at DC4 (HOURS ON DAYS HELPED) and display calculated number of hours.
Else if DC6 = DK or RF, use null display.
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "In the last month that you helped {him/her}". Otherwise, display "last month".
If CA6 = 1, 2, 3, or 4, display "personal care"
If CA7 = 1, 2, 3, or 4, display "helping {SP} get around"
If both "personal care" and "helping {SP} get around" are displayed, also display "and".

QUESTION TEXT:
Of the [CALCULATED NUMBER OF HOURS/HOURS FROM DC6] hours you helped {SP} [last month/in the last month that you helped {him/her}], about how many were spent helping just with {personal care} {and} {helping {him/her} get around}?

ENTER NUMBER
Range 0 to 744
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Number of hours entered cannot exceed total number of hours helped in last month. If it does, display error message "NUMBER OF HOURS HELPED WITH THESE ACTIVITIES CANNOT EXCEED TOTAL NUMBER OF HOURS HELPED IN MONTH. VERIFY WITH RESPONDENT AND RE-ENTER ANSWER."
If number entered at DC7, go to DC9.

DC8

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "in the last month that you helped {him/her}". Otherwise, display "last month."
If CA6 = 1, 2, 3, or 4, display "personal care"
If CA7 = 1, 2, 3, or 4, display "helping {SP} get around"
If both "personal care" and "helping {SP} get around" are displayed, also display "and".

QUESTION TEXT:
If you had to guess, would you say less than half, about half, more than half, or nearly all of the hours you helped {SP} [last month/in the last month that you helped {him/her}] were for {personal care} {and} {helping {him/her} get around}?

CODES
1 LESS THAN HALF
2 ABOUT HALF
3 MORE THAN HALF
4 NEARLY ALL
DC9

"cdc5hpyrpl" C5 DC9 HELPED LONGER THAN A YEAR

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "Thinking back from the last month you helped {SP}, had you".
Otherwise, display "Have you".

QUESTION TEXT:
{Thinking back from the last month you helped {SP}, had you/Have you} been helping {SP} for a year or longer?

CODES
1 YES
2 NO
3 REFUSED
4 DON'T KNOW

BOX DC10

"box dc10" NOT ON FILE

If HELPED IN PREVIOUS MONTHS flag = 1 (YES), and DC9 = 1 (YES), go to DC11.
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), and DC9 = 2 (NO), RF, or DK, go to Section AC.
Else if DC9 = 1 (YES), go to DC11.
Else if DC9 = 2 (NO), DK or RF, go to DC10.

DC10

"cdc5hpmthst" C5 DC10 MONTH STARTED HELPING

QUESTION TEXT:
What month did you start helping {SP}?

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

PROGRAMMER INSTRUCTIONS:
Go to Section AC – Aspects of Caregiving.

DC11

"cdc5hpunit" C5 DC11 UNIT YEARS HELPING SP

DISPLAY INSTRUCTIONS:
If HELPED IN PREVIOUS MONTHS flag = 1 (YES), display "Thinking back from the last month you helped {SP}, how" and "had".
Otherwise, display, "How" and "have".
{Thinking back from the last month you helped {SP}, how/How} many years {had/have} you been helping {SP}?

INDICATE RESPONSE UNIT

CODES

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<tr>
<th></th>
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<th>NUMBER YEARS</th>
</tr>
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<tr>
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</tr>
<tr>
<td>2</td>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

DC11b

C5 DC11A NUMBER OF YEARS HELPING

QUESTION TEXT:

ENTER NUMBER OF YEARS

ENTER NUMBER

Range: 0 to 90
Soft Range: 1 to 40

PROGRAMMER INSTRUCTIONS:

Go to Section AC.

DC11a

CDC5HLPYRS

C5 DC11A NUMBER OF YEARS HELPING

QUESTION TEXT:

ENTER NUMBER OF YEARS

ENTER NUMBER

DC11b

CDC5HLPYRST

C5 DC11B YEAR STARTED HELPING

QUESTION TEXT:

ENTER YEAR

ENTER NUMBER

Range: 1920 to 2012

PROGRAMMER INSTRUCTIONS:

Edit check: Year entered must be between (CURRENT YEAR - 90) and (CURRENT YEAR - 1). If year entered is outside of edit check, display error message "RESPONSE NOT LIKELY. VERIFY WITH RESPONDENT AND REENTER."

If DC11b = CURRENT YEAR, display error message "LAST YEAR HELPED MUST BE PRIOR TO CURRENT YEAR."

Go to Section AC-Aspects of Caregiving.

DC12

CDC5HLPYRS5P

C5 DC12 HELP LONGER THAN FIVE YRS

QUESTION TEXT:

Was it 5 years or longer?

CODES

<p>| | | | |</p>
<table>
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<tr>
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<td></td>
<td></td>
<td>REFUSED</td>
<td>Section AC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DON'T KNOW</td>
<td>Section AC</td>
</tr>
</tbody>
</table>
Now we have a few questions about your relationship with {SP}.

PRESS 1 AND ENTER TO CONTINUE

**AC1**

**cac5joylevel**

**C5 AC1 ENJOY BEING WITH SP**

**QUESTION TEXT:**

How much do you enjoy being with {SP}? Would you say a lot, some, a little, or not at all?

**CODES**

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON'T KNOW

**AC2**

**cac5arguelv**

**C5 AC2 LEVEL SP ARGUES WITH YOU**

**QUESTION TEXT:**

How much does {SP} argue with you? Would you say a lot, some, a little, or not at all?

**CODES**

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON'T KNOW

**AC3**

**cac5spapprlv**

**C5 AC3 LEVEL SP APPRECIATES YOU**

**QUESTION TEXT:**

How much does {SP} appreciate what you do for {him/her}?

[Would you say a lot, some, a little, or not at all?]

**CODES**

1. A LOT
2. SOME
3. A LITTLE
4. NOT AT ALL
5. REFUSED
6. DON'T KNOW
AC4  cac5nerveslv  C5 AC4 LEVEL SP ON YOUR NERVES

QUESTION TEXT:

How often does {he/she} get on your nerves?

[Would you say a lot, some, a little, or not at all?]

CODES
1  A LOT
2  SOME
3  A LITTLE
4  NOT AT ALL
   REFUSED
   DON'T KNOW

AC5  cac5moreconf  C5 AC5A HLP SP U MORE CNF ABLTY
   cac5dealbetr  C5 AC5B HLP SP U DEAL W DIFF SIT
   cac5closr2sp  C5 AC5C HLP SP U R CLOSER TO SP
   cac5moresat  C5 AC5D HLP SP U STSFY SP CAREd4

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.

If at AC5a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[ ]} Next we have a few questions about your experience helping {SP}. For each statement I read, please tell me whether this describes your situation very much, somewhat, or not so much. {[ ]}

{variable text [a-d]}

RESPONSE [1]  a. Helping {SP} has made you more confident about your abilities.
RESPONSE [2]  b. Helping {him/her} has taught you to deal with difficult situations.
RESPONSE [3]  c. Helping {SP} has brought you closer to {him/her}.
RESPONSE [4]  d. Helping {SP} gives you satisfaction that {he/she} is well cared for.

CODES
1  VERY MUCH
2  SOMEWHAT
3  NOT SO MUCH
   REFUSED
   DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Array the responses and variable text columns in the panel.

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

AC6  cac5diffinc  C5 AC6A FINANCIAL DIFF HELPING
   cac5diffemo  C5 AC6B EMOTIONAL DIFF HELPING
   cac5diffphy  C5 AC6C PHYSICAL DIFF HELPING

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.

If at AC6a, do not display question text in brackets.
Otherwise, display question text in brackets.
If preloaded relationship of SP to Caregiver is 2 (spouse/partner), display "Helping a spouse or partner who has health problems can be difficult."

If preloaded caregiver is related to SP (relationship codes 3-29), display "Helping older relatives can be difficult."

Otherwise, use null display.

**QUESTION TEXT:**

{[} {Helping a spouse or partner who has health problems can be difficult./Helping older relatives can be difficult.} Is helping {SP}…{]}

{variable text [a-c]}

RESPONSE [1] a. financially difficult for you?
RESPONSE [2] b. emotionally difficult for you?
RESPONSE [3] c. physically difficult for you?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></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 the rows have been displayed.

**BOX AC7**

<table>
<thead>
<tr>
<th>cac5diffinlv</th>
<th>C5 AC7A LEVEL FINANCIALLY DIFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>cac5diffemlv</td>
<td>C5 AC7B LEVEL EMOTIONALLY DIFF</td>
</tr>
<tr>
<td>cac5diffphlv</td>
<td>C5 AC7C LEVEL PHYSICALLY DIFF</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

If AC6a = 1 (YES, FINANCIALLY DIFFICULT), display AC7a.
If AC6b = 1 (YES, EMOTIONALLY DIFFICULT), display AC7b.
If AC6c = 1 (YES, PHYSICALLY DIFFICULT), display AC7c.

Use "Same Question Stem" display.

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

**QUESTION TEXT:**

{[} Please tell me how difficult helping is by picking a number from 1 to 5. The number 5 means very difficult and the number 1 means a little difficult.[]}

{variable text [a-c]}

{RESPONSE [1] a. How financially difficult is helping {SP}?}

CODES
1 1 A LITTLE DIFFICULT
2
3 3
4 4
5 5 VERY DIFFICULT
   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.

BOX AC8
BOX AC8
NOT ON FILE

If preloaded relationship of Caregiver to SP is 2 through 12, go to AC8.
Otherwise, go to AC9.

AC8 cac5fmydisa C5 AC8 LVL FMLY DISAGR OVER CARE

QUESTION TEXT:
In general, how much has your family disagreed over the details of (SP)’s care? Would you say very much, somewhat, or not so much?

CODES
1 VERY MUCH
2 SOMewhat
3 NOT SO MUCH
   REFUSED
   DON’T KNOW

AC8A cac5careamt C5 AC8A FAIR SHARE OF SP CARE

QUESTION TEXT:
Families sometimes share responsibility for caring for an older relative. In general, do you think you do more than your fair share, less than your fair share, or a fair amount?

CODES
1 MORE THAN FAIR SHARE
2 LESS THAN FAIR SHARE
3 FAIR AMOUNT
   REFUSED
   DON’T KNOW

AC9 cac5exhaustd C5 AC9A U ARE EXHAUSTED AT NIGHT
   cac5toomuch C5 AC9B CARE MORE THN CAN HANDLE
   cac5notime C5 AC9C U HAVE NO TIME FOR SELF
   cac5routchg C5 AC9D CARE ROUTINE THEN CHANGS
DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at AC9a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{" Please listen to a few more statements and answer whether this describes your situation very much, somewhat, or not so much. { "}

{variable text [a-d]}

RESPONSE [1] a. You are exhausted when you go to bed at night.
RESPONSE [2] b. You have more things to do than you can handle.
RESPONSE [3] c. You don't have time for yourself.
RESPONSE [4] d. As soon as you get a routine going, {SP}'s needs change.

CODES

1 VERY MUCH
2 SOMEWHAT
3 NOT SO MUCH
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

Go to Section SE - Support Environment.
The next questions are about support you may be getting.

PRESS 1 AND ENTER TO CONTINUE

Do you have friends or family that you talk to about important things in your life?

**CODES**

1. YES
2. NO
3. REFUSED
4. DON'T KNOW

Do you have friends or family that help you with your daily activities, such as running errands, or helping you with things around the house?

**CODES**

1. YES
2. NO
3. REFUSED
4. DON'T KNOW

Do you have friends or family that help you care for {SP}?

**CODES**

1. YES
2. NO
3. REFUSED
4. DON'T KNOW

In the last year, have you gone to a support group for people who give care?

**CODES**

1. YES
2. NO
3. REFUSED
4. DON'T KNOW
**SE4a**

**cse5srv2hlp**

C5 SE4A USED SERV TAKE TIME AWAY

**DISPLAY INSTRUCTIONS:**
Display the first “you” in underlined text.

**QUESTION TEXT:**
In the last year, have you used any service that took care of {SP} so that you could take some time away from helping?

**CODES**

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<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
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<td>YES</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>
</tbody>
</table>

**SE5**

**cse5training**

C5 SE5 U RCVD TRAINING 2 HELP

**QUESTION TEXT:**
In the last year, have you received any training to help you take care of {SP}?

**CODES**

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

**SE6**

**cse5fndfnhlp**

C5 SE6 U FOUND FINANCIL HLP 4 SP

**DISPLAY INSTRUCTIONS:**
Display ", also known as {STATE NAME FOR MEDICAID PROGRAM} in {SP STATE}." if state name for Medicaid in SP's STATE is not "Medicaid." Display full state name.

**QUESTION TEXT:**
In the last year, have you found financial help for {SP}, including helping {him/her} apply for Medicaid {also known as [STATE NAME FOR MEDICAID PROGRAM] in [SP STATE]}?

**CODES**

<p>| | |</p>
<table>
<thead>
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<tbody>
<tr>
<td>1</td>
<td>YES</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>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**
Use NHATS State Name for Medicaid lookup file.

**BOX SE7**

**BOX SE7**

NOT ON FILE

If SE4 or SE4a or SE5 or SE6 = 1 (YES, SUPPORT, USED SERVICE, TRAINING, FINANCIAL HELP), go to SE7.

Otherwise, go to SE8.

**SE7**

**cse5hwfnd1**

C5 SE7A INFO FROM GOVT OR COMM

**cse5hwfnd2**

C5 SE7B INFO MED PROVIDER SOC WRKR

**cse5hwfnd3**

C5 SE7C INFO FRM CHURCH SYNAGOG

**cse5hwfnd4**

C5 SE7D INFO FRM YOUR EMPLOYER

**cse5hwfnd5**

C5 SE7E FOUND INFO ON OWN

**cse5hwfnd6**

C5 SE7F INFO FROM OTHER SOURCE
DISPLAY INSTRUCTIONS:
If SE4 = 1 (YES), display "the support group".
If SE4a = 1 (YES), display "the service you used in order to take time away".
If SE5 = 1 (YES), display "the training".
If SE6 = 1 (YES), display "financial help for {SP}".
If more than one item displayed, display "and" between each one.

If only one service listed, display "this service".
If more than one service listed, display "these services".

Use "Same Question Stem" display.
If at SE7a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{} We'd like to understand a little more about how you found out about {the support group} {the service you used in order to take time away} {the training} {financial help for {SP}}. Did you find out about {this service/these services}...{} 

{variable text [a-f]}

RESPONSE [1] a. from a government or community agency?
IF NEEDED: This includes an area agency on aging, an aging and disability resource center, a senior center, a county or state social service agency, the VA, or any other federal, state, or county government agency.

RESPONSE [2] b. by talking to a medical care provider or social worker?
RESPONSE [3] c. from a church or synagogue?
RESPONSE [4] d. from your employer?
RESPONSE [5] e. on your own, for example, from a friend, online, or at the library?
RESPONSE [6] f. from any other source?

CODES
1 YES
2 NO
REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Array the responses and variable text columns in the panel.
Display ‘variable text’ in the a-f sequence until all rows have been displayed.

If SE7f = 1, go to SE7g.
Otherwise, go to BOX SE8.
If SE4 = 1 (YES) and SE4a = (YES) and SE5 = 1 (YES) and SE6 = 1 (YES), go to SE10.

Otherwise, go to SE8.

**SE8**  
**cse5look4hlp**  
C5 SE8 EVER LOOKED FOR HELP

**DISPLAY INSTRUCTIONS:**

- If SE4 = 2 (NO), DK or RF, display "a support group for people who provide care".
- If SE4a = 2 (NO), DK, or RF, display "a service to care for {SP} so you could take time away".
- If SE5 = 2 (NO), DK, or RF, display "training to help you care for {SP}".
- If SE6 = 2 (NO), DK, or RF, display "information about how to get financial help for {SP}".
- If more than one item displayed, display "or" between each one.

**QUESTION TEXT:**

Have you ever looked for {a support group for people who provide care} {a service to care for {SP} so you could take time away} {training to help you care for {SP}} {information about how to get financial help for {SP}}?

**CODES**

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<tr>
<th>Code</th>
<th>Description</th>
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<tbody>
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<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

**SE9**  
**cse5look1**  
C5 SE9A LOOKD FOR INFO GOVT AGCY  
**cse5look2**  
C5 SE9B LOOKD FOR INFO MED PROV  
**cse5look3**  
C5 SE9C LOOKD FOR INFO RELIGIOUS  
**cse5look4**  
C5 SE9D LOOKD FOR INFO EMPLOYER  
**cse5look5**  
C5 SE9E LOOKD FOR INFO ON OWN  
**cse5look6**  
C5 SE9F LOOKD FOR INFO OTHER

**DISPLAY INSTRUCTIONS:**

- Use "Same Question Stem" display.
- If at SE9a, do not display question text in brackets.
- Otherwise, display question text in brackets.

**QUESTION TEXT:**

{variable text [a-f]}

RESPONSE 1. a. by contacting a government or community agency?  
IF NEEDED: This includes an area agency on aging, an aging and disability resource center, a senior center, a county or state social service agency, the VA, or any other federal, state, or county government agency.  
RESPONSE 2. b. by talking to a medical care provider or social worker?  
RESPONSE 3. c. by asking a church or synagogue?  
RESPONSE 4. d. by asking your employer?  
RESPONSE 5. e. on your own, for example, by asking a friend, looking online, or at the library?  
RESPONSE 6. f. from any other source?

**CODES**

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<thead>
<tr>
<th>Code</th>
<th>Description</th>
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PROGRAMMER INSTRUCTIONS:
Array the responses and variable text column in the panel.
Display 'variable text' in the a-f sequence until all rows have been displayed.
If SE9f = 1, go to SE9g.
Otherwise, go to SE10

<table>
<thead>
<tr>
<th>SE9g</th>
<th>SE9g</th>
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</table>

QUESTION TEXT:
SPECIFY THE OTHER SOURCE WHERE INFORMATION WAS LOOKED FOR

ENTER TEXT

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<table>
<thead>
<tr>
<th>SE10</th>
<th>cse5hlptgdev</th>
<th>C5 SE10 HLPD GET MOBILITY DEVICES</th>
</tr>
</thead>
</table>

QUESTION TEXT:
In the last year, have you helped {SP} to get devices to get around more easily, such as a cane, walker, wheelchair, or scooter?

CODES

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

<table>
<thead>
<tr>
<th>SE11</th>
<th>cse5homsafer</th>
<th>C5 SE11 MADE SP HOME SAFER</th>
</tr>
</thead>
</table>

DISPLAY INSTRUCTIONS:
If preloaded INHOUSEHOLD flag = 1 (lives with SP) display "made your home safer for {SP}".
Otherwise, display "helped {SP} make {his/her} home safer".

QUESTION TEXT:
In the last year, have you {made your home safer for {SP}/helped {SP} make {his/her} home safer} by adding features such as a railing or a ramp, grab bars in the bathroom, a seat for the shower or tub, or an emergency call system?

CODES

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

<table>
<thead>
<tr>
<th>SE12</th>
<th>cse5lppdhlp</th>
<th>C5 SE12 HELPED FIND PAID HELPER</th>
</tr>
</thead>
</table>

QUESTION TEXT:
In the last year, have you helped {SP} find a paid helper to do household chores or personal care?

CODES

| 1 | YES | Section PP |
| 2 | NO  | Section PP |
|   | REFUSED | Section PP |
|   | DON'T KNOW | Section PP |
Now let's talk about other activities you may have done in the last month.

PRESS 1 AND ENTER TO CONTINUE

In the last month, did you ever visit in person with friends or family not living with you, either at your home or theirs?

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

In the last month, did helping {SP} ever keep you from doing this (visiting in person with friends or family not living with you)?

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

How important is it to you to visit in person with friends or family not living with you? Would you say very important, somewhat important, or not so important?

<table>
<thead>
<tr>
<th>CODES</th>
<th>VERY IMPORTANT</th>
<th>SOMEWHAT IMPORTANT</th>
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</tbody>
</table>
PP4 | **cpp5gorelgs** | C5 PP4 ATTEND RELIGIOUS SERVICES
---|---|---
**DISPLAY INSTRUCTIONS:**
Display PP4, PP5 and PP6 on the same screen.

**QUESTION TEXT:**
In the last month, did you ever attend religious services?

**CODES**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

PP5 | **cpp5hlpkptrl** | C5 PP5 KEPT FRM RELIG SERV
---|---|---
**QUESTION TEXT:**
In the last month, did helping {SP} ever keep you from doing this (attending religious services)?

**CODES**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW

PP6 | **cpp5imprel** | C5 PP6 IMPORTNCE OF RELIG SERV
---|---|---
**QUESTION TEXT:**
How important is it to you to attend religious services? Would you say very important, somewhat important, or not so important?

**CODES**
1. VERY IMPORTANT
2. SOMewhat IMPORTANT
3. NOT SO IMPORTANT
4. REFUSED
5. DON'T KNOW

PP7 | **cpp5prtgrouP** | C5 PP7 PARTICIPATE GROUP ACTIV
---|---|---
**DISPLAY INSTRUCTIONS:**
Display PP7, PP8, and PP9 on the same screen.
If PP4 = 1 (YES), display "besides religious services,"

**QUESTION TEXT:**
In the last month, {besides religious services,} did you ever participate in club meetings or group activities?  
IF NEEDED: These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting or regular exercise groups.

**CODES**
1. YES
2. NO
3. REFUSED
4. DON'T KNOW
PP8  
**cpp5hlkpctr**  
C5 PP8 KEPT FRM GROUP ACTIV

**DISPLAY INSTRUCTIONS:**

If PA4 = 1 (YES), display "other than religious services".

**QUESTION TEXT:**

In the last month, did helping {SP} ever keep you from doing this (participating in club meetings or group activities {other than religious services})?

IF NEEDED: These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting, or regular exercise groups.

**CODES**

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

PP9  
**cpp5impgroup**  
C5 PP9 IMPORTNCE OF GROUP ACTIV

**DISPLAY INSTRUCTIONS:**

If PA4 = 1 (YES), display "other than religious services".

**QUESTION TEXT:**

How important is it to you to participate in club meetings or group activities {other than religious services}? Would you say very important, somewhat important, or not so important?

IF NEEDED: These could be any ongoing group activity including dinner or bridge clubs, neighborhood or political organizations, knitting or regular exercise groups.

**CODES**

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<tr>
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<tr>
<td>3</td>
<td>NOT SO IMPORTANT</td>
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</tbody>
</table>

PP10  
**cpp5go4fun**  
C5 PP10 GO OUT FOR ENJOYMENT

**DISPLAY INSTRUCTIONS:**

Display PP10, PP11, and PP12 on the same screen.  
If PP7 = 1 (YES), display "besides for club or group activities,"

**QUESTION TEXT:**

In the last month, {besides for club or group activities,} did you ever go out for enjoyment? This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
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<th>DON'T KNOW</th>
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<td>REFUSED</td>
<td>DON'T KNOW</td>
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</tbody>
</table>

PP11  
**cpp5hlkpptgo**  
C5 PP11 KEPT FRM GOING OUT

**QUESTION TEXT:**
In the last month, did helping {SP} ever keep you from doing this (going out for enjoyment)?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES
1 YES
2 NO
REFUSED
DON'T KNOW

PP12  cpp5mpgo  C5 PP12 IMPRTNCCE OF GOING OUT

QUESTION TEXT:

How important is it to you to go out for enjoyment? Would you say very important, somewhat important, or not so important?

IF NEEDED: This includes things like going out to dinner, a movie, to gamble, or to hear music or see a play.

CODES
1 VERY IMPORTANT
2 SOMEWHAT IMPORTANT
3 NOT SO IMPORTANT
REFUSED
DON'T KNOW

PP13  cpp5wrk4pay  C5 PP13 WORK FR PAY IN LAST MNTH

DISPLAY INSTRUCTIONS:

Display PP13 and PP14 on the same screen.

QUESTION TEXT:

In the last month, did you ever work for pay or at a business you own?

CODES
1 YES
2 NO
REFUSED
DON'T KNOW

PP14  cpp5hlpktwk  C5 PP14 KEPT FRM WORKING

QUESTION TEXT:

In the last month, did helping {SP} ever keep you from doing this (working for pay)?

CODES
1 YES
2 NO
REFUSED
DON'T KNOW

PP15  cpp5volun  C5 PP15 VOLUNTEER IN LAST MNTH

DISPLAY INSTRUCTIONS:

Display PP15 and PP16 on the same screen.

QUESTION TEXT:

In the last month, did you ever do volunteer work?
<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
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<tbody>
<tr>
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<td>PP17</td>
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</table>

**PP16**

**cpp5hlkpptvo**  C5 PP16 KEPT FRM VOLUNTEER

**QUESTION TEXT:**

In the last month, did helping {SP} ever keep you from doing this (volunteer work)?

<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
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**PP17**

**cpp5careothr**  C5 PP17 PROVIDE CARE ANYONE ELSE

**DISPLAY INSTRUCTIONS:**

Display PP17 and PP18 on the same screen.

- If PP13 = 1 (YES, WORKED FOR PAY) or PP15 = 1 (YES, VOLUNTEER WORK), display "besides as [a job/volunteer work/a job or volunteer work]".
- If PP13 = 1 (YES, WORKED FOR PAY) and PP15 = 2 (NO), RF or DK, display "a job".
- If PP15 = 1 (YES, VOLUNTEER WORK) and PP13 = 2 (NO), RF, or DK, display "volunteer work".
- If PP13 = 1 (YES, WORKED FOR PAY) and PP15 = 1 (YES, VOLUNTEER WORK), display "a job or volunteer work".

**QUESTION TEXT:**

In the last month, besides as [a job/volunteer work/a job or volunteer work], did you ever provide care to or look after a child or adult who cannot care for themselves? We mean someone besides {SP}.

<table>
<thead>
<tr>
<th>CODES</th>
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<th>DON'T KNOW</th>
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</table>

**PP18**

**cpp5hlkpptca**  C5 PP18 KEPT FRM PROVIDING CARE

**QUESTION TEXT:**

In the last month, did helping {SP} ever keep you from doing this (caring for a child or other adult)?

<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
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</thead>
<tbody>
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</table>
HE1

**CHE5HEALTH**

C5 HE1 GENERAL HEALTH

**QUESTION TEXT:**

Would you say that in general, your health is excellent, very good, good, fair, or poor?

**CODES**

1. EXCELLENT
2. VERY GOOD
3. GOOD
4. FAIR
5. POOR
   - REFUSED
   - DON’T KNOW

HE2

**CHE5HRTATTACK**

C5 HE2A HAD HEART ATTACK

**CHE5OTHHEART**

C5 HE2B HAD HEART DISEASE

**CHE5HIGHBLD**

C5 HE2C HAD HIGH BLOOD PRESS

**CHE5ARTHRTIS**

C5 HE2D HAD ARTHRITIS

**CHE5OSTEOPSRS**

C5 HE2E HAD OSTEOPOROSIS

**CHE5DIABETES**

C5 HE2F HAD DIABETES

**CHE5LUNGDIS**

C5 HE2G HAD LUNG DISEASE

**CHE5CANCER**

C5 HE2H HAD CANCER

**CHE5SEEING**

C5 HE2I HAD SERIOUS DIFF SEEING

**CHE5HEARING**

C5 HE2J HAD SERIOUS DIFF HEARING

**DISPLAY INSTRUCTIONS:**

Use "Same Question Stem" display.
If at HE2a, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[} I will read a list of some diseases that a doctor may have said you have. Please tell me if a doctor ever told you that you had…{]}

{variable text [a-j]}

RESPONSE [1] a. a heart attack or myocardial infarction?
RESPONE [2] b. any other heart disease including angina or congestive heart failure?
RESPONSE [3] c. high blood pressure or hypertension?
RESPONSE [4] d. arthritis?
RESPONSE [5] e. osteoporosis or thinning of the bones?
RESPONSE [6] f. diabetes?
RESPONSE [7] g. lung disease, such as emphysema, asthma, or chronic bronchitis?
RESPONSE [8] h. cancer?
RESPONSE [9] i. serious difficulty seeing?
RESPONSE [10] j. serious difficulty hearing?

**CODES**

1. YES
PROGRAMMER INSTRUCTIONS:
Array the responses and variable text columns in the panel.
Display ‘variable text’ in the a-j sequence until all rows have been displayed.

BOX HE3

If HE2h = 1 (YES, CANCER), go to HE3.
Otherwise, go to HE4PRE.

HE3

che5cncrskin C5 HE3 CANCER TYPE SKIN CANCER
che5cncrbrst C5 HE3 CANCER TYPE BREAST CANCER
che5cncrpros C5 HE3 CANCER TYPE PROSTATE CANCER
che5cncroth C5 HE3 CANCER TYPE OTHER TYPE

DISPLAY INSTRUCTIONS:
If pre-loaded CG SEX= 2 (MALE), display “prostate cancer,” and response code 3.

QUESTION TEXT:
Was that skin cancer, breast cancer, {prostate cancer,} or some other type?
SELECT ALL THAT APPLY

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SKIN CANCER</td>
<td>HE4PRE</td>
</tr>
<tr>
<td>2</td>
<td>BREAST CANCER</td>
<td>HE4PRE</td>
</tr>
<tr>
<td>3</td>
<td>{PROSTATE CANCER}</td>
<td>HE4PRE</td>
</tr>
<tr>
<td>4</td>
<td>OTHER TYPE OF CANCER (SPECIFY)</td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

HE3a

QUESTION TEXT:
SPECIFY TYPE OF CANCER
IF NEEDED: What type of cancer was that?

ENTER TEXT
Length 25
REFUSED
DON'T KNOW

HE4PRE

QUESTION TEXT:
Now I have a few questions about other health problems.
PRESS 1 AND ENTER TO CONTINUE

HE4

che5pain C5 HE4 PAIN IN LAST MONTH

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.
QUESTION TEXT:
In the last month, have you been bothered by pain?

CODES
1 YES
2 NO
3 REFUSED
4 DON'T KNOW

HE5 che5painlimt C5 HE5 PAIN OFT LIMITED
DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often has pain limited your activities? Would you say every day, most days, some days, rarely, or never?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON'T KNOW

HE6 che5breathprb C5 HE6 BREATHING PROBLEMS
DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have any breathing problems, including shortness of breath or difficulty breathing?

CODES
1 YES
2 NO
3 REFUSED
4 DON'T KNOW

HE7 che5breathlimt C5 HE7 BREATHING OFT LIMITED
DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did your breathing problems limit your activities? Would you say every day, most days, some days, rarely, or never?

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON'T KNOW
HE8 che5armstr C5 HE8 LIMITED STRENGTH IN ARMS

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have limited strength or movement in your shoulders, arms, or hands?

CODES
1 YES
2 NO
REFUSED HE10
DON’T KNOW HE10

HE9 che5armlmt C5 HE9 ARM STRENGTH OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did this problem with your shoulders, arms or hands limit your activities?

[Would you say every day, most days, some days, rarely, or never?]

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
REFUSED HE12
DON’T KNOW HE12

HE10 che5legstr C5 HE10 LIMITED STRENGTH IN LEGS

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, did you have limited strength in your hips, legs, knees, or feet?

CODES
1 YES
2 NO
REFUSED HE12
DON’T KNOW HE12

HE11 che5leglmt C5 HE11 LEG STRENGTH OFT LIMITED

DISPLAY INSTRUCTIONS:
Display “In the last month” in underlined text.

QUESTION TEXT:
In the last month, how often did this problem with your hips, legs, knees, or feet limit your activities?

[Would you say every day, most days, some days, rarely, or never?]

CODES
1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
### HE12

**che5lowenrgy**  
C5 HE12 LOW ENERGY IN LAST MONTH

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**

In the last month, did you have low energy or were you easily exhausted?

**CODES**

<table>
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<tr>
<th>Code</th>
<th>Response</th>
<th>Ref. Code</th>
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<tbody>
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</tr>
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<td>HE14</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>HE14</td>
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</table>

### HE13

**che5enrgylmt**  
C5 HE13 ENERGY OFT LIMITED

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**

In the last month, how often did your low energy or exhaustion limit your activities?

[Would you say every day, most days, some days, rarely, or never?]

**CODES**

<table>
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<tr>
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<tbody>
<tr>
<td>1</td>
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### HE14

**che5sleeptrb**  
C5 HE14 TROUBL FALLNG BACK ASLEP

**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**

In the last month, on nights when you woke up before you wanted to get up, how often did you have trouble falling back asleep?

[Would you say every night, most nights, some nights, rarely, or never?]

**CODES**

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<tr>
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</thead>
<tbody>
<tr>
<td>1</td>
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<td>2</td>
<td>MOST NIGHTS</td>
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</table>

### BOX HE15

**BOX HE15**  
NOT ON FILE

If preloaded INHOUSEHOLD flag = 1 for Caregiver, go to HE15.

Otherwise, go to HE16.
### HE15 che5sleepint C5 HE15 INTERRUPTED SLEEP
**DISPLAY INSTRUCTIONS:**
Display “In the last month” in underlined text.

**QUESTION TEXT:**
In the last month, how often did helping [SP] cause your sleep to be interrupted?

[Would you say every day, most days, some days, rarely, or never?]

**CODES**
<table>
<thead>
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<tbody>
<tr>
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<td>REFUSED</td>
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<td>DON'T KNOW</td>
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</tbody>
</table>

### HE16 che5weight C5 HE16 WEIGHT IN POUNDS
**QUESTION TEXT:**
How much do you currently weigh?

ENTER WEIGHT IN POUNDS

**ENTER NUMBER**
| Range        | 65 to 600 |
| Soft Range   | 90 to 300 |
| REFUSED      | HE18      |
| DON'T KNOW   | HE18      |

### HE17a che5heightft C5 HE17A HEIGHT IN FEET
**QUESTION TEXT:**
How tall are you?

ENTER FEET

**ENTER NUMBER**
| Range        | 3 to 7    |
| Soft Range   | 4 to 6    |
| REFUSED      | HE18      |
| DON'T KNOW   | HE18      |

### HE17b che5heightin C5 HE17B HEIGHT INCHES
**QUESTION TEXT:**
How tall are you?

ENTER INCHES

**ENTER NUMBER**
| Range        | 0 to 11   |
| REFUSED      | HE18      |
| DON'T KNOW   | HE18      |

### HE18 che5lost10lb C5 HE18 IN YR LOST 10 POUNDS
**QUESTION TEXT:**
Have you lost 10 or more pounds in the last 12 months?
HE18a che5try2lose C5 HE18A TRYING TO LOSE WEIGHT

QUESTION TEXT:

Were you trying to lose weight?

CODES

1 YES
2 NO
3 REFUSED
4 DON'T KNOW

HE19 che5moodcher C5 HE19A CG FELT CHEERFUL
che5moodpcfl C5 HE19B CG FELT CALM PEACEFUL
che5moodfull C5 HE19C CG FELT FULL OF LIFE
che5moodbord C5 HE19D CG FELT BORED
che5moodlone C5 HE19E CG FELT LONELY
che5moodupst C5 H319F CG FELT UPSET

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.
If at HE19a, do not display question text in brackets.
Otherwise, display question text in brackets.
Display “the last month” in underlined text.

QUESTION TEXT:

{[]} Thinking about the last month, how often did you feel...{[]}

{variable text [a-f]}

RESPONSE [1] a. cheerful?
RESPONSE [2] b. calm and peaceful?
RESPONSE [3] c. full of life?
RESPONSE [4] d. bored?
RESPONSE [5] e. lonely?
RESPONSE [6] f. upset?

{[]} Would you say every day, most days, some days, rarely, or never?{[]}

CODES

1 EVERY DAY
2 MOST DAYS
3 SOME DAYS
4 RARELY
5 NEVER
6 REFUSED
7 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.
Display ‘variable text’ in the a-f sequence until all rows have been displayed.
HE20

che5flltln  C5 HE20A CG FELT LITTLE INTERST
che5flltdown  C5 HE20B CG FELT DOWN DEPRESSED
che5flltnervs  C5 HE20C CG FELT NERVOUS ANXIOUS
che5flltworry  C5 HE20D CG FELT UNABLE2STP WRRY

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at HE20a, do not display question text in brackets.
Otherwise, display question text in brackets.
Display "the last month" in underlined text.

QUESTION TEXT:

{} Over the last month, how often have you... {}
{variable text [a-d]}
RESPONSE [1] a. had little interest or pleasure in doing things?
RESPONSE [2] b. felt down, depressed, or hopeless?
RESPONSE [3] c. felt nervous, anxious, or on edge?
RESPONSE [4] d. been unable to stop or control worrying?

{} Would you say not at all, several days, more than half the days, or nearly every day?

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

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

HE21

che5lifemng  C5 HE21A LIFE HAS MEANING PURPOSE
che5feelconf  C5 HE21B CG FEELS CONFIDENT
che5gaveup  C5 HE21C CG GAVEUP IMPROVNG LIFE
che5lifegood  C5 HE21D CG LIKES LIVING SITUATN
che5lifelone  C5 HE21E CG FEELS LONELY
che5easychng  C5 HE21F CG ADJUSTS CHANG EASILY
che5rcvrqick  C5 HE21G CG RECOVERS QUICKLY

DISPLAY INSTRUCTIONS:
Use "Same Question Stem" display.
If at HE21a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{} Now I'm going to read a few statements.

Think about yourself, and after each statement, please tell me whether you agree strongly, agree somewhat, disagree somewhat, or disagree strongly. {}
{variable text [a-g]}
RESPONSE [5] e. I often feel lonely because I have few close friends.
RESPONSE [6] f. I have an easy time adjusting to changes.
RESPONSE [7] g. I get over (recover from) illness and hardship quickly.

CODES
1 AGREE STRONGLY Section HD
2 AGREE SOMEWHAT Section HD
3 DISAGREE SOMEWHAT Section HD
4 DISAGREE STRONGLY Section HD
    REFUSED Section HD
    DON’T KNOW Section HD

PROGRAMMER INSTRUCTIONS:
Array the responses and variable text columns in the panel.
Display 'variable text' in the a-g sequence until all rows have been displayed.
## National Study of Caregiving

**Section** | **HD** | **[HOUSEHOLD COMPOSITION AND DEMOGRAPHICS]**  
--- | --- | ---  

### BOX HD1

If preloaded CG RELATIONSHIP to SP = 2 (SPOUSE/PARTNER), go to section EC - Employment and Caregiving. Otherwise, go to HD1.

### HD1

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>HD3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MARRIED</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>LIVING WITH A PARTNER</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SEPARATED</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DIVORCED</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>WIDOWED</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>NEVER MARRIED</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**
Display “currently” in bold, underlined text.

**QUESTION TEXT:**
Are you currently married, living with a partner, separated, divorced, widowed, or never married?

### HD2

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>HD3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**
If HD1 = 4 (DIVORCED), display "(most recent) marriage end". If HD1 = 5 (WIDOWED), display "spouse pass away".

**QUESTION TEXT:**
In what month and year did your {((most recent) marriage end/spouse pass away)?

**ENTER MONTH**

<table>
<thead>
<tr>
<th>ENTER NUMBER</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 12</td>
<td></td>
</tr>
<tr>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

### HD2a

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>HD3</th>
</tr>
</thead>
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<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
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<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**
If HD1 = 4 (DIVORCED), display "(most recent) marriage end". If HD1 = 5 (WIDOWED), display "spouse pass away".

**QUESTION TEXT:**
In what month and year did your {((most recent) marriage end/spouse pass away)?

**ENTER 4-DIGIT YEAR**

<table>
<thead>
<tr>
<th>ENTER NUMBER</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>1920 to 2010</td>
<td></td>
</tr>
<tr>
<td>REFUSED</td>
<td></td>
</tr>
</tbody>
</table>

DON'T KNOW

PROGRAMMER INSTRUCTIONS:
If Month and year entered are after TODAY’S MONTH AND YEAR, display error message #5.

HD3  

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) display "and your spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "and your partner".

QUESTION TEXT:
Do you {and your {spouse/partner} have any living children, including stepchildren?

CODES
1  YES
2  NO
  REFUSED
  DON’T KNOW

HD4

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED), display "and your spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "and your partner".

QUESTION TEXT:
How many children do you {and your {spouse/partner}} have?

ENTER NUMBER

Range  1 to 24
Soft Range  1 to 10
REFUSED  BOX HD6

HD5

QUESTION TEXT:
How many are under the age of 18?

ENTER NUMBER

IF NONE, ENTER ZERO

Range  0 to 24
Soft Range  0 to 10
REFUSED

PROGRAMMER INSTRUCTIONS:
Number of children under age 18 must be < or = number of children entered at HD4, or RF. Otherwise, display error message "The number of children under age 18 must be less than or equal to the total number of children."
If preloaded CG INHOUSEHOLD flag = 1 (YES, CAREGIVER LIVES WITH SP), go to HD7.
Otherwise, go to HD6.

HD6

**chd5numinhh**
C5 HD6 NUMBR OF PEOPLE LIVE HERE EXCLUDING CG

**chd5dnuminhh**
C5 D HD6 NUMBR OF PEOPLE LIVE HERE INCLUDING CG

**DISPLAY INSTRUCTIONS:**
Display “other” in bold underlined text.

**QUESTION TEXT:**
Not counting you, how many other people live here?
ENTER NUMBER
IF NO ONE ELSE, ENTER ZERO

**ENTER NUMBER**

Range 0 to 20
Soft Range 0 to 15
REFUSED
DON’T KNOW

HD7

**ch5educ**
C5 HD7 HIGHEST DEGREE OR GRADE

**ch5deduc**
C5 D HD7 HIGHEST DEGREE OR GRADE

**QUESTION TEXT:**
What is the highest degree or level of school you completed?

**CODES**

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

BOX HD8

**ch5eduscsprt**
C5 HD8 SPOUS PARTR HIGH DEGREE

**ch5deduscsprt**
C5 D HD8 SPOUS PARTR HIGH DEGREE

If HD1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HD8.
Otherwise, go to HD9.
DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED), display “spouse”.
If HD1 = 2 (LIVING WITH A PARTNER), display “partner”.

QUESTION TEXT:
What is the highest degree or level of school your {spouse/partner} completed?

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

HD9
chod5cgbirthm C5 HD9 CG BIRTHDATE MONTH
chod5dgbirthm C5 D HD9 CG BIRTHDATE MONTH
chod5gbirthyr C5 HD9 CG BIRTHDATE YEAR
chod5dgbirthyr C5 D HD9 CG BIRTHDATE YEAR
chod5dage C5 D HD9 CG AGE

QUESTION TEXT:
What is your date of birth?
ENTER MONTH, DAY, AND YEAR

REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Use mask to collect DOB. Separate mm/dd/yyyy with forward slashes for data entry.
Month range: 1-12
Day range: 1-31
Year range: (CURRENT YEAR-18) - (CURRENT YEAR-110)

BOX HD10
BOX HD10
NOT ON FILE

If HD1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to HD10.
Otherwise, go to HD11.

HD10
chod5spbrthm C5 HD10 SPOUS PARTR DOB MONTH
chod5dspbrthm C5 D HD10 SPOUS PARTR DOB MONTH
chod5spbrthyr C5 HD10 SPOUS PARTR DOB YEAR
DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

QUESTION TEXT:
What is your {spouse/partner}'s date of birth?
Enter month, day, and year

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Use mask to collect DOB. Separate mm/dd/yyyy with hyphens for data entry.
Month range: 1-12
Day range: 1-31
Year range: (CURRENT YEAR-18) - (CURRENT YEAR-110)

HD11  c5dgender  C5 D HD 11 12  CG GENDER

DISPLAY INSTRUCTIONS:
If CAREGIVER'S preloaded PERSON GENDER = 1 (male), display male.
If CAREGIVER'S preloaded PERSON GENDER = 2 (female), display female.

QUESTION TEXT:
CONFIRM GENDER OF RESPONDENT.
If gender is obvious, code without asking.
Otherwise, ask: We have you listed as {male/female}. Is that correct?

CODES
1  YES  SECTION EC
2  NO  SECTION EC
2  REFUSED  SECTION EC
2  DON'T KNOW  SECTION EC

HD12  c5dgender  C5 D HD 11 12  CG GENDER

QUESTION TEXT:
CODE GENDER OF RESPONDENT

CODES
1  MALE  Section EC
2  FEMALE  Section EC

Derived Variables from Items in HD Section

| c5dgender | C5 D HD 11 12  CG GENDER |
Now we'd like to ask you about your race and ethnic background.

What race do you consider yourself to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian or Pacific Islander?

CODES

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WHITE/CAUCASIAN</td>
</tr>
<tr>
<td>2</td>
<td>BLACK/AFRICAN AMERICAN</td>
</tr>
<tr>
<td>3</td>
<td>AMERICAN INDIAN/ALASKA NATIVE</td>
</tr>
<tr>
<td>4</td>
<td>ASIAN</td>
</tr>
<tr>
<td>5</td>
<td>NATIVE HAWAIIAN/PACIFIC ISLANDER</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

PROGRAMMER INSTRUCTIONS:
If more than one box checked in RL1, go to RL2. Otherwise, go to RL3.

Which do you consider your primary race?

CODES

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WHITE/CAUCASIAN</td>
</tr>
<tr>
<td>2</td>
<td>BLACK/AFRICAN AMERICAN</td>
</tr>
<tr>
<td>3</td>
<td>AMERICAN INDIAN/ALASKA NATIVE</td>
</tr>
<tr>
<td>4</td>
<td>ASIAN</td>
</tr>
<tr>
<td>5</td>
<td>NATIVE HAWAIIAN/PACIFIC ISLANDER</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

Do you consider yourself Hispanic or Latino?
<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Derived Variables from Items in RL Section

<table>
<thead>
<tr>
<th>variable</th>
<th>description</th>
</tr>
</thead>
<tbody>
<tr>
<td>crl5dcgracehisp</td>
<td>C5 D CG RACE AND HISPANIC ETHNICITY</td>
</tr>
<tr>
<td>crl5dsouce</td>
<td>C5 D SOUR RACE HISPANIC</td>
</tr>
</tbody>
</table>
Now I'd like to ask you some questions about work and jobs you may have had.

PRESS 1 AND ENTER TO CONTINUE

**EC1**

**C5 EC1 WORK FOR PAY LAST WEEK**

**DISPLAY INSTRUCTIONS:**

Spell out month for date display.

If TODAY's date is a Saturday, display "beginning on Sunday, {MONTH AND DAY OF SUNDAY PRIOR TO INTERVIEW}" and "today".

If TODAY'S date is not a Saturday, display "on Sunday, {MONTH AND DAY of SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE}" and "on Saturday,{MONTH AND DAY of SATURDAY PRIOR TO TODAY'S DATE}"

**QUESTION TEXT:**

Did you do any work for pay in the last week? By the last week, I mean the week beginning on Sunday, {MONTH AND DAY of SUNDAY PRIOR TO TODAY/MONTH AND DAY of SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE} and ending {today/on Saturday, {MONTH AND DAY of SATURDAY PRIOR TO TODAY'S DATE}?

**CODES**

1  YES
2  NO
3  RETIRED/DON'T WORK ANYMORE
   REFUSED
   DON'T KNOW

**EC2**

**C5 EC2 OWN FARM BUSINESS**

**DISPLAY INSTRUCTIONS:**

If HD1 = 1 (MARRIED), display "or your spouse".

IF HD1 = 2 (LIVING WITH A PARTNER), display "or your partner".

**QUESTION TEXT:**

Do you {or your {spouse/partner}} own a business or farm?

**CODES**

1  YES
2  NO
   REFUSED
   DON'T KNOW

**BOX EC3**

**NOT ON FILE**

If EC1 = 1 (YES, WORKED LAST WEEK), go to EC6.
If EC1 = 2 (NO), RF, or DK and EC2 = 2 (NO FARM OR BUSINESS), RF, or DK, go to EC4.
If EC1 = 3 (RETIRED) and EC2 = 2 (NO FARM OR BUSINESS), RF, or DK, go to EC21.
Otherwise, go to EC3.
**EC3**  
**cec5unpdwrk**  
C5 EC3 UNPAID WRK FAM BUS LST WK

**DISPLAY INSTRUCTIONS:**  
Display “unpaid” in bold underlined text.

**QUESTION TEXT:**  
Last week, did you do any unpaid work in the family business or farm?

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

**BOX EC4**  
**BOX EC4**  
NOT ON FILE

| IF EC1 = 3 ( RETIRED ), go to EC21.  
Otherwise, go to EC4. |

**EC4**  
**cec5misswork**  
C5 EC4 ABSENT FROM JOB LAST WEEK

**DISPLAY INSTRUCTIONS:**  
If EC3 = 1 (YES), display "another".  
Otherwise, display "a".

**QUESTION TEXT:**  
Do you have {a/another} job from which you were absent last week because of illness, vacation, or some other reason?

<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
<th>RETIRED/DON’T WORK ANYMORE</th>
<th>EC6</th>
<th>EC21</th>
</tr>
</thead>
</table>

| IF EC3 = 1 (YES), display "another".  
Otherwise, display "a". |

**EC5**  
**cec5look4wrk**  
C5 EC5 LOOKING FOR JOB LAID OFF

**QUESTION TEXT:**  
In the last week, were you looking for a job or were you on layoff from a job?

<table>
<thead>
<tr>
<th>CODES</th>
<th>YES, LOOKING FOR A JOB</th>
<th>YES, ON LAYOFF</th>
<th>NO</th>
<th>RETIRED/DON’T WORK ANYMORE</th>
<th>EC21</th>
<th>EC19PRE</th>
</tr>
</thead>
</table>

**EC6**  
**cec5wrkmulti**  
C5 EC6 HAVE MORE THAN ONE JOB

**QUESTION TEXT:**  
Last week, did you have more than one job, including part-time, evening, or weekend work?

<table>
<thead>
<tr>
<th>CODES</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>
EC7

c5hrsweek

C5 EC7 HRS PER WEEK AT MAIN JOB

DISPLAY INSTRUCTIONS:

If EC6 = 1 (YES, MORE THAN 1 JOB), display "main job" and "By main job, I mean the job at which you work the most hours."

Otherwise, display "job".

QUESTION TEXT:

How many hours per week do you usually work at your job/main job? {By main job, I mean the job at which you work the most hours.}

ENTER NUMBER OF HOURS USUALLY WORK

IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997

ENTER NUMBER

Range

1 to 120

Soft Range

1 to 80

REFUSED

BOX EC10

PROGRAMMER INSTRUCTIONS:

Allow entry of 997. If 997 entered, go to BOX EC8.

BOX EC8

BOX EC8

NOT ON FILE

If EC4 = 1 (YES, ABSENT LAST WEEK), go to EC9. Otherwise, go to EC8.

EC8

c5hrs1stwk

C5 EC8 NUMB HRS WORKED LAST WEEK

QUESTION TEXT:

How many hours did you work last week?

ENTER NUMBER OF HOURS

ENTER NUMBER

Range

1 to 120

Soft Range

1 to 80

REFUSED

DON'T KNOW

BOX EC9

BOX EC9

NOT ON FILE

If EC6 = 1 (YES, MORE THAN 1 JOB), go to EC10. Otherwise, go to EC11.

EC9

c5hrs1st

C5 EC9 HRS WRKED LST WEEK WORKED

QUESTION TEXT:

You said you were absent from work last week. How many hours did you work the last week you were at work?

ENTER NUMBER OF HOURS
**EC10**

**cec5hrswork**  
**C5 EC10 HOURS WORKED AT ALL JOBS**

**QUESTION TEXT:**
How many hours do you usually work on all of your jobs together?

**ENTER NUMBER OF HOURS**

<table>
<thead>
<tr>
<th>ENTER NUMBER</th>
<th>Range</th>
<th>Soft Range</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>1 to 120</td>
<td>1 to 80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EC11**

**cec5flexhrs**  
**C5 EC11 HAVE FLEXIBLE HOURS**

**QUESTION TEXT:**
Do you have flexible work hours that allow you to vary or make changes in the time you begin and end work?

**CODES**

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

**EC12**

**cec5wrksched**  
**C5 EC12 WORK SCHEDULE**

**DISPLAY INSTRUCTIONS:**
If EC6 = 1 (YES, WORKS MORE THAN 1 JOB), display "On your main job, do".
Otherwise, display "Do".

**QUESTION TEXT:**
{On you main job, do/Do} you usually work a daytime schedule or some other schedule?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>DAYTIME</th>
<th>SOME OTHER SCHEDULE</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**BOX EC13**

**BOX EC13**  
**NOT ON FILE**

If EC4 = 1 (YES, ABSENT FROM WORK), go to EC14.
Otherwise, go to EC13.
EC13  cec5msswrkmt  C5 EC13 EVER ABSENT FROM WORK

DISPLAY INSTRUCTIONS:
Spell out month for date display.

QUESTION TEXT:
Now thinking back over the last month, (by last month we mean the last 4 weeks or since \{CURRENT DATE MINUS 4 WEEKS\}), were you ever absent from work for any reason?

CODES

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td>EC17</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
<td>EC17</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>EC17</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>EC17</td>
</tr>
</tbody>
</table>

EC14  cec5mswkvctn  C5 EC14A MISS WORK VACATION
      cec5mswksick  C5 EC14B MISS WORK SICK
      cec5mswkhelp  C5 EC14C MISS WORK HELPING
      cec5mswkfmy  C5 EC14D MISS WORK FAM SICK
      cec5mswkpers  C5 EC14E MISS WORK PERSONAL

DISPLAY INSTRUCTIONS:
If EC4 = 1 (YES, ABSENT LAST WEEK), display "You said you were absent from work last week. Think about that time and any other time in the last month since \{CURRENT DATE MINUS 4 WEEKS\} when you missed work."
Otherwise, use null display.

Use "Same Question Stem" display.
If at EC14a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:
{\{}{\} You said you were absent from work last week. Think about that time and any other time in the last month since \{CURRENT DATE MINUS 4 WEEKS\} when you missed work.\} {\} 
{\{}{\} I will read a few reasons people miss work. For each one, please say "yes" if this was a reason you missed work over the last month, and say "no" if you did not miss work for this reason. \} {\} 

{variable text [a-e]}

RESPONSE [1] a. You were on vacation.
RESPONSE [2] b. You were sick.
RESPONSE [3] c. You took time off to help \{SP\}.
RESPONSE [4] d. Other family members were sick.
RESPONSE [5] e. You took personal time for other reasons.

IF NEEDED: For example, a school visit for a child, looking for a job, taking classes.

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>

PROGRAMMER INSTRUCTIONS:
Array the responses and variable text columns in the panel.
Display ‘variable text’ in the a-e sequence until all rows have been displayed.
If EC14c = 1 (YES, TOOK TIME OFF TO HELP SP), go to EC15.
Otherwise, go to EC17.

EC15  cec5mswkunit  C5 EC15 HRS MISS WORK HELP UNIT

QUESTION TEXT:
You said one of the reasons you were absent from work last month was because you were helping {SP}. About how many hours of work did you miss last month to do this?

CODES
1  ENTER NUMBER OF HOURS  EC15b
2  ENTER NUMBER OF DAYS  EC17
   REFUSED  EC17
   DON'T KNOW  EC17

PROGRAMMER INSTRUCTIONS:
Display EC15 and either EC15a or EC15b on the same screen.

EC15a  cec5mswkhlph  C5 EC15A NUM HRS MISS WORK HELP

QUESTION TEXT:
ENTER NUMBER OF HOURS

ENTER NUMBER

Range  1 to 600
Soft Range  1 to 160

PROGRAMMER INSTRUCTIONS:
Go To EC17.

EC15b  cec5mswkhlpd  C5 EC15B NUM DYS MISS WORK HELP

QUESTION TEXT:
ENTER NUMBER OF DAYS

ENTER NUMBER

Range  1 to 31

EC16  cec5wkhrperd  C5 EC16 NUM OF HOURS IN WORK DAY

QUESTION TEXT:
Were those 8-hour work days, something less, or something more?

CODES
1  8-HOUR DAYS
2  SOMETHING LESS
3  SOMETHING MORE
   REFUSED
   DON'T KNOW

EC17  cec5hlpafwk1  C5 EC17 HELPING AFFECTS WORK

QUESTION TEXT:
We are interested in whether helping {SP} affects you at work. In the last month, did helping {him/her} make it harder for you to get your work done?
EC18

c5hlpafwk2

QUESTION TEXT:
Please tell me how much helping {SP} affected you at work by picking a number from 1 to 10. The number 10 means helping {him/her} made your work a lot harder and the number 1 means helping {him/her} made your work a little harder.

ENTER NUMBER

ENTER NUMBER

Range

REFUSED

DON'T KNOW

1 to 10

EC19PRE

EC19PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If EC6 = 2 (NO), RF, or DK, display "your job".
If EC6 = 1 (YES, MORE THAN 1 JOB), display "your main job".
If EC5 = 2 (ON LAYOFF), display "the job you are on layoff from."

QUESTION TEXT:

Now I have two questions about {your job/your main job/the job you are on layoff from}.

PRESS 1 AND ENTER TO CONTINUE

EC19

c5busntype

C5 EC19 TYPE OF BUSINESS

QUESTION TEXT:

What kind of business or industry is this?

IF NEEDED: What do they make or where do you work?

ENTER INDUSTRY DESCRIPTION

ENTER TEXT

Length

REFUSED

DON'T KNOW

75

EC20

c5occupnt

C5 EC20 OCCUPATION

QUESTION TEXT:

What kind of work do you do, that is, what is your occupation? (For example, plumber, typist, farmer)

ENTER OCCUPATION DESCRIPTION

ENTER TEXT

Length

REFUSED

DON'T KNOW

150
EC21  cec5worktype  C5 EC21 TYPE WORK DURING LIFETIME

DISPLAY INSTRUCTIONS:
If EC20 not empty, display “also” and response option 2 (CURRENT OCCUPATION SAME).

QUESTION TEXT:
We are [also] interested in the work people did most of their lives. What kind of work was that? (In other words, what was your occupation?)

CODES
1  ENTER OCCUPATION
2  CURRENT OCCUPATION SAME  Section HI
97  NEVER WORKED ENTIRE LIFE  Section HI
98  HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME  Section HI
     REFUSED  Section HI
     DON’T KNOW  Section HI

EC21a  cec5occpdscr  C5 EC21A LIFETIME OCCUP DESCRIPT

QUESTION TEXT:
ENTER OCCUPATION DESCRIPTION

ENTER TEXT
Length  75

PROGRAMMER INSTRUCTIONS:
Go to Section HI - Health Insurance and Income
We have a few last questions.

PRESS 1 AND ENTER TO CONTINUE

**HI1**

**chi5medicare**

**C5 HI1 MEDICARE COVERAGE**

**QUESTION TEXT:**

Are you currently covered by Medicare, a health insurance program for persons 65 years and over and for persons with disabilities?

**CODES**

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

**HI2**

**chi5medigap**

**C5 HI2 MEDIGAP COVERAGE**

**QUESTION TEXT:**

Some people with Medicare also have a Medigap or Medicare Supplement plan. Do you have this type of health insurance coverage?

**CODES**

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

**HI3**

**chi5medicaid**

**C5 HI3 MEDICAID COVERAGE**

**DISPLAY INSTRUCTIONS:**

Display ", also known as {STATE NAME FOR MEDICAID PROGRAM}," if caregiver's state name for Medicaid is not "Medicaid."

Display {STATE NAME FOR SCHIP PROGRAM} for caregiver's state.

**QUESTION TEXT:**

Medicaid {, also known as {STATE NAME FOR MEDICAID PROGRAM},} and {STATE NAME FOR SCHIP PROGRAM} are state programs for low-income persons or for persons on public assistance.

Are you now covered by {STATE NAME FOR MEDICAID PROGRAM} or {STATE NAME FOR SCHIP PROGRAM}?  

**CODES**

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

**PROGRAMMER INSTRUCTIONS:**

Use NHATS State Name for Medicaid lookup file.
HI4  chi5privinsr  C5 HI4 PRIVATE INSURANCE COVERAGE

DISPLAY INSTRUCTIONS:
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "or your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

QUESTION TEXT:
Are you currently covered by a private health insurance plan?
IF NEEDED: This may be a policy you {or your {spouse/partner} have through a job, a labor union, or an association or organization you belong to. It may also be bought directly from an insurance agent or company.

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW

HI5  chi5tricare  C5 HI5 TRICARE OR CHAMPVA

QUESTION TEXT:
TRICARE and CHAMPVA are health care programs for active duty and retired members of the uniformed Armed Forces, their families, and survivors. Are you now covered by either one of these programs?

CODES
1  YES
2  NO
   REFUSED
   DON'T KNOW

BOX HI6  BOX HI6  NOT ON FILE

If HI1, HI3, HI4, and HI5 = 2 (NO), RF, or DK, go to HI6.
Otherwise, go to BOX HI8.

HI6  chi5uninsurd  C5 HI6 NO INSURANCE VERIFICATION

QUESTION TEXT:
Based on your answers, you are uninsured and do not currently have any health insurance. Is that correct?

CODES
1  YES  BOX HI8
2  NO  BOX HI8
   REFUSED  BOX HI8
   DON'T KNOW  BOX HI8

HI7  chi5insrtype  C5 HI7 KIND OF HEALTH INSURANCE

QUESTION TEXT:
What kind of health insurance do you have?

CODES
1  MEDICARE  BOX HI8
2  MEDICAID  BOX HI8
HI8

**chi5ownhome**
C5 HI8 OWN YOUR HOME

**chi5downhome**
C5 D HI8 OWN YOUR HOME

**DISPLAY INSTRUCTIONS:**
If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display {IF OWNERSHIP WITH [SPOUSE/PARTNER], CODE YES.}.
If HD1 = 1 (MARRIED), display "SPOUSE".
If HD1 = 2 (LIVING WITH A PARTNER), display "PARTNER".

**QUESTION TEXT:**
Do you own your home?
{IF OWNERSHIP IS WITH [SPOUSE/PARTNER], CODE YES.}

**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>
</tbody>
</table>

REFUSED
DON’T KNOW

HI9

**chi5chkacct**
C5 HI9A CG HAS CHECKING ACCT

**chi5dchkacct**
C5 D HI9A CG HAS CHECKING ACCT

**chi5svgsacct**
C5 HI9B CG HAS SAVINGS ACCOUNT

**chi5dsvgsacct**
C5 DHI9B CG HAS SAVINGS ACCOUNT

**chi5certdpst**
C5 HI9C CG HAS CERT OF DEPOSIT

**chi5dcertdpst**
C5 D HI9C CG HAS CERT OF DEPOSIT

**chi5retrplan**
C5 HI9D CG HAS RETIREMENT PLAN

**chi5dretrplan**
C5 D HI9D CG HAS RETIREMENT PLAN

**chi5mutlfdnds**
C5 HI9E CG HAS STOCKS MUT FUNDS

**chi5dmutlfdnds**
C5 D HI9E CG HAS STOCKS MUT FUNDS

If relationship of caregiver to SP = 2 (spouse/partner), go to Section CN, Closing. Otherwise, go to HI8.
**DISPLAY INSTRUCTIONS:**

If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "and your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

Use "Same Question Stem" display.

If at H1g, do not display question text in brackets.
Otherwise, display question text in brackets.

**QUESTION TEXT:**

{[} Do you {and your {spouse/partner}} have... {]}

{variable text [a-e]}

RESPONSE [1] a. any checking accounts?
RESPONSE [2] b. savings or money market accounts?
RESPONSE [3] c. certificates of deposit?
RESPONSE [4] d. retirement plans such as IRAs, SEPs, 401K, or 403b plans?
RESPONSE [5] e. stocks or mutual funds that are not in retirement accounts?

**CODES**

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

**PROGRAMMER INSTRUCTIONS:**

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

<table>
<thead>
<tr>
<th>HI10</th>
<th>chi5income</th>
<th>C5 HI10 INCOME LAST YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>chi5incimf</td>
<td>C5 F IMPUTED INCOME LAST YEAR FLG</td>
<td></td>
</tr>
<tr>
<td>chi5incimi1</td>
<td>C5 HI10 IMPUTED INCOME LAST YEAR INC1</td>
<td></td>
</tr>
<tr>
<td>chi5incim2</td>
<td>C5 HI10 IMPUTED INCOME LAST YEAR INC2</td>
<td></td>
</tr>
<tr>
<td>chi5incim3</td>
<td>C5 HI10 IMPUTED INCOME LAST YEAR INC3</td>
<td></td>
</tr>
<tr>
<td>chi5incim4</td>
<td>C5 HI10 IMPUTED INCOME LAST YEAR INC4</td>
<td></td>
</tr>
<tr>
<td>chi5incim5</td>
<td>C5 HI10 IMPUTED INCOME LAST YEAR INC5</td>
<td></td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

If HD1 = 1 (MARRIED) or HD1 = 2 (LIVING WITH A PARTNER), display "or your {spouse/partner}".
If HD1 = 1 (MARRIED), display "spouse".
If HD1 = 2 (LIVING WITH A PARTNER), display "partner".

If EC1 or EC4 = 1 (YES), display "from work and".

Display "last year" in bold underlined text.

**QUESTION TEXT:**

Now thinking about the income that you {and your {spouse/partner}} have {from work and} all other sources, about how much was your {and your {spouse/partner}’s} total income for the last year (in the last 12 months ending in December {CURRENT YEAR - 1}) before taxes?

IF NEEDED: We don’t need an exact dollar amount. The nearest thousand dollars is fine.
IF NEEDED: We know questions like these may be difficult to answer, but we need to know this detail to understand how people who are helping older relatives or friends are getting along financially these days.

ENTER TOTAL INCOME FOR LAST YEAR

ENTER NUMBER

<table>
<thead>
<tr>
<th>Range</th>
<th>1 to 9999999</th>
</tr>
</thead>
<tbody>
<tr>
<td>REFUSED</td>
<td>HI14</td>
</tr>
<tr>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

PROGRAMMER INSTRUCTIONS:
Display dollar amount entries using 1000 comma separator.
If amount entered, go to HI14

BOX HI11

Compute CAREGIVER HHSIZE:
If CAREGIVER has INHOUSEHOLD flag = 1, use NHATS HH SIZE.
Otherwise, CAREGIVER HHSIZE = number entered at HD6 +1.

The following table presents the poverty guidelines used to compute the percentage of poverty amounts for HH11-HH13. The amounts displayed in HH11-HH13 are based on the amounts presented for the caregiver’s computed HHSIZE.

<table>
<thead>
<tr>
<th>HHSIZE</th>
<th>2010 Poverty Guidelines</th>
<th>100% of poverty</th>
<th>200% of poverty</th>
<th>400% of poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$10,800</td>
<td>$10,800</td>
<td>$21,600</td>
<td>$43,200</td>
</tr>
<tr>
<td>2</td>
<td>$14,600</td>
<td>$14,600</td>
<td>$29,200</td>
<td>$58,400</td>
</tr>
<tr>
<td>3</td>
<td>$18,300</td>
<td>$18,300</td>
<td>$36,600</td>
<td>$73,200</td>
</tr>
<tr>
<td>4</td>
<td>$22,200</td>
<td>$22,200</td>
<td>$44,400</td>
<td>$88,800</td>
</tr>
<tr>
<td>5</td>
<td>$25,800</td>
<td>$25,800</td>
<td>$51,600</td>
<td>$103,200</td>
</tr>
<tr>
<td>6</td>
<td>$29,500</td>
<td>$29,500</td>
<td>$59,000</td>
<td>$118,000</td>
</tr>
<tr>
<td>7</td>
<td>$33,300</td>
<td>$33,300</td>
<td>$66,600</td>
<td>$133,200</td>
</tr>
<tr>
<td>8+</td>
<td>$37,000</td>
<td>$37,000</td>
<td>$74,000</td>
<td>$148,000</td>
</tr>
</tbody>
</table>

HI11

chi5inc200pv

C5 HI11 INCOME CATEGORIES 200

DISPLAY INSTRUCTIONS:
Display for {200% OF POVERTY GUIDELINE} uses the following conditions:
If CAREGIVER HHSIZE = 1, set 200% OF POVERTY GUIDELINE = $21,600 and display "21,600".
If CAREGIVER HHSIZE = 2, set 200% OF POVERTY GUIDELINE = $29,200 and display "29,200".
If CAREGIVER HHSIZE = 3, set 200% OF POVERTY GUIDELINE = $36,600 and display "36,600".
If CAREGIVER HHSIZE = 4, set 200% OF POVERTY GUIDELINE = $44,400 and display "44,400".
If CAREGIVER HHSIZE = 5, set 200% OF POVERTY GUIDELINE = $51,600 and display "51,600".
If CAREGIVER HHSIZE = 6, set 200% OF POVERTY GUIDELINE = $59,000 and display "59,000".
If CAREGIVER HHSIZE = 7, set 200% OF POVERTY GUIDELINE = $66,600 and display "66,600".
If CAREGIVER HHSIZE = or >8, set 200% OF POVERTY GUIDELINE = $74,000 and display "74,000".

QUESTION TEXT:
Was it less than or more than $\{200\%\ OF\ POVERTY\ GUIDELINE\}$?

CODES

<table>
<thead>
<tr>
<th>1</th>
<th>LESS THAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>MORE THAN</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>
HI12  

DISPLAY INSTRUCTIONS:

Display for {100% OF POVERTY GUIDELINE} uses the following conditions:
If CAREGIVER HHSIZE = 1, set 100% OF POVERTY GUIDELINE to $10,800 and display "$10,800".
If CAREGIVER HHSIZE = 2, set 100% OF POVERTY GUIDELINE to $14,600 and display "$14,600".
If CAREGIVER HHSIZE = 3, set 100% OF POVERTY GUIDELINE to $18,300 and display "$18,300".
If CAREGIVER HHSIZE = 4, set 100% OF POVERTY GUIDELINE to $22,200 and display "$22,200".
If CAREGIVER HHSIZE = 5, set 100% OF POVERTY GUIDELINE to $25,800 and display "$25,800".
If CAREGIVER HHSIZE = 6, set 100% OF POVERTY GUIDELINE to $29,500 and display "$29,500".
If CAREGIVER HHSIZE = 7, set 100% OF POVERTY GUIDELINE to $33,300 and display "$33,300".
If CAREGIVER HHSIZE = or > 8, set 100% OF POVERTY GUIDELINE to $37,000 and display "$37,000".

QUESTION TEXT:

Was it less than or more than $\{100\% OF POVERTY GUIDELINE\}$?

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>HI14</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
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<td>2</td>
<td>MORE THAN</td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

HI13  

DISPLAY INSTRUCTIONS:

Display for {400% OF POVERTY GUIDELINE} uses the following conditions:
If CAREGIVER HHSIZE = 1, set 400% OF POVERTY GUIDELINE = $43,200 and display "$43,200".
If CAREGIVER HHSIZE = 2, set 400% OF POVERTY GUIDELINE to $58,400 and display "$58,400".
If CAREGIVER HHSIZE = 3, set 400% OF POVERTY GUIDELINE = $73,200 and display "$73,200".
If CAREGIVER HHSIZE = 4, set 400% OF POVERTY GUIDELINE = $88,800 and display "$88,800".
If CAREGIVER HHSIZE = 5, set 400% OF POVERTY GUIDELINE = $103,200 and display "$103,200".
If CAREGIVER HHSIZE = 6, set 400% OF POVERTY GUIDELINE = $118,000 and display "$118,000".
If CAREGIVER HHSIZE = 7, set 400% OF POVERTY GUIDELINE = $133,200 and display "$133,200".
If CAREGIVER HHSIZE = or > 8, set 400% OF POVERTY GUIDELINE = $148,000 and display "$148,000".

QUESTION TEXT:

Was it less than or more than $\{400\% OF POVERTY GUIDELINE\}$?

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>HI14</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LESS THAN</td>
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</tr>
<tr>
<td>2</td>
<td>MORE THAN</td>
<td></td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

HI14  

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.
If at HI14a, do not display question text in brackets.
Otherwise, display question text in brackets.
QUESTION TEXT:

{variable text [a-f]}

RESPONSE [1] a. {SP}'s medications or medical care?
RESPONSE [2] b. {SP}'s Medicare premiums or copayments or other insurance premiums and copayments?
RESPONSE [3] c. mobility devices for {SP} such as walkers, canes, or wheelchairs?
RESPONSE [4] d. features that made {SP}'s home safer such as a railing or a ramp, grab bars in the bathroom, a seat for the shower or tub, or an emergency call system?
RESPONSE [5] e. any other assistive devices for {SP} that make it easier or safer for {him/her} to do activities or do them on {his/her} own? This includes devices to help {him/her} see, hear, reach, hold things, or pick things up.
RESPONSE [6] f. a paid in-home helper for {SP}?

CODES

1 YES
2 NO
REJECTED
DONT KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX HI15

If HI4a-f = 2 (NO), RF, or DK, go to HI18.
Otherwise, go to HI15

HI15

chi5pay1000 C5 HI15 MORE THAN 1000 TO HELP

DISPLAY INSTRUCTIONS:

If HI4a = 1 (YES), display "{SP}'s medications or medical care".
If HI4b = 1 (YES), display "{SP}'s Medicare or other insurance premiums or copayments".
If HI4c = 1 (YES), display "the mobility devices".
If HI4d = 1 (YES), display "the features that made {SP}'s home safer".
If HI4e = 1 (YES), display "other assistive devices for {SP}".
If HI4f = 1 (YES), display "a paid in-home helper for {SP}".
If more than one item displayed, display "and" between each one.

QUESTION TEXT:

Altogether last year, would you say you paid more or less than $1,000 for {{SP}'s medications or medical care}{{SP}'s Medicare or other insurance premiums or copayments} {the mobility devices} {the features that made {SP}'s home safer} {other assistive devices for {SP}} {a paid in-home helper for {SP}}?

CODES

1 MORE THAN $1,000
2 LESS THAN $1,000
REJECTED HI17
DONT KNOW HI18

HI16

chi5pay2000 C5 HI16 MORE THAN 2000 TO HELP

QUESTION TEXT:

Was it more than $2,000?

CODES
<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th></th>
<th></th>
<th>否</th>
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<th></th>
<th>未回答</th>
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**HI17**

**chi5pay500**  
C5 HI17 LESS THAN 500 TO HELP

**QUESTION TEXT:**

Was it less than $500?

**CODES**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th>否</th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th>不知道</th>
<th></th>
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</tr>
</tbody>
</table>

**HI18**

**chi5gifttosp**  
C5 HI18 FINANCIAL GIFT TO SP

**QUESTION TEXT:**

Last year, ending December 31, 2010, did you give any financial help or gifts to {SP}?

**CODES**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th>否</th>
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<th>未回答</th>
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</table>

**HI19**

**chi5gift500**  
C5 HI19 GFT MOR OR LESS THAN 500

**QUESTION TEXT:**

For the year {CURRENT YEAR-1}, was that more or less than $500?

**CODES**

<table>
<thead>
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<th>MORE THAN $500</th>
<th></th>
<th></th>
<th>否</th>
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<th></th>
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</tbody>
</table>

**HI20**

**chi5gift1000**  
C5 HI20 GFT TO SP MOR THAN 1000

**QUESTION TEXT:**

Was that more than $1000?

**CODES**

<table>
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<th></th>
<th></th>
<th>否</th>
<th></th>
<th></th>
<th>未回答</th>
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<th></th>
<th>不知道</th>
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**HI21**

**chi5gift100**  
C5 HI21 GFT TO SP LESS THAN 100

**QUESTION TEXT:**

Was that less than $100?

**CODES**

<table>
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<th>否</th>
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</table>
### HI22

**chi5fromsp**  
C5 HI22 FINANCIAL GIFT FROM SP

**DISPLAY INSTRUCTIONS:**
Display “Last year” in bold underlined text.

**QUESTION TEXT:**
Last year, ending December 31, 2010, did you receive any financial help or gifts from {SP}?

**CODES**

<table>
<thead>
<tr>
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<tbody>
<tr>
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</table>

### HI23

**chi5frsp500**  
C5 HI23 GFT FRM SP MOR LESS 500

**QUESTION TEXT:**
For the year {CURRENT YEAR -1}, was that more or less than $500?

**CODES**

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<tr>
<th></th>
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<tbody>
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</table>

### HI24

**chi5frsp1000**  
C5 HI24 GFT FRM SP MORE THN 1000

**QUESTION TEXT:**
Was that more than $1,000?

**CODES**

<table>
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<tbody>
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<tr>
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<tr>
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### HI25

**chi5frsp100**  
C5 HI25 GFT FRM SP LESS THN 100

**QUESTION TEXT:**
Was that less than $100?

**CODES**

<table>
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</tr>
</thead>
<tbody>
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<td>NO</td>
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<td></td>
<td>DON’T KNOW</td>
<td>SECTION CN</td>
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