
NHATS Round 1

Section IS [INTERVIEW SETUP]

Sequence: 1

IS1

IS1

NOT ON FILE

QUESTION TEXT:

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

IF THIS IS CORRECT, PRESS 1 AND ENTER TO CONTINUE

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

IS2

is1resptype

R1 IS2 TYPE OF RESPONDENT

op1proxy

R1 IS2 PROXY

QUESTION TEXT:

SELECT TYPE OF RESPONDENT

CODES

1	SAMPLE PERSON (SP)	BOX IS2C
2	PROXY	

PROGRAMMER INSTRUCTIONS:

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

IS2A

is1reasnprx1

R1 IS2A PROXY REAS SP DEMENTIA

is1reasnprx2

R1 IS2A PROXY REAS SP ILL

is1reasnprx3

R1 IS2A PRXY REAS SP SPCH IMPAIR

is1reasnprx4

R1 IS2A PRXY REAS SP HEAR IMPAIR

is1reasnprx5

R1 IS2A PROXY REAS LANG BARRIER (from IS2B)

is1reasnprx6

R1 IS2A PROXY REAS TEMP UNAVAIL (from IS2B)

is1reasnprx9

R1 IS2A PROXY REAS OTHER

QUESTION TEXT:

SPECIFY REASON FOR PROXY

SELECT ALL THAT APPLY

CODES

Code All That Apply

1	DEMENTIA OR COGNITIVE IMPAIRMENT REPORTED BY PROXY	BOX IS2C
2	SP TOO ILL	BOX IS2C
3	SP SPEECH IMPAIRED	BOX IS2C
4	SP HEARING IMPAIRED	BOX IS2C
91	OTHER (SPECIFY)	

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

IS2B**IS2B**

NOT ON FILE

QUESTION TEXT:

SPECIFY REASON FOR PROXY

ENTER TEXT

Length

50

BOX IS2C**BOXIS2C**

NOT ON FILE

QUESTION TEXT:

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

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

ELSE GO TO IS2C.

IS2C**IS2C**

NOT ON FILE

DISPLAY INSTRUCTIONS:

DO NOT DISPLAY RESPONSE CODES AND LABELS

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

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

CODES

1	CONSENT TO RECORDING
7	REFUSE CONSENT TO RECORD

IS3

IS2D

PROGRAMMER INSTRUCTIONS:

IF IS2c=1 (OK TO RECORD), SET AUDIORECORDING FLAG=1 (YES).

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

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

ELSE IF IS2c=7 (REFUSED TO RECORD), SET AUDIORECORDING FLAG =2 (NO). IF RESPONDENT TYPE AT IS2=1 (SP), SET SPAUDIOASSENT FLAG = 2 (NO).

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

DO NOT DISPLAY THIS SCREEN ON BACK UP OR RESTARTS UNLESS RESPONDENT TYPE IS CHANGED AT IS2 ON RESTART.

IS2D

IS2D

NOT ON FILE

QUESTION TEXT:

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

PRESS1 AND ENTER TO CONTINUE

IS3

IS3

NOT ON FILE

QUESTION TEXT:

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

SPELL OUT SP'S NAME. CONFIRM SPELLING.

CODE

1	YES	IS4
2	NO	

IS3A

IS3A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP name in the response fields.

Display "FIRST" in bold underlined text.

Display SP first name in fill as bold underlined.

QUESTION TEXT:

What is the correct spelling of {your/SPs} full name?

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

CORRECT FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

IS3B

IS3B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "MIDDLE" in bold underlined text.

Display SP middle name in fill as bold underlined.

QUESTION TEXT:

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

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

CORRECT MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

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

Allow empty.

IS3C**IS3C**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

Display SP last name in fill as bold underlined

QUESTION TEXT:

What is the correct spelling of {your/SPs} full name?

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

CORRECT LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

Write SP name (preloaded or updated spelling if corrected IS3c) as the first entry on the person roster.

IS4**r1dgender**

R1 D GENDER OF SP

QUESTION TEXT:

THE SP IS LISTED AS A {MALE/FEMALE}

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

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

CODE

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

BOX IS4A**BOXIS4A**

NOT ON FILE

Compare preloaded gender of SP with IS4 value just entered. If they are the same, go to IS5.
Otherwise, go to IS4a

IS4A**IS4A**

NOT ON FILE

QUESTION TEXT:

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

CODE

1	YES
2	NO

IS4

IS5**r1dbirthmth (Sensitive)**

R1 D BIRTH MONTH OF SP

r1dbirthyr (Sensitive)

R1 D BIRTH YEAR OF SP

DISPLAY INSTRUCTIONS:

Display preloaded DOB in the question text.
SPELL OUT MONTH WHEN DISPLAYING {BIRTH MONTH BIRTH DAY, BIRTH YEAR}.
FORMAT AS MM/DD/YYYY WHEN DISPLAYING ({BIRTH MM/BIRTH DD/BIRTH YEAR}).

QUESTION TEXT:

I also want to confirm {your/SP's} birth date is {BIRTH MONTH BIRTH DAY, BIRTH YEAR} ({BIRTH MM/BIRTH DD/BIRTH YEAR}). Is that correct?

CODES

1	YES
2	NO

BOX IS8

IS6**r1dbirthmth(Sensitive)**

R1 D BIRTH MONTH OF SP

r1dbirthyr(Sensitive)

R1 D BIRTH YEAR OF SP

QUESTION TEXT:

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

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

PROGRAMMER INSTRUCTIONS:

Separate mm/dd/yyyy with hyphens for data entry.
MONTH range: 1-12
DAY range: 1-31
YEAR range: (CURRENT YEAR-65) - (CURRENT YEAR-110)

IS7	r1dintvrage (Sensitive)	R1 D AGE OF SP AT INTERVIEW
	r1d2intvrage	R1 D SP CAT AGE AT INTVW

DISPLAY INSTRUCTIONS:

COMPUTE AGE AS (CURRENT DATE – IS6 DOB).

QUESTION TEXT:

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

CODES

1	YES	
2	NO	IS6

BOX IS8

BOXIS8

NOT ON FILE

Write SP name, gender, date of birth, and calculated age (from IS7) to the PERSON ROSTER.
Set relationship to SP =1 (SAMPLE PERSON).

If IS2 = 1 (SP), go to Section RE RESIDENCE.
If IS2 = 2 (PROXY), go to IS8a.

IS8A

IS8A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display “FIRST” in bold underlined text.

QUESTION TEXT:

What is your full name?

ENTER FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

IS8a, IS8b, and IS8c are displayed on the same screen.

IS8B

IS8B

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display “MIDDLE” in bold underlined text.

QUESTION TEXT:

ENTER MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

IS8a, IS8b, and IS8c are displayed on the same screen.

IS8C

IS8C

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

QUESTION TEXT:

ENTER LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

IS8a and IS8b are displayed on the same screen.

WRITE PROXY NAME AS SECOND ENTRY ON PERSON ROSTER. SET PROXY RESP FLAG=1 FOR PERSON IDENTIFIED AS PROXY RESPONDENT.

IS9

is1prxyrelat

R1 IS9 PROXY RELATIONSHIP TO SP

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Do not display response category 1.

Display PROXY RELATIONSHIP CODE LIST.

QUESTION TEXT:

How are you related to {SP}?

IF NEEDED: Are you {hisher}....?

CODE RELATIONSHIP OF PROXY TO SP

PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER

11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	NOT RELATED

PROGRAMMER INSTRUCTIONS:

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

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

If IS9 = 91 or 92, go to IS9a
Otherwise, GO TO IS10.

IS9A

IS9A

NOT ON FILE

QUESTION TEXT:

SPECIFY RELATIONSHIP OF PROXY TO {SP}

ENTER TEXT

Length

50

IS10**is1prxygendr**
op1gender

R1 IS10 PROXY GENDER

R1 OTHER PERSON GENDER

QUESTION TEXT:

CODE GENDER OF PROXY

IF GENDER IS OBVIOUS, CODE WITHOUT ASKING

OTHERWISE ASK: Are you male or female?

CODES

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

BOX IS11**BOXIS11**

NOT ON FILE

Write PROXY relationship and gender to PERSON ROSTER.

IS11**is1famrrutin**

R1 IS11 FAMILRTY SP DAILY ROUTIN

QUESTION TEXT:

How familiar are you with {SP}'s daily routine? Are you very familiar, somewhat familiar, a little familiar, or not at all familiar?

CODES

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

PROGRAMMER INSTRUCTIONS

GO TO SECTION RE RESIDENCE

Derived Variables from Items in IS Section

is1dproxyid	R1 D PROXY OPID
r1d2intvrage	R1 D SP CAT AGE AT INTVW

NHATS Round 1

Section	RE	[RESIDENCE]	Sequence: 2
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RE1	re1resistrct	R1 RE1 RESIDNCE PHYSICAL STRCTUR
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QUESTION TEXT:

CODE PHYSICAL STRUCTURE OF SP'S RESIDENCE

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

CODES

1	FREE STANDING (DETACHED) SINGLE HOUSE	RE3
2	SINGLE HOUSE BUT ATTACHED TO OTHERS (ROW HOUSE, TOWNHOUSE, DUPLEX, TRIPLEX, OR TRIPLE DECKER)	RE3
3	MOBILE HOME OR TRAILER	RE3
4	MULTI-UNIT (2+) BUILDING	RE2
91	OTHER (SPECIFY)	RE1a

PROGRAMMER INSTRUCTIONS:

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

RE1a	RE1a	NOT ON FILE
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QUESTION TEXT:

SELECT TYPE OF STRUCTURE

ENTER TEXT

Length	25
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RE2	re1bldgfl	R1 RE2 SP BLDG MORE THAN ONE FLOOR
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QUESTION TEXT:

CODE NUMBER OF FLOORS OF STRUCTURE

CODES

1	BUILDING HAS ONE FLOOR
2	BUILDING HAS MULTIPLE FLOORS

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set NUMFLOORS flag=1

If 2 is selected, set NUMFLOORS flag=2

RE3**RE3**

NOT ON FILE

QUESTION TEXT:

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

CONFIRM SPELLING

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

IF COMPLETE ADDRESS NOT DISPLAYED, ENTER 2.

[Is that correct?]

CODES

1	YES	RE5
2	NO	

RE4a**RE4a**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

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

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

Display "address" as underlined text.

Display preloaded SP address in the question text.

QUESTION TEXT:

What is {your/SP's} address?

CONFIRM SPELLING

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

ENTER TEXT

Length

25

RE4b**RE4b**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text

Display preloaded address line 2 in the response field if available
Display RE4a, 4b, 4c, 4d, and 4e on the same screen
Display {Address 1}, {City}, {State}, and {Zip} fields as lighter "grayed out" text.
Display "address" as underlined text

Display preloaded SP address in the question text.

QUESTION TEXT:

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

CONFIRM SPELLING

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

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

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

Allow empty

RE4c

re1spadrscty (Restricted)

R1 RE SP ADDRESS CITY

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text
Display preloaded city in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 1}, {Address 2}, {State}, and {Zip} fields as lighter "grayed out" text.

Display "city" as underlined text.

Display preloaded SP address in the question text.

QUESTION TEXT:

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

CONFIRM SPELLING

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

ENTER TEXT

Length 25

RE4d

re1spadrsstt (Restricted)

R1 RE SP ADDRESS STATE

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text

Display preloaded state in the response field if available. Display RE4a, 4b, 4c, 4d, and 4e on the same screen.
Display {Address 1}, {Address 2}, {City}, and {Zip} fields as lighter "grayed out" text.
Display "state" as underlined text.

Display preloaded SP address in the question text.

QUESTION TEXT:

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

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

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

ENTER TEXT

Length

2

PROGRAMMER INSTRUCTIONS:

Use lookup file of state names

RE4e

re1spadrszip (Restricted)

R1 RE SP ADDRESS ZIP CODE

DISPLAY INSTRUCTIONS:

Display preloaded SP address in the question text
Display preloaded zip code in the response field if available.
Display RE4a, 4b, 4c, 4d, and 4e on the same screen
Display {Address 1}, {Address 2}, {City}, and {State} fields as lighter, "grayed out" text
Display "zip code" as underlined text.

Display preloaded SP address in the question text.

QUESTION TEXT:

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

ENTER A 5-DIGIT ZIP CODE

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

ENTER TEXT

Length

5

PROGRAMMER INSTRUCTIONS:

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

RE5

RE5

NOT ON FILE

QUESTION TEXT:

Is this {your/SPs} mailing address?

CODES

1	YES	GO TO HC
2	NO	

RE6a**RE6a**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length 25

RE6b**RE6b**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM ADDRESS

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

Allow empty

RE6c**RE6c**

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXT

Length

25

RE6d**RE6d**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display RE6a, 6b, 6c, 6d, and 6e on the same screen

Display "state" as underlined text

QUESTION TEXT:

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

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

Length

2

PROGRAMMER INSTRUCTIONS:

Use lookup file of state names

RE6c**RE6e**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display RE6a, 6b, 6c, 6d, and 6e on the same screen

Display "zip code" as underlined text

QUESTION TEXT:

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

ENTER a 5-DIGIT ZIP CODE

ENTER TEXT

Length

5

PROGRAMMER INSTRUCTIONS:

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

GO TO SECTION HC HEALTH CONDITIONS

Derived Variables from Items in RE Section**re1dcensdiv** R1 D SP CENSUS DIVISION**Flag Variables set in RE Section****f1structure** R1 F RE STRUCTURE OF SP DWELLING**f1bldgfl** R1 F RE SP BLDG MORE THAN ONE FLOOR

NHATS Round 1

Section HC [HEALTH CONDITIONS]

Sequence: 3

HC1PRE

HC1PRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HC1

hc1health

R1 HC1 OVERALL HEALTH CONDITION

QUESTION TEXT:

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

CODES

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

HC2

hc1disescn1

R1 HC2 SP HAD HEART ATTACK

hc1disescn2

R1 HC2 SP HAS HEART DISEASE

hc1disescn3

R1 HC2 SP HAS HIGH BLOOD PRESS

hc1disescn4

R1 HC2 SP HAS ARTHRITIS

hc1disescn5

R1 HC2 SP HAS OSTEOPOROSIS

hc1disescn6

R1 HC2 SP HAS DIABETES

hc1disescn7

R1 HC2 SP HAS LUNG DISEASE

hc1disescn8

R1 HC2 SP HAD STROKE

hc1disescn9

R1 HC2 SP HAS DEMENTIA OR ALZH

hc1disescn10

R1 HC2 SP HAS CANCER

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

Otherwise, display question text in brackets.

QUESTION TEXT:

{[]} I will read a list of some diseases and conditions that a doctor may have said {you have/SP has}. Please tell me if a doctor ever told {you/him/her} that {you/he/she} had{[]}

{variable text [a-j]}

- RESPONSE [1] a. a heart attack or myocardial infarction?
RESPONSE [2] b. any heart disease including angina or congestive heart failure?
RESPONSE [3] c. high blood pressure or hypertension?
RESPONSE [4] d. arthritis (including osteo or rheumatoid arthritis)?
RESPONSE [5] e. osteoporosis or thinning of the bones?
RESPONSE [6] f. diabetes?
RESPONSE [7] g. lung disease, such as emphysema, asthma, or chronic bronchitis?
RESPONSE [8] h. a stroke?
RESPONSE [9] i. dementia or Alzheimer's Disease?
RESPONSE [10] j. cancer?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX HC3

BOXHC3

NOT ON FILE

QUESTION TEXT:

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

HC3

hc1cancerty1

R1 HC3 SP HAD SKIN CANCER

hc1cancerty2 (Sensitive)

R1 HC3 SP HAD BREAST CANCER

hc1cancerty3 (Sensitive)

R1 HC3 SP HAD PROSTATE CANCER

hc1cancerty4 (Sensitive)

R1 HC3 SP HAD BLADDER CANCER (from HC3b)

hc1cancerty5 (Sensitive)

R1 HC3 SP HAD CRV OVRN UTRN CNCR (from HC3b)

hc1cancerty6 (Sensitive)

R1 HC3 SP HAD COLON CANCER (from HC3b)

hc1cancerty7 (Sensitive)

R1 HC3 SP HAD KIDNEY CANCER (from HC3b)

hc1cancerty8 (Sensitive)

R1 HC3 SP HAD OTHER CANCER

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES	CODE ALL THAT APPLY	
1	SKIN CANCER	BOX HC4
2	BREAST CANCER	BOX HC4
3	{PROSTATE CANCER}	BOX HC4
91	OTHER TYPE OF CANCER (SPECIFY)	
	REFUSED	BOX HC4
	DON'T KNOW	BOX HC4

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

HC3B

HC3B

NOT ON FILE

QUESTION TEXT:

SPECIFY TYPE OF CANCER

IF NEEDED: What type of cancer was this?

ENTER TEXT

Length

25

REFUSED

DON'T KNOW

BOXHC4

BOXHC4

NOT ON FILE

If HC2i = 1 (YES), go to HC4.
Otherwise, go to HC5.

HC4

hc1dementage

R1 HC4 AGE TOLD HAD DEMENTIA

QUESTION TEXT:

How old {were you/was SP} when {you were/{he/she} was} told {you have/{he/she} had} dementia or Alzheimer's disease?

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

ENTER AGE

ENTER NUMBER

Range

40 to 110

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS

Range 40-110

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

HC5

hc1brokebon1

R1 HC5A SP BROKEN OR FRACT HIP

hc1brokebon2

R1 HC5B SP OTHR BRKN FRACT BONE

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display.

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

QUESTION TEXT:

{[}Since age 50 has a doctor told {you/SP} that {you have/{he/she} has}{]}

{variable text [a-b]}

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

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

HC6**hc1serdisill**

R1 HC6 SP OTHR SER DIS ILLNES

QUESTION TEXT:

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

CODES

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

HC6A**HC6A**

NOT ON FILE

QUESTION TEXT:

What is that (serious disease or illness)?

ENTER TEXT

- Length
REFUSED
DON'T KNOW

75

PROGRAMMER INSTRUCTIONS:

Field length 75.

HC7**hc1hosptstay**

R1 HC7 SP HOSP STAY LAST 12MOS

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

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

CODE

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

PROGRAMMER INSTRUCTIONS:

Display month as word.

HC8**hc1hosovrnht**

R1 HC8 SP NUM OF HOSP STAYS

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

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

ENTER NUMBER

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Numeric field length 3.

Hard range 1-365

Soft range 1-12

HC9PRE**HC9PRE**

NOT ON FILE

QUESTION TEXT:

Next I have a few questions about any types of surgery {you/SP} may have had.

PRESS 1 AND ENTER TO CONTINUE

HC9A**hc1kneesurg**

R1 HC9A HAD KNEE SURGERY

DISPLAY INSTRUCTIONS:

Items HC9a-HC13c should be displayed as a grid with four columns in the response area:

- 1st: Item text
 2nd: Yes/no response to surgery (a)
 3rd: Yes/no if surgery was in last 12 months (b)
 4th: If not in last 12 months, age at last surgery

QUESTION TEXT:

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

Knee repair or replacement?

CODES

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

HC9B

hc1knesrgyr

R1 HC9B KNEE SURGERY IN 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC9C

hc1ageknesur

R1 HC9C AGE AT LAST KNEE SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range	18 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range 18-110

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

HC10A

hc1hipsurg

R1 HC10A HIP REPAIR OR REPLACMNT

QUESTION TEXT:

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

CODES

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

HC10B**hc1hipsrgyr**

R1 HC10B HIP SURG IN 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC10C**hc1agehipsur**

R1 HC10C AGE AT LAST HIP SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range	40 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range 40-110

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

HC11A**hc1catarsurg**

R1 HC11A HAD CATARACT SURGERY

QUESTION TEXT:

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

CODES

1	YES	
2	NO	HC12A
	REFUSED	HC12A
	DON'T KNOW	HC12A

HC11B**hc1catrsrgyr**

R1 HC11B CATER SURG IN 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

1	YES	HC12A
2	NO	
	REFUSED	HC12A
	DON'T KNOW	HC12A

HC11C**hc1agecatsur**

R1 HC11C AGE AT LAST CATRCT SURG

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range	40 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS

Range 40-110

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

HC12A**hc1bckspnsur**

R1 HC12A HAD BACK OR SPINE SURGR

QUESTION TEXT:

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

CODES

1	YES	
2	NO	HC13A

REFUSED	HC13A
DON'T KNOW	HC13A

HC12B **hc1backsrgyr** R1 HC12B BCK SPNE SURGR 12 MNTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC12C **hc1agebcksrg** R1 HC12C AGE AT LAST BACK SURGRY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

Range	20 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS

Range 20-110

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

HC13A **hc1heartsurg** R1 HC13A HAD HEART SURGERY

QUESTION TEXT:

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

CODES

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

HC13B **hc1hartsrgyr** R1 HC13B HEART SURGERY 12 MONTHS

DISPLAY INSTRUCTIONS:

Spell out month name in question text.

QUESTION TEXT:

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

CODES

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

HC13C

hc1agehrtsrg

R1 HC13C AGE LAST HEART SURGERY

QUESTION TEXT:

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

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

ENTER AGE

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS

Hard range 1-110

Soft range 20-80

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

HC14PRE

HC14PRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HC14

hc1flsinmth

R1 HC14 FALL DOWN IN LAST MONTH

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

1	YES
---	-----

2

NO
REFUSED
DON'T KNOW

HC15

hc1worryfall

R1 HC15 WORRIED ABOT FALLNG DOWN

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

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

HC16

hc1worrylimt

R1 HC16 WORRY EVR LIMT ACTIVTIES

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

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

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

BOX HC17

BOX HC17

NOT ON FILE

QUESTION TEXT:

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

Otherwise, go to HC17.

HC17

hc1faleninyr

R1 HC17 FALLEN DOWN IN 12 MONTHS

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

In the last 12 months {have you/has SP} fallen down?

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

CODES

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

HC18**hc1multifall**

R1 HC18 FALLEN DWN MORE THN ONCE

DISPLAY INSTRUCTIONS:

Display "last 12 months" in bold underlined text.

QUESTION TEXT:

In the last 12 months, {have you/has SP} fallen down more than one time?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HC19**hc1depresan1**

R1 HC19A SP LITTLE INTERST PLEAS

hc1depresan2

R1 HC19B SP DOWN DEPRES HOPELESS

hc1depresan3

R1 HC19C SP NERVOUS ANXIOUS

hc1depresan4

R1 HC19D SP UNABLE TO STOP WORRY

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at HC19a, do not display question text in brackets.
Otherwise, display question text in brackets..**QUESTION TEXT:**

SHOW CARD HC1

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

{variable text [a-d]}

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

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

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

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

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

HC2oPRE**HC2oPRE**

NOT ON FILE

QUESTION TEXT:

The next few questions are about how {you have/SP has} been sleeping.
PRESS 1 AND ENTER TO CONTINUE

HC2o**hc1aslep30mn**

R1 HC2o OVER 30 MIN FALL ASLEEP

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

SHOW CARD HC2

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

CODES

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

HC21**hc1trbfalbck**

R1 HC21 TROBLE FALLNG BCK ASLEEP

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

SHOW CARD HC3

(In the last month) on nights when {you/SP} woke up before {you/he/she} wanted to get up, how often did {you/he/she} have trouble falling back asleep? Would you say every night, most nights, some nights, rarely, or never?

CODES

- | | |
|---|-----------------------------|
| 1 | EVERY NIGHT |
| 2 | MOST NIGHTS |
| 3 | SOME NIGHTS |
| 4 | RARELY |
| 5 | NEVER |
| 7 | DON'T WAKE UP/NOT A PROBLEM |
| | REFUSED |
| | DON'T KNOW |
-

DISPLAY INSTRUCTIONS:

Display "last month" in bold underlined text.

QUESTION TEXT:

SHOW CARD HC3

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section HT – HOUSING TYPE

NHATS Round 1

Section HT [HOUSING TYPE]

Sequence: 4

HT1PRE

HT1PRE

NOT ON FILE

Now, let's talk about the place {you live/SP lives}.
PRESS 1 AND ENTER TO CONTINUE

HT1

ht1longlived

R1 HT1 HOW LONG LIVED THERE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

INDICATE RESPONSE UNIT

CODES

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

HT1A

ht1mthsived

R1 HT1A MNTHS IF LESS THAN 1 YR

QUESTION TEXT:

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

ENTER ZERO IF LESS THAN 1 MONTH

ENTER NUMBER

Range

0 to 11

PROGRAMMER INSTRUCTIONS:

Range 0-11

Go to Box HT3

HT1B

ht1yrsived

R1 HT1B YEARS LIVED AT ADDRESS

QUESTION TEXT:

ENTER NUMBER OF YEARS LIVED AT ADDRESS

ENTER NUMBER

Range

1 to 110

Soft Range

1 to 50

PROGRAMMER INSTRUCTIONS:

Hard range 1-110

Soft range 1-50

Go to Box HT3

HT2**ht1longer5yr**

R1 HT2 LIVED HERE 5 YRS OR LNGER

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

BOX HT3**BOXHT3**

NOT ON FILE

If RE1=1 (FREE STANDING) or RE1=2 (SINGLE HOME, ATTACHED),
go to HT3. Otherwise, go to HT4**HT3****ht1placedesc**

R1 HT3 PLACE BEST DESCRIPTION

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Show Card HT1

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

PRESS F1 FOR HELP SCREEN

CODES

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

HT3A**HT3A**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length 25

PROGRAMMER INSTRUCTIONS:

Text length 25 char

BOX HT3b**BOXHT3b**

NOT ON FILE

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

HT4**ht1retiresen**

R1 HT4 RETIRMNT CMMTY SEN HOUSIN

DISPLAY INSTRUCTIONS:

If RE1=1 (FREE-STANDING), display “a detached house”
If RE1=2 (SINGLE HOME, BUT ATTACHED), display “a row house, townhouse, or duplex”
If RE1=3 (MOBILE HOME OR TRAILER), display “a mobile home or trailer”
If RE1=4 (A MULTI-UNIT BUILDING), display “a multi-unit building”
If RE1=91(other) display “TEXT ENTERED IN RE1a”
If HT3=1(PRIVATE RESIDENCE), display “that is a private residence”
If HT3=2(GROUP HOME), display “that is a group home”
If HT3=3(ASSISTED LIVING), display “that is an assisted living facility or CCRC”
If HT3=4(RELIGIOUS GROUP QUARTERS), display “that is a religious group quarters”
If HT3=91(OTHER SPECIFY), display “that is a “TEXT ENTERED IN HT3a”

QUESTION TEXT:

I have recorded that {you live/SP lives} in {a detached house/a row house, townhouse, or duplex/a mobile home or trailer/a multi-unit building/OTHER} {that is {a private residence/a group home/an assisted living facility or CCRC/a religious group quarters/OTHER}}.

Is {your/{his/her}} home part of a retirement community or a senior housing community?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX HT5**BOXHT5**

NOT ON FILE

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

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

Else if RETIREMENT COMMUNITY flag = 1 , go to HT5

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

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

HT5**ht1diffareun****R1 HT5 DIFF AREAS UNITS TO MOVE****QUESTION TEXT:**

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

CODES

1	YES	BOX HT8
2	NO	
	REFUSED	
	DON'T KNOW	

HT6**ht1helpmedbdb****R1 HT6 HELP W MEDS BATH DRESSING****QUESTION TEXT:**

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

CODES

1	YES	BOX HT8
2	NO	
	REFUSED	
	DON'T KNOW	

HT7**ht1meals****R1 HT7 MEALS FOR RESIDENTS****QUESTION TEXT:**

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX HT8**BOXHT8****NOT ON FILE**

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

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

BOX HT9A**BOXHT9A**

NOT ON FILE

If Facility Task = code 20 (COMPLETED), use FACILITY NAME from FQ for facility name displays and go to HT10.
Else if preloaded IMS facility name field is not blank, go to
HT9a. Otherwise, go to HT9b.

HT9A**HT9A**

NOT ON FILE

QUESTION TEXT:

I have recorded {FACILITY NAME} as the name of the place where {you live/SP lives}. Is this correct?
IF PLACE NAME IS NOT DISPLAYED, ENTER 2.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

HT9B**HT9B**

NOT ON FILE

QUESTION TEXT:

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

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

Text length 50 char
Display FACILITY NAME from HT9b for facility name displays.

HT10**ht1spacename**

R1 HT10 NAME OF LIVING SPACE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

1	APARTMENT	BOX HT11
2	ROOM	BOX HT11
3	UNIT	BOX HT 11
4	SUITE	BOX HT 11
91	SOMETHING ELSE (SPECIFY)	

HT1oA**HT1oA**

NOT ON FILE

QUESTION TEXT:

SPECIFY NAME FOR PRIVATE LIVING SPACE

ENTER TEXT

Length 25

PROGRAMMER INSTRUCTIONS:

Text length 25 char

BOX HT11**BOXHT11**

NOT ON FILE

IF HT1o = 1 (APARTMENT), SET HOTYPE FLAG = 2, AND USE DISPLAY TEXT OF "Apartment".
ELSE IF HT1o= 2 (ROOM), SET HOTYPE FLAG = 3, AND USE DISPLAY TEXT OF "Room".
ELSE IF HT1o= 3 (UNIT), SET HOTYPE FLAG = 4, AND USE DISPLAY TEXT OF "Unit".
ELSE IF HT1o=4 (SUITE), SET HOTYPE flag =5, and use display text of "suite".
ELSE IF HT1o = 91 (OTHER), SET HOTYPE flag = 6, AND USE DISPLAY TEXT ENTERED AT HT1oA (OTHER).
ELSE SET HOTYPE FLAG = 1, AND USE DISPLAY TEXT OF "Home".
If FACILITY flag=1 (YES), go to Section SE – Service Environment
Otherwise, go to Section HH – Household and Family.

Flag variables set in HT Section

f1facility	R1 F ROUTING FLAG FROM HT3 5 6 7
f1hotype	R1 F HT TYPE OF HOME
f1retirecom	R1 F HT SP LIVES IN RETIREMT COM

NHATS Round 1

Section	SE	[SERVICE ENVIRONMENT]	Sequence: 5
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BOX SE1PRE	BOXSE1PRE	NOT ON FILE
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If (FACILITY flag = 1), go to SE1PRE.
Otherwise go to Section HH - Household.

SE1PRE	SE1PRE	NOT ON FILE
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DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

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

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

PRESS 1 AND ENTER TO CONTINUE.

BOX SE1	BOXSE1	NOT ON FILE
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If HT7 = 1 (YES, MEALS OFFERED), code SE1a = 1 (YES) and go to SE1b.
Otherwise, go to SE1a.

SE1	se1servcoff1	R1 SE1 FAC SERVICES MEALS
	se1servcoff2	R1 SE1 FAC SERVICES HELP W RX
	se1servcoff3	R1 SE1 FAC SERV HELP BATH DRESS
	se1servcoff4	R1 SE1 FAC SERVICES LAUNDRY
	se1servcoff5	R1 SE1 FAC SERVICES HOUSEKEEP
	se1servcoff6	R1 SE1 FAC SERV VAN TO DOCTOR
	se1servcoff7	R1 SE1 FAC SRV VAN TO STORE EVNT
	se1servcoff8	R1 SE1 FAC SERV RECREATIONAL FAC
	se1servcoff9	R1 SE1 FAC SERV SOCIAL EVENTS

DISPLAY INSTRUCTIONS:

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

Use "Same Question Stem" display.

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

QUESTION TEXT:

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

{variable text [a-i]}

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

RESPONSE[2] b. help with medications?

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

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

RESPONSE[5] e. housekeeping?

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

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

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

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX SE2**BOXSE2****NOT ON FILE**

If any item at SE1a-i = 1 (YES), go to SE2
Otherwise, go to Section HH - Household

SE2	se1servused1	R1 SE2 SERVS USED MEALS
	se1servused2	R1 SE2 SERVS USED HELP W RX
	se1servused3	R1 SE2 SERVS USED HLP BATH DRESS
	se1servused4	R1 SE2 SERVS USED LAUNDRY
	se1servused5	R1 SE2 SERVS USED HOUSEKEEPING
	se1servused6	R1 SE2 SERVS USED VAN TO DOCTOR
	se1servused7	R1 SE2 SERVS USED VAN TO STORE
	se1servused8	R1 SE2 SERVS USED RECREATION FAC
	se1servused9	R1 SE2 SERVS USED SOCIAL EVENTS

DISPLAY INSTRUCTIONS:

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

If SE1a = 1 (YES), display SE2a.
 If SE1b = 1 (YES), display SE2b.
 If SE1c = 1 (YES), display SE2c.
 If SE1d = 1 (YES), display SE2d.
 If SE1e = 1 (YES), display SE2e.
 If SE1f = 1 (YES), display SE2f.
 If SE1g = 1 (YES), display SE2g.
 If SE1h = 1 (YES), display SE2h.
 If SE1i = 1 (YES), display SE2i.

Use "Same Question Stem" display

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

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

QUESTION TEXT:

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

{variable text [a-i]}

RESPONSE [1] a. meals (in a common dining areas or in {your/SP's} own room)?
 RESPONSE [2] b. help with medications?
 RESPONSE [3] c. help with bathing or dressing?
 RESPONSE [4] d. laundry services for linens or clothing?
 RESPONSE [5] e. housekeeping?
 RESPONSE [6] f. a van or shuttle to doctors or other medical providers?
 RESPONSE [7] g. a van or shuttle to stores or events like concerts?
 RESPONSE [8] h. recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
 RESPONSE [9] i. organized social events and activities?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX SE3**BOXSE3****NOT ON FILE**

In any item at SE2a-i= 1 (YES), go to SE3.
Otherwise, go to Section HH - Household.

SE3**se1payservi1**

R1 SE3 PAYMENT FOR SERV MEALS

se1payservi2

R1 SE3 PAYMENT FOR SERV HLP W RX

se1payservi3

R1 SE3 PAY FR SERV HLP BATH DRSS

se1payservi4

R1 SE3 PAYMENT FOR SERV LAUNDRY

se1payservi5

R1 SE3 PAYMNT FOR SERV HOUSEKEEP

se1payservi6

R1 SE3 PAYMNT FR SERV VAN TO DOC

se1payservi7

R1 SE3 PAY FOR SERV VAN TO STORE

se1payservi8

R1 SE3 PAY FOR SERV RECREATION

se1payservi9

R1 SE3 PAY FOR SERV SOCIAL EVNTS

DISPLAY INSTRUCTIONS:

If SE2a = 1 (YES), display SE3a.

If SE2b = 1 (YES), display SE3b.

If SE2c = 1 (YES), display SE3c.

If SE2d = 1 (YES), display SE3d.

If SE2e = 1 (YES), display SE3e.

If SE2f = 1 (YES), display SE3f.

If SE2g = 1 (YES), display SE3g.

If SE2h = 1 (YES), display SE3h.

If SE2i = 1 (YES), display SE3i.

Use "Same Question Stem" display.

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

Otherwise display question text in brackets.

QUESTION TEXT:

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

{variable text [a -i]}

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

RESPONSE [2] b. help with medications?

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

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

RESPONSE [5] e. housekeeping?

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

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

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

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

Go to Section HH- Household.

NHATS Round 1

Section HH [HOUSEHOLD]

Sequence: 6

HH1PRE

HH1PRE

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HH1

hh1martlstat

R1 HH1 MARITAL STATUS

DISPLAY INSTRUCTIONS:

Display “currently” in underlined text.

QUESTION TEXT:

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

CODES

1	MARRIED	HH3
2	LIVING WITH A PARTNER	HH3
3	SEPARATED	BOX HH13
4	DIVORCED	
5	WIDOWED	
6	NEVER MARRIED	BOX HH13
	REFUSED	BOX HH13
	DON'T KNOW	BOX HH13

PROGRAMMER INSTRUCTIONS:

Write Marital Status for SP to PERSON ROSTER.

HH2A

hh1mthendmar (Sensitive)

R1 HH2A MTH MARR END OR SPS PAS

DISPLAY INSTRUCTIONS:

If HH1=4 (DIVORCED), display “[your/SP's] (most recent) marriage end”. If HH1=5 (WIDOWED), display, “[your/SP's] spouse pass away”.

Display “month” in underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 12

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH2B**hh1yrendmarr****R1 HH2B YR MARR END OR SPS PASS****DISPLAY INSTRUCTIONS:**

If HH1=4 (DIVORCED), display “{your/SP’s}(most recent) marriage end”.
 If HH1=5 (WIDOWED), display, “{your/SP’s} spouse pass away”.
 Display “4-digit year” in underlined text.

QUESTION TEXT:

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

ENTER 4-DIGIT YEAR

ENTER NUMBER

REFUSED
DON’T KNOW

BOX HH13
BOX HH13

PROGRAMMER INSTRUCTIONS:

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

All responses skip to Box HH13

HH3**hh1yrsmarliv****R1 HH3 YEARS MARR OR LIV TOGTEHR****DISPLAY INSTRUCTIONS:**

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and HH1=1 (MARRIED), display “have you, “and {SP}”, and “been married”.
 Else if PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER) and HH1=2 (LIVING WITH A PARTNER), display “have you”, “and {SP}” and “lived together”.
 Else if PROXY flag=1 (YES) and HH1=1 (MARRIED), display “has {SP}” and “been married”.
 Else if PROXY flag=1 (YES) and HH1=2 (LIVING WITH A PARTNER), display “have {SP}”, “and {his/her} partner”, and “lived together”.
 Else If HH1=1 (MARRIED), display “have you” and “been married”.
 Else if HH1=2 (LIVING WITH A PARTNER), display “have you”, “and your partner” and “lived together”.

QUESTION TEXT:

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

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

ENTER NUMBER

Range
Soft Range
REFUSED
DON’T KNOW

0 to 80
0 to 60

PROGRAMMER INSTRUCTIONS:

Hard range 0-80

Soft range 0-60

BOX HH4A**BOXHH4A**

NOT ON FILE

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), set SPOUSE/PARTNER flag=1 FOR PERSON, and go to HH6a.
Otherwise, go to HH4a.

HH4A**HH4A**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If HH1=1 (MARRIED), display "spouse".
If HH1=2 (LIVING WITH A PARTNER), display "partner".

Display "FIRST" in bold underlined text.

QUESTION TEXT:

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

ENTER FIRST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

HH4a, HH4b, and HH4c are displayed on the same screen.

HH4B**HH4B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "MIDDLE" in bold underlined text.

QUESTION TEXT:

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

ENTER MIDDLE NAME. CONFIRM SPELLING

PRESS ENTER IF NO MIDDLE NAME OR INITIAL

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

HH4a, HH4b, and HH4c are displayed on the same screen.
Allow empty.

HH4C**op1relatnshp**

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.

QUESTION TEXT:

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

ENTER LAST NAME. CONFIRM SPELLING

ENTER TEXT

Length

25

PROGRAMMER INSTRUCTIONS:

HH4a, HH4b, and HH4c are displayed on the same screen.

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

HH5**hh1spgender**

R1 HH5 GENDER OF SPOUSE

op1gender

R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

If HH1=1 (MARRIED), display "spouse".

If HH1=2 (LIVING WITH A PARTNER), display "partner".

QUESTION TEXT:

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

CODES

1	MALE
2	FEMALE

PROGRAMMER INSTRUCTIONS:

Write SPOUSE/PARTNER gender from HH5 to PERSON ROSTER.

HH6A**hh1modob (Sensitive)**

R1 HH6A MONTH DOB OF SPOUSE

op1birthmth (Sensitive)

R1 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

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

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

Display HH6a, HH6b, and HH6c on the same screen.

Display "month" as underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 12

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH6B

hh1daydob (Restricted)

R1 HH6B DAY DOB OF SPOUSE

DISPLAY INSTRUCTIONS:

If PROXY flag=1 (YES) and PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display “your”.
Otherwise, display “[SPOUSE/PARTNER FIRST NAME LAST NAME]’s”.
Display HH6a, 6b, and 6c, on the same screen.

Display “day” as underlined text.

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 31

PROGRAMMER INSTRUCTIONS:

Hard range 1-31

HH6C

hh1yrdob (Sensitive)

R1 HH6C YEAR DOB OF SPOUSE

op1birthyear (Sensitive)

R1 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

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

Display HH6a, 6b, and 6c, on the same screen.

Display “year” as underlined text.

QUESTION TEXT:

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

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: CURRENT YEAR – 110.

If HH6a ≥ 1 and HH6b ≥ 1 and HH6c ≥ 1, compute PERSON AGE as (CURRENT DATE - HH6a-c DOB) and prefill HH7.

Otherwise, go to HH8.

HH7**hh1dspousage (Sensitive)**

R1 D SPOUSE AGE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

If HH7 = in (1 (yes), DK, RF) write PERSON AGE to PERSON ROSTER.

HH8**hh1dspousage (Sensitive)**

R1 D SPOUSE AGE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

ENTER AGE

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Hard range: 18-110. Soft range: 55-99.

Write SPOUSE/PROXY age to PERSON ROSTER.

If HH8 = DK or RF, display “DK” or “RF” in matrix age field.

HH9**hh1spouseduc**

R1 HH9 HIGHEST EDUC OF SPOUSE

op1leveledu

R1 OP HIGHEST LEVEL EDUCATION

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOWCARD HH1

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Write education level to PERSON ROSTER.
If HH9 = DK or RF, display “DK” or “RF” in matrix education field.

HH10**hh1spoupchlp**

R1 HH10 SPOUS NEED PERS CARE HLP

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HH11**hh1livwthspo**

R1 HH11 LIVE WITH SPOUSE PARTNER

op1prsninhh

R1 OTHER PRSN IN HOUSEHOLD

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

1	YES	BOX HH13
2	NO	
	REFUSED	BOX HH13
	DON'T KNOW	BOX HH13

PROGRAMMER INSTRUCTIONS:

If HH11=1 (YES), set INHOUSEHOLD flag = 1 (YES) for SPOUSE/PARTNER.

HH12**hh1placekind**

R1 HH12 KIND OF PLACE LIVE IN

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOWCARD HH2

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

PRESS F1 FOR HELP SCREEN

CODES

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

HH12A**HH12A**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length

50

BOX HH13**BOXHH13**

NOT ON FILE

If FACILITY flag = 1 (yes), go to Section CS.
Else if If PROXY flag=1 and PROXY RELATIONSHIP=35, go to HH13b.
Else if PROXY flag=1 and PROXY RELATIONSHIP =3-34, 91, or 92, go to HH13a. Otherwise, go to HH13b.

HH13a**hh1proxlivsp**

R1 HH13A PROXY LIVES W SP

op1prsninhh

R1 OTHER PRSN IN HOUSEHOLD

QUESTION TEXT:

Do you live here with {SP}?

CODES

1	YES
2	NO

PROGRAMMER INSTRUCTIONS:

If HH13a=1 (YES), set INHOUSEHOLD flag=1 (YES) for PROXY PERSON.

HH13b**hh1othlvhere**

R1 HH13B ANYONE ELSE LIVE HERE

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

CODES

1	YES
---	-----

2	NO	SECTION CS
	REFUSED	SECTION CS
	DON'T KNOW	SECTION CS

HH14

op1prsninhh

R1 OTHER PRSN IN HOUSEHOLD

DISPLAY INSTRUCTIONS:

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

Display questions HH14-HH19 on full matrix screen.

If INHOUSEHOLD flag = 1 (yes) for PROXY PERSON, display "you and {SP}".

Else if PROXY flag=2 (NO), display "you"

Otherwise, display "{SP}".

If at HH14a-b, do not display question text in brackets during first entry to person roster.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}Please tell me the names of all of the people who usually live (here) with {you and {SP}/you/{SP}}. Please include people temporarily absent.{[]}

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

PRESS 1 and ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

Display grid with SP preloaded, and Proxy preloaded if INHOUSEHOLD flag= 1 (YES) for PROXY PERSON.
For each HHMEMBER ROSTER addition, set INHOUSEHOLD flag= 1 (YES).

Allow up to 15 row entries.

Allow movement between grid items using the arrow keys.

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

Text field is 25 char for each name field.

Go to HH20 when matrix is complete

HH14A

HH14A

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "first" in underlined text

QUESTION TEXT:

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

CONFIRM SPELLING

PRESS ENTER IF MATRIX IS COMPLETE

ENTER TEXT

Length

25

HH14B**HH14B**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "last" in underlined text

QUESTION TEXT:

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

CONFIRM SPELLING

ENTER TEXTLength 25

HH15**op1relatnshp**

R1 OTHR PRSN RELATIONSHIP TO SP

op1childinhh

R1 HH15 CHILD IN HOUSEHOLD

op1gender

R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

Display HOUSEHOLD RELATIONSHIP CODE LIST.

QUESTION TEXT:

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

PRESS F1 FOR HELP SCREEN

CODES

- | | |
|----|-----------------------------|
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |
| 11 | SISTER-IN-LAW |
| 12 | BROTHER-IN-LAW |
| 13 | MOTHER |
| 14 | STEPSISTER |
| 15 | MOTHER-IN-LAW |
| 16 | FATHER |
| 17 | STEPFATHER |
| 18 | FATHER-IN-LAW |
| 19 | GRANDDAUGHTER |
| 20 | GRANDSON |
| 21 | NIECE |
| 22 | NEPHEW |
| 23 | AUNT |
| 24 | UNCLE |
| 25 | COUSIN |
| 26 | STEPDAUGHTER'S SON/DAUGHTER |
| 27 | STEPSON'S SON/DAUGHTER |

28 DAUGHTER-IN-LAW'S SON/DAUGHTER
29 SON-IN-LAW'S SON/DAUGHTER
30 BOARDER/RENTER
31 PAID AIDE/HOUSEKEEPER/EMPLOYEE
32 ROOMMATE
33 EX-WIFE/EX-HUSBAND
34 BOYFRIEND/GIRLFRIEND
36 FRIEND
91 OTHER RELATIVE
92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

If HH15 = 3 (daughter), 5 (daughter-in-law), 7 (stepdaughter), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt), set PERSON GENDER = 2 (female) and go to HH17a.
ELSE If HH15 = 4 (son), 6 (son-in-law), 8 (stepson), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle), set PERSON GENDER = 1 (male) and go to HH17a.
Otherwise, go to HH16.
If HH15 = 3 (daughter), 4 (son), 7 (stepdaughter), or 8 (stepson), set CHILDINHH flag = 1 (yes) for ROSTER PERSON

HH16

op1gender

R1 OTHER PERSON GENDER

QUESTION TEXT:

Is {FIRST NAME LAST NAME} male or female?

CODES

1 MALE
2 FEMALE

PROGRAMMER INSTRUCTIONS:

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

BOX HH17

BOXHH17

NOT ON FILE

If HH15 = 25-36, 91 or 92, set HH17a-c, HH18, and HH19 as NOT REQUIRED and go to HH14a. Otherwise, go to HH17a.

HH17A

op1birthmth (Sensitive)

R1 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

Display HH17a, 17b, and 17c, on the same screen.
Display "month" as underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range 1 to 12
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range 1-12

HH17B**op1birthday (Sensitive)**

R1 OTHER PERSON DAY OF BIRTH

DISPLAY INSTRUCTIONS:

Display HH17a, 17b, and 17c, on the same screen.
Display "day" as underlined text.

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBER

Range 1 to 31
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range 1-31

HH17C**op1birthyear**

R1 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

Display HH17a, 17b, and 17c, on the same screen.
Display "year" as underlined text.

QUESTION TEXT:

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

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range: CURRENT YEAR - 110.
If HH17a > 1 and HH17b > 1 and HH17c > 1, compute PERSON AGE as (CURRENT DATE - HH17a-c DOB) and prefill HH18.
Otherwise, go to HH19.

HH18**HH18**

NOT ON FILE

QUESTION TEXT:

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

CODES

1	YES	HH14
2	NO	HH17
	REFUSED	HH14
	DON'T KNOW	HH14

PROGRAMMER INSTRUCTIONS:

If HH18 = 1 (yes), write HHMEMBER AGE to PERSON ROSTER.
If HH18 = DK or RF, display "DK" or "RF" in matrix age field.

HH19**HH19**

NOT ON FILE

QUESTION TEXT:

How old is {FIRSTNAME LASTNAME}?

ENTER AGE
IF LESS THAN 1 YEAR, ENTER 0

ENTER NUMBER

Range	0 to 110
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Numeric field range: 0-110.
Write PERSON AGE to PERSON ROSTER.

If HH19 = DK or RF, display "DK" or "RF" in matrix age field.
Go to HH14.

HH20**HH20**

NOT ON FILE

QUESTION TEXT:

IS THE HOUSEHOLD MATRIX COMPLETE?

CODES

1	YES	SECTION CS
2	NO	HH14

Derived Variables from Items in the HH Section

hh1dspouseid	R1 D SPOUSE ID
hh1dlvngarrg	R1 D LIVING ARRANGEMENT
hh1dspousage	R1 D SPOUSE AGE
hh1dhshldnum	R1 D TOTAL NUMBER IN HOUSEHOLD
hh1dhshldchd	R1 D TOTAL CHILDREN IN HOUSEHOLD

NHATS Round 1

Section CS [CHILDREN AND SIBLINGS] Sequence: 7

CS1

cs1dreconcil

R1 D CS1 OP RECORD RECONCILE

DISPLAY INSTRUCTIONS:

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

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

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

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

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

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

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

QUESTION TEXT:

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

CODES

1	YES	CS2PRE
2	NO	
	REFUSED	
	DON'T KNOW	

BOX CS2

BOXCS2

NOT ON FILE

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

If any roster entries with CHILDINHH flag = 1 (yes), go to CS9PRE.

Otherwise, go to CS14.

DISPLAY INSTRUCTIONS:

Display CHILDREN ROSTER as a grid.

Display questions CS2-CS7b on full matrix screen.

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

Display "first" as underlined text.

QUESTION TEXT:

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

What is (his/her) first name?

CONFIRM SPELLING

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

PRESS ENTER IF MATRIX IS COMPLETE

PROGRAMMER INSTRUCTIONS:

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

Allow up to 15 row entries.

Allow movement between grid items using the arrow keys.

Go to CS8 when matrix is complete.

DISPLAY INSTRUCTIONS:

Display "first" in underlined text.

QUESTION TEXT:

What is (his/her) first name?

CONFIRM SPELLING

ENTER TEXT

Length

25

DISPLAY INSTRUCTIONS:

Display "last" in underlined text.

QUESTION TEXT:

What is (his/her) last name?

CONFIRM SPELLING

ENTER TEXT

Length 25

CS3

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

op1gender

R1 OTHER PERSON GENDER

DISPLAY INSTRUCTIONS:

Display CHILD RELATIONSHIP CODE LIST.

QUESTION TEXT:

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

PRESS F1 FOR HELP SCREEN

CODES

3	DAUGHTER
4	SON
7	STEPDAUGHTER
8	STEPSON

PROGRAMMER INSTRUCTIONS:

If CS3 = 3 (daughter) or 7 (stepdaughter), set PERSON GENDER = 2 (female), and display "F" in matrix gender field.

ELSE set PERSON GENDER = 1 (male), and display "M" in matrix gender field.

CS4A

op1birthmth (Sensitive)

R1 OTHER PERSON MONTH OF BIRTH

DISPLAY INSTRUCTIONS:

Display "month" as underlined text.

QUESTION TEXT:

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

ENTER MONTH

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 12

CS4B

CS4B

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

Display "day" as underlined text

QUESTION TEXT:

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

ENTER DAY

ENTER NUMBERRange
REFUSED
DON'T KNOW

1 to 31

CS4C**op1birthyear (Sensitive)**

R1 OTHER PERSON YEAR OF BIRTH

DISPLAY INSTRUCTIONS:

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

Display "year" as underlined text.

QUESTION TEXT:

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

ENTER YEAR

ENTER NUMBERREFUSED
DON'T KNOW**PROGRAMMER INSTRUCTIONS:**

Hard range: CURRENT YEAR - 95.

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

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

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

CS5**op1age (Sensitive)**

R1 OTHER PERSON AGE

op1dage

R1 D OTH PERSN CAT AGE AT INTVW

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

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

CS6

op1age (Sensitive)

op1dage

R1 OTHER PERSON AGE

R1 D OTH PERSN CAT AGE AT INTVW

QUESTION TEXT:

How old is {FIRSTNAME LASTNAME}?

ENTER AGE

IF LESS THAN 1 YEAR, ENTER 0

ENTER NUMBER

Range
Soft Range
REFUSED
DON'T KNOW

0 to 95

15 to 75

PROGRAMMER INSTRUCTIONS:

Write PERSON AGE to PERSON ROSTER.

If CS6 = DK or RF, display "DK" or "RF" in matrix age field.

CS7A

op1cityres (Restricted)

R1 OTHER PRSN CITY OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display "CITY" in underlined text.

Display CS7a and CS7b on the same screen.

QUESTION TEXT:

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

ENTER CITY.

CONFIRM SPELLING

ENTER TEXT

Length
REFUSED
DON'T KNOW

25

CS7B

op1stateres (Restricted)

R1 OTHER PRSN STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display CS7a and CS7b on the same screen.

QUESTION TEXT:

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

ENTER STATE

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

ENTER TEXT

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use lookup file of state names.
Write PERSON CITY and STATE to PERSON ROSTER.
Go to CS2.

CS8**CS8**

NOT ON FILE

QUESTION TEXT:

IS THE CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS2

CS9PRE**CS9PRE**

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

CS9**op1leveledu**

R1 OP HIGHEST LEVEL EDUCATION

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

SHOWCARD CS1

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

CODES

- 1 NO SCHOOLING COMPLETED
 - 2 1ST-8TH GRADE
 - 3 9TH-12TH GRADE (NO DIPLOMA)
 - 4 HIGH SCHOOL GRADUATE (HIGH SCHOOL DIPLOMA OR EQUIVALENT)
 - 5 VOCATIONAL, TECHNICAL, BUSINESS, OR TRADE SCHOOL CERTIFICATE OR DIPLOMA (BEYOND HIGH SCHOOL LEVEL)
 - 6 SOME COLLEGE BUT NO DEGREE
 - 7 ASSOCIATE'S DEGREE
 - 8 BACHELOR'S DEGREE
 - 9 MASTER'S, PROFESSIONAL, OR DOCTORAL DEGREE
-

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Display grid with FIRSTNAME LASTNAME of roster entries with CHILDINHH flag = 1 (yes) or CHILDNOTINHH flag = 1 (yes) preloaded.

Allow movement between grid items using the arrow keys.

When exiting matrix, if any blank fields in matrix CS2-CS7b, or matrix CS9-CS12, return cursor to the blank field and display appropriate error message.

Go to CS13 when matrix is complete.

Write education level to PERSON ROSTER.

Display the following in the matrix education field for CS9 response values: 1: "NONE", 2: "PRE-8TH", 3: "9TH-12TH", 4: "HS GRAD", 5: "VOC/TECH", 6: "SOME COLL", 7: "AA", 8: "BA", 9: "POSTGRAD", DK: "DK", RF: "RF".

CS10

op1martlstat

R1 OTHER PERSON MARITAL STATUS

QUESTION TEXT:

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

CODES

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

PROGRAMMER INSTRUCTIONS:

Write Marital Status to PERSON ROSTER.

CS11

op1numchldrн

R1 OTHER PRSN NUMBER OF CHILDREN

QUESTION TEXT:

How many living children does {FIRSTNAME LASTNAME} have?

IF NEEDED: Include step and adopted children.

ENTER NUMBER OF CHILDREN

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

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

Write number of children to PERSON ROSTER.

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

CS12**op1anychdu18**

R1 OTH PRS ANY CHILDREN UNDER 18

QUESTION TEXT:

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

CODES

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

CS12a**op1numchdu18**

R1 OTH PR NUMBER OF CHILDREN U18

QUESTION TEXT:

How many children are under age 18?

ENTER NUMBER

Range	1 to 20
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write number of children under 18 to PERSON ROSTER.

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

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

Go to CS9.

CS13**CS13**

NOT ON FILE

QUESTION TEXT:

IS THE CHILDREN MATRIX COMPLETE?

CODES

1	YES	
2	NO	CS2

CS14**cs1sistrsnum**

R1 CS14 NUMBER OF LIVING SISTERS

QUESTION TEXT:

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

ENTER NUMBER OF SISTERS

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Hard Range: 0-20.

Soft range: 0-10.

CS15

cs1brthrsnum

R1 CS15 NUMBER OF LIVNG BROTHERS

QUESTION TEXT:

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

ENTER NUMBER OF BROTHERS

ENTER NUMBER

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

PROGRAMMER INSTRUCTIONS:

Hard Range: 0-20.

Soft range: 0-10.

Go to Section SN – Social Network.

Derived Variables from Items in CS Section

op1dage	R1 D OTH PERSN CAT AGE AT INTVW
cs1dnumchild	R1 D NUMBER OF CHILDREN
cs1dnmstpchd	R1 D NUMBER OF STEP CHILDREN
cs1dnumdaugh	R1 D NUMBER OF DAUGHTERS
cs1dnumson	R1 D NUMBER OF SONS
cs1dreconcil	R1 D CS1 OP RECORD RECONCILE

NHATS Round 1

Section	SN	[SOCIAL NETWORK]	Sequence: 8
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BOX SN1	BOXSN1	NOT ON FILE
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If PROXY flag=1 (YES), go to Section HO – Home Environment.
Otherwise, go to SN1PRE

SN1PRE	SN1PRE	NOT ON FILE
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QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

SN2	op1soclntrwk	R1 SN2 PART OF SP SOCIAL NETWORK
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DISPLAY INSTRUCTIONS:

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

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

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

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

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

QUESTION TEXT:

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

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

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

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

SELECT ALL THAT APPLY

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

PROGRAMMER INSTRUCTIONS:

Allow up to 5 selections to PERSON ROSTER. SET SOCIAL NETWORK ORDER flag 1-5 in order selected/added.

Display "CTRL/S" in red bolded font.

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

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

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

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

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

SN3**SN3**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display SN3 and SN4 on same page.

Display “first” as underline text.

QUESTION TEXT:

[What is (his/her) first name?]

CONFIRM SPELLING

ENTER TEXT

Length

25

SN4**SN4**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display SN3 and SN4 on same page.

Display “last” as underlined text.

QUESTION TEXT:

[What is (his/her) last name?]

CONFIRM SPELLING

ENTER TEXT

Length

25

SN5**op1relatnshp**

R1 OTHR PRSN RELATIONSHIP TO SP

op1gender

R1 OTHER PERSON GENDER

QUESTION TEXT:

[What is {FIRSTNAME LASTNAME}’s relationship to you?]

PRESS F1 FOR HELP SCREEN

CODES

5	DAUGHTER-IN-LAW
6	SON-IN-LAW
9	SISTER

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

PROGRAMMER INSTRUCTIONS:

For each addition to the PERSON ROSTER:

If 5 (daughter-in-law), 9 (sister), 11 (sister-in-law), 13 (mother), 14 (stepmother), 15 (mother-in-law), 19 (granddaughter), 21 (niece), or 23 (aunt) selected, set PERSON GENDER = 2 (female) and display SN7-SN8b for each.

Else if 6 (son-in-law), 10 (brother), 12 (brother-in-law), 16 (father), 17 (stepfather), 18 (father-in-law), 20 (grandson), 22 (nephew), or 24 (uncle) selected, set PERSON GENDER = 1 (male) and display SN7-SN8b for each.

Otherwise, display SN6-SN8b for each.

NOTE: persons with relationship codes 2,3 and 4 will have been written to the roster in HH and CS.

SN6

op1gender

R1 OTHER PERSON GENDER

QUESTION TEXT:

IF NOT OBVIOUS, ASK:

Is {FIRST NAME LAST NAME} male or female?

CODES

- | | |
|---|------------|
| 1 | MALE |
| 2 | FEMALE |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Write PERSON GENDER to PERSON ROSTER.

SN7**op1catgryage (Sensitive)**

R1 OTH PRSN SN CAT AGE

op1dcatgryag

R1 D OTH PRSN SN CAT AGE

QUESTION TEXT:

How old is {FIRST NAME LAST NAME}?

CODES

- | | |
|----|------------|
| 1 | UNDER 20 |
| 2 | 20-24 |
| 3 | 25-29 |
| 4 | 30-34 |
| 5 | 35-39 |
| 6 | 40-44 |
| 7 | 45-49 |
| 8 | 50-54 |
| 9 | 55-59 |
| 10 | 60-65 |
| 11 | 66-69 |
| 12 | 70-74 |
| 13 | 75-79 |
| 14 | 80-85 |
| 15 | 86-89 |
| 16 | 90-94 |
| 17 | 95-99 |
| 18 | 100+ |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Write PERSON CATEGORICAL AGE to PERSON ROSTER.

SN8A**op1cityres (Restricted)**

R1 OTHR PRSN CITY OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display SN8a and 8b on the same screen.

Display "city" as underlined text.

QUESTION TEXT:

Where does {FIRST NAME LAST NAME} live?

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

CONFIRM SPELLING

ENTER TEXT

Length

25

SN8B**op1stateres (Restricted)**

R1 OTHR PRSN STATE OF RESIDENCE

DISPLAY INSTRUCTIONS:

Display SN8a and 8b the same screen.
Display “state” as underlined text.

QUESTION TEXT:

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

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

Use lookup file of state names
Display state name response label.

Write PERSON CITY and STATE to PERSON ROSTER.

Go to Section HO – Home Environment.

Derived Variables from Items in the SN Section

sn1dnumsn	R1 D NUMBER IN SOCIAL NETWORK
op1dcatgryag	R1 D OTH PERSN SN CAT AGE
op1dsocwrkfl	R1 D LIKELY SOCIAL NETWRK MEMBER

Flag variables set in SN Section

f11noonetalk	R1 F SN SP HAS NO ONE TO TALK TO
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NHATS Round 1

Section HO [HOME ENVIRONMENT]

Sequence: 9

HO1PRE

HO1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HO1

ho1entrstair

R1 HO1 ENTRANCE STAIRS OUTSIDE

QUESTION TEXT:

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

CODES

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

BOX HO2

BOXHO2

NOT ON FILE

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

HO2

ho1entrccomm

R1 HO2 ENTRANCE COMMON OR PRIVAT

QUESTION TEXT:

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

CODES

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

HO3

ho1entrnramp

R1 HO3 RAMP AT ENTRANCE

QUESTION TEXT:

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

CODES

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

BOX HO4

BOXHO4

NOT ON FILE

If STRUCTURE flag = 2 (multi-unit) and RE2= 2 (multiple floors), then go to HO4, variable text [a].
If STRUCTURE flag = 2 (multi-unit) and RE2=1 (single floor), then go to HO4, variable text [c].
Otherwise, go to BOX HO5.

HO4

ho1bldgamen1
ho1bldgamen2
ho1bldgamen3
ho1bldgamen4

R1 HO4A BUILDING HAS ELEVATOR
R1 HO4B BUILDNG STAIR LIFT GLIDE
R1 HO4C BUILD COMMN SPACE MEALS
R1 HO4D BUILD SPACE SOCIAL EVENT

DISPLAY INSTRUCTIONS:

If at HO4a do not display brackets in question text.
If at HO4c and RE2 = 1 (single floor), do not display brackets in question text.
Otherwise, display brackets.

Use "Same Question Stem" display

QUESTION TEXT:

{[Does the building that {you live/SP lives} in have{]}
{variable text [a-d]}

RESPONSE [1] a. an elevator?
RESPONSE [2] b. a stair lift or stair glide?
RESPONSE [3] c. common or shared spaces that are used for meals?
RESPONSE [4] d. common or shared spaces that can be used for socializing?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX HO5**BOXHO5****NOT ON FILE**

If STRUCTURE flag = 2 (multi-unit) or RE1 = 3 (mobile home), go to HO10PRE.

Otherwise, go to HO5.

HO5**ho1levelsflr****R1 HO5 NUMBR OF LEVELS OR FLOORS****QUESTION TEXT:**

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

HO8**ho1homeamen1****R1 Ho8A BED KITCHN BATH SAME FLR****ho1homeamen2****R1 Ho8B HOME HAS ELEVATOR****ho1homeamen3****R1 Ho8C HOME HAS STAIR LFT GLIDE****DISPLAY INSTRUCTIONS:**

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

Use "Same Question Stem" display

QUESTION TEXT:

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

{variable text [a-c]}

RESPONSE [1] a. a bedroom, kitchen, and full bathroom with a shower or tub on the same floor?
RESPONSE [2] b. an elevator?
RESPONSE [3] c. a stair lift or stair glide?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

HO1oPRE

HO1oPRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If HOTYPE flag = 1 (HOME), display "home".
Else if HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT1oA (OTHER)".

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

BOX HO1o

BOXHO1o

NOT ON FILE

If FACILITY flag = 1, go to HO1o.
Otherwise, go to HO11.

HO1o

ho1bathprivt

R1 Ho1o PRIVATE BATH

DISPLAY INSTRUCTIONS:

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT1oA (OTHER)".

QUESTION TEXT:

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

CODES

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

HO11

ho1bathamen1

R1 Ho11A BATH HAS BATHTUB

ho1bathamen2

R1 Ho11B BATH HAS SHOWER STALL

ho1bathamen3

R1 Ho11C BATH GRAB BAR IN SHOWER

ho1bathamen4

R1 Ho11D BATH SEAT FR SHOWER TUB

ho1bathamen5

R1 Ho11E BATH RAISED TOILET SEAT

ho1bathamen6

R1 Ho11F BATH GRAB BARS TOILET

ho1bathamen7

R1 Ho11G BATH MED EMERGNCY SYSTM

DISPLAY INSTRUCTIONS:

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

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

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

Use "Same Question Stem" display

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

Otherwise, display question text in brackets.

For HO11b:

If HO11a = 1 (yes), display “separate from the tub”.

Otherwise, use null display.

For HO11c and HO11d:

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

If HO11a= 2 (no bathtub) and HO11b = 1 (yes, shower stall), display “shower”

If HO11a = 1 (yes, bathtub) and HO11b = 2 (no shower stall), display “tub area”

If HO11a = 1 (yes, bathtub) and HO11b = 1(yes, shower stall), display “shower or tub area”

QUESTION TEXT:

{[{}Whether or not {you use/SP uses} it, does {the bathroom in {your /{his/her}} {apartment/unit/suite/room/other}}/{your/{his/her}} bathroom/{your/{his/her}} home } have{[]}}

{variable text [a-g]}

RESPONSE [1] a. a bathtub?

RESPONSE [2] b. a shower stall {separate from the tub}?

RESPONSE [3] c. a grab bar in the {shower/tub area/shower or tub area}?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

RESPONSE [4] d. a seat for the {shower/tub/shower or tub}?

IF NEEDED: This includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

RESPONSE [5] e. a raised toilet or raised toilet seat?

RESPONSE [6] f. grab bars around the toilet?

RESPONSE [7] g. a medical emergency system to call someone for help?

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

If HO11a=2 (no) and HO11b=2 (no) then set BATHGRABBAR flag=2, set BATHSEAT flag=2, and skip to HO11e.

If FACILITY flag = 1, go to HO12 after HO11f.

Otherwise, display [RESPONSE 7] and variable text {g}

IF HO11c=1 (yes), set BATHGRABBAR flag = 1 (yes)

IF HO11d=1 (yes), set BATHSEAT flag = 1 (yes)

IF HO11e=1 (yes), set RAISED TOILET flag = 1 (yes)

IF HO11f=1 (yes), set TOILETGRABBAR flag = 1 (yes)

BOX HO12**BOXHO12****NOT ON FILE**

IF FACILITY FLAG = 1 (YES), GO TO HO12.
ELSE GO TO HO14.

HO12**ho1kitchnprv****R1 HO12 PRIVATE KITCHEN****QUESTION TEXT:**

Does {your/SP's} {apartment/room/unit/suite/other} have a private kitchen or private kitchen area?

IF NEEDED: A private kitchen area is a place in your home where you can store food and prepare simple meals or snacks.

CODES

1	YES	HO14
2	NO	
	REFUSED	
	DON'T KNOW	

HO13**ho1kitchncom****R1 Ho13 COMMON KITCHEN****QUESTION TEXT:**

Is there a kitchen area in the building where people who live {here/where SP lives} can store food or prepare simple meals or snacks?

CODES

1	YES	SECTION EM
2	NO	SECTION EM
	REFUSED	SECTION EM
	DON'T KNOW	SECTION EM

HO14**ho1microwave****R1 HO14 USE OF MICROWAVE****QUESTION TEXT:**

(Whether or not {you use/SP uses} it,) does {your/SP's} kitchen have a working microwave?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section EM – Environmental Modifications.

Flag variables set in HO Section	
f1onefloor	R1 F HO SP LIVES ON ONE FLOOR
f1bathgrbbr	R1 F HO SPS BATH HAS GRAB BARS
f1bathseat	R1 F HO SPS BATH HAS SEAT
f1raisedtlt	R1 F HO SP HAS RAISED TOILET
f1tltgrbbr	R1 F HO SP TOLIET HAS GRAB BARS

National Study Round 1

Section EM [ENVIRONMENTAL MODIFICATIONS] Sequence: 10

BOX EM1

BOXEM1

NOT ON FILE

If (HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES, RAMP)) or HO8b=1 (YES, ELEVATOR) or HO8c=1 (YES, STAIRLIFT) or HO11c=1 (YES, SHOWER GRABBAR) or HO11d=1 (YES, SHOWER SEAT) or HO11e=1 (YES, RAISED TOILET SEAT) or HO11f=1 (YES, TOILET GRABBAR), go to EM1.

Otherwise, go to EM4.

EM1

em1modhere1

R1 EM1 ENVIRON MODS HERE OR ADD

DISPLAY INSTRUCTIONS:

If HO2<>1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display “a ramp”

If HO8b=1 (YES), display “an elevator”

If HO8c=1 (YES), display “a stair lift or stair glide”

If HO11c=1 (YES), display “a grab bar in the shower or tub area”

If HO11d=1 (YES), display “a seat for the shower or tub”

If HO11e=1 (YES), display “a raised toilet or raised toilet seat”

If HO11f=1 (YES), display “grab bars around the toilet”

If only one item listed, display “Was this item” and “it”

Otherwise, display “Were all these items” and “any of them”

QUESTION TEXT:

You told me that {you have/SP has}:

{a ramp}
{an elevator}
{a stair lift or stair glide}
{a grab bar in the shower or tub area}
{a seat for the shower or tub}
{a raised toilet or raised toilet seat}
{grab bars around the toilet}

{Was this item/Were all these items} here when {you/{he/she}} moved in or did {you{he/she}} add {it/any of them}?

CODES

1	ALL ITEMS HERE	EM4
2	ADDED ONE OR MORE ITEMS	
	REFUSED	EM4
	DON'T KNOW	EM4

EM2	em1addlstyr1	R1 EM2A RAMP ADDED IN LAST YR
	em1addlstyr2	R1 EM2B ELEVATOR ADDED IN LST YR
	em1addlstyr3	R1 EM2C STR LIFT ADDED IN LST YR
	em1addlstyr4	R1 EM2D SHWR GRABBAR ADD LST YR
	em1addlstyr5	R1 EM2E BATHSEAT ADDED IN LST YR
	em1addlstyr6	R1 EM2F TOILETSEAT ADD IN LST YR
	em1addlstyr7	R1 EM2G TOILET GRABBARS ADDED YR

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display

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

Otherwise, display question text in brackets.

If only one item listed at EM1, display “if this was”.

Otherwise, display “which of these were”.

If HO2 <> 1 (COMMON OR SHARED ENTRANCE) and HO3=1 (YES), display RESPONSE [1] and variable text {a}

If HO8b=1 (YES), display RESPONSE [2] and variable text {b}

If HO8c=1 (YES), display RESPONSE [3] and variable text {c}

If HO11c=1 (YES), display RESPONSE [4] and variable text {d}

If HO11d=1 (YES), display RESPONSE [5] and variable text {e}

If HO11e=1 (YES), display RESPONSE [6] and variable text {f}

If HO11f=1 (YES), display RESPONSE [7] and variable text {g}

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

QUESTION TEXT:

{[]}We'd like to know {if this was/which of these were} added in the last year, that is since {CURRENT MONTH, YEAR - 1 YEAR}. In the last year, did {you/SP} add the{[]}

{variable text [a-g]}

{RESPONSE [1] a. ramp?}

{RESPONSE [2] b. elevator?}

{RESPONSE [3] c. stair lift or stair glide?}

{RESPONSE [4] d. grab bar in the shower or tub area?}

{RESPONSE [5] e. seat for the shower or tub?}

{RESPONSE [6] f. raised toilet or raised toilet seat?}

{RESPONSE [7] g. grab bars around the toilet?}

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX EM3**BOXEM3****NOT ON FILE**

If EM2 a-g = 2 (NO), go to EM4.
Otherwise, go to EM3.

EM3

em1payyufam1
em1payyufam2
em1payyufam3
em1payyufam4
em1payyufam5
em1payyufam6
em1payyufam7

R1 EM3A SP PAID FOR RAMP
R1 EM3B SP PAID FOR ELEVATOR
R1 EM3C SP PAID STAIR LFT GLIDE
R1 EM3D SP PAID SHOWER GRABBAR
R1 EM3E SP PAID SHOWER SEAT
R1 EM3F SP PAID RAISD TOILT SEAT
R1 EM3G SP PAID TOILET GRABBARS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

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

Otherwise, display question text in brackets.

If EM2a = 1 (YES), display RESPONSE [1] and variable text {a}

If EM2b=1 (YES), display RESPONSE [2] and variable text {b}

If EM2c=1 (YES), display RESPONSE [3] and variable text {c}

If EM2d=1 (YES), display RESPONSE [4] and variable text {d}

If EM2e=1 (YES), display RESPONSE [5] and variable text {e}

If EM2f=1 (YES), display RESPONSE [6] and variable text {f}

If EM2g=1 (YES), display RESPONSE [7] and variable text {g}

QUESTION TEXT:

{[]Did {you/SP} or {your/{his/her}} family pay any of the cost of adding or getting the{[]}
{variable text [a-g]}
{RESPONSE [1] a. ramp?}
{RESPONSE [2] b. elevator?}
{RESPONSE [3] c. stair lift or stair glide?}
{RESPONSE [4] d. grab bar in the shower or tub area?}
{RESPONSE [5] e. seat for the shower or tub?}
{RESPONSE [6] f. raised toilet or raised toilet seat?}
{RESPONSE [7] g. grab bars around the toilet?}

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

EM4

em1paydevce1	R1 EM4A SP PAID FOR VISION AIDS
em1paydevce2	R1 EM4B SP PAID FOR HEARING AID
em1paydevce3	R1 EM4C SP PAID FOR CANE
em1paydevce4	R1 EM4D SP PAID FOR WALKER
em1paydevce5	R1 EM4E SP PAID FOR WHEELCHAIR
em1paydevce6	R1 EM4F SP PAID FOR SCOOTER
em1paydevce7	R1 EM4G SP PAID FOR GRABBER
em1paydevce8	R1 EM4H SP PD SPECIAL DRESS ITM
em1paydevce9	R1 EM4I SP PAID ADAPTED UTENSILS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at EM4a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display "pay anything for" in bold underlined text.

QUESTION TEXT:

{[]Here are a few other devices that help with daily activities. Whether or not {you use/SP uses} them now, in the last year, did {you/he/she} or {your/his/her} family pay anything for the following items for {you/him/her}?[]}

{variable text [a-i]}

RESPONSE [1] a. glasses or other vision aids such as a magnifying glass?

RESPONSE [2] b. a hearing aid?

RESPONSE [3] c. a cane?

RESPONSE [4] d. a walker?

RESPONSE [5] e. a wheelchair?

RESPONSE [6] f. a scooter?

RESPONSE [7] g. a reacher or grabber to pick up things more easily?

RESPONSE [8] h. special items to help with dressing, such as button hooks or clothes that are designed to get on and off easily?

RESPONSE [9] i. adapted utensils to help {you/SP} to eat or cut {your/his/her} food?

IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

CODES

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

PROGRAMMER INSTRUCTIONS:

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

BOX EM5**BOXEM5**

NOT ON FILE

If EM3a-g=1 (YES) or any of EM4a-i = 1 (YES), go to EM5.
Otherwise, go to Section CM-Community

EM5**em1payaltgth**

R1 EM5 PAY FOR THESE ALTOGETHER

DISPLAY INSTRUCTIONS:

If EM3a=1 (YES), display "ramp"
If EM3b=1 (YES), display "elevator"
If EM3c=1 (YES), display "stair lift or stair glide"
If EM3d=1 (YES), display "grab bar in the shower or tub area"
If EM3e=1 (YES), display "seat for the shower or tub"
If EM3f=1 (YES), display "raised toilet or raised toilet seat"
If EM3g=1 (YES), display "grab bars around the toilet"
If EM4a=1 (YES), display "glasses or other vision aids"
If EM4b=1 (YES), display "hearing aid"
If EM4c=1 (YES), display "cane"
If EM4d=1 (YES), display "walker"
If EM4e=1 (YES), display "wheelchair"
If EM4f=1 (YES), display "scooter"
If EM4g=1 (YES), display "reacher or grabber"
If EM4h=1 (YES), display "special items to help with dressing"
If EM4i=1(YES), display "adapted utensils"

If more than one item displayed, display commas between each one.

QUESTION TEXT:

Thinking about the {ramp} {elevator} {stair lift or stair glide} {grab bar in the shower or tub area} {seat for the shower or tub} {raised toilet or raised toilet seat} {grab bars around the toilet} {glasses or vision aids} {hearing aid} {cane} {walker} {wheelchair} {scooter} {reacher or grabber} {special items to help with dressing} {adapted utensils} that {you/SP} (and {your}/{his/her}) family paid for in the last year, about how much was that altogether? Was it more than \$500, less than \$500, or just about \$500?

CODES

- | | | |
|---|------------------|------------|
| 1 | MORE THAN \$500 | |
| 2 | LESS THAN \$500 | EM7 |
| 3 | JUST ABOUT \$500 | Section CM |
| | REFUSED | Section CM |
| | DON'T KNOW | Section CM |
-

EM6

em1morls1000

R1 EM6 MORE LESS OR ABOUT \$1000

QUESTION TEXT:

Was it more than \$1,000, less than \$1,000, or just about \$1,000?

CODES

- | | | |
|---|--------------------|------------|
| 1 | MORE THAN \$1,000 | Section CM |
| 2 | LESS THAN \$1,000 | Section CM |
| 3 | JUST ABOUT \$1,000 | Section CM |
| | REFUSED | Section CM |
| | DON'T KNOW | Section CM |
-

EM7

em1morls100

R1 EM7 MORE LESS OR ABOUT \$100

QUESTION TEXT:

Was it more than \$100, less than \$100, or just about \$100?

CODES

- | | |
|---|------------------|
| 1 | MORE THAN \$100 |
| 2 | LESS THAN \$100 |
| 3 | JUST ABOUT \$100 |
| | REFUSED |
| | DON'T KNOW |
-

National Study Round 1

Section CM [COMMUNITY]

Sequence: 11

CM1PRE

CM1PRE

NOT ON FILE

Now I'm going to read some statements about the community where {you live/SP lives}.

PRESS 1 AND ENTER TO CONTINUE

CM1

cm1knowwell

R1 CM1 PEOPL KNOW EACH OTHR WELL

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

Display CM1, 2, and 4 on the same screen

QUESTION TEXT:

People in {this/SP's} community know each other very well. [Do you agree a lot, a little, or do you not agree?]

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |
-

CM2

cm1willnghlp

R1 CM2 PEOPL WILLG HLP EACH OTHR

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

Display CM1, 2, and 4 on the same screen

QUESTION TEXT:

People in {this/SP's} community are willing to help each other. [Do you agree a lot, a little, or do you not agree?]

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |
-

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

Display CM1, 2, and 4 on the same screen

QUESTION TEXT:

People in {this/SP's} community can be trusted. [Do you agree a lot, a little, or do you not agree?]

CODES

- | | |
|---|----------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | DO NOT AGREE |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

GO TO SECTION TE – TECHNOLOGICAL ENVIRONMENT

National Study Round 1

Section TE [TECHNOLOGICAL ENVIRONMENT] Sequence: 12

TE1PRE

TE1PRE

NOT ON FILE

Now I have a few questions about the phones and computers {you/SP} may have in {your/his/her} {home/apartment/room/unit/suite/other}.

PRESS 1 AND ENTER TO CONTINUE

TE1

te1cellphone

R1 TE1 WORKING CELL PHONE

QUESTION TEXT:

{Do you/Does SP} have a working cell phone?

IF NEEDED: A cell phone is a phone that you can use anywhere you go.

CODES

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

TE3

te1othrphone

R1 TE3 ONE PHONE OTHER THAN CELL

QUESTION TEXT:

Is there at least one working telephone in {your/SP's} {home/apartment/room/unit/suite/other} that is not a cell phone?

CODES

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

TE6

te1computer

R1 TE6 HAS A WORKING COMPUTER

QUESTION TEXT:

{Do you/Does SP} have a working computer in {your/his/her} {home/apartment/room/unit/suite/other}?

IF NEEDED: Please include desktops and laptop computers only, not cell phones that go on the Internet or online.

CODES

1	YES	TE9
2	NO	
7	YES, DOESN'T KNOW HOW TO USE A COMPUTER REFUSED DON'T KNOW	BOX TE9

TE8**te1compoth**

R1 TE8 USED COMPUTER ANYWHRE ELS

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display "in {your/his/her} building."

QUESTION TEXT:

In the last month, {have you/has SP} used a computer anywhere else?

IF NEEDED: Other places include {in {your/his/her} building,} at a library, or at a friend or family member's home.

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX TE9**BOX TE9**

NOT ON FILE

If TE1 = 2 (NO CELL PHONE) and TE6 = 2 (NO COMPUTER) and TE8 = 2 (NO COMPUTER USE ELSEWHERE), go to Section MD – Mobility Devices.

If TE1 = 2 (NO CELL PHONE) and TE6 = 7 (DOESN'T KNOW HOW TO USE COMPUTER), go to Section MD – Mobility Devices.

Otherwise, go to TE9.

TE9**te1emailtext**

R1 TE9 EMAIL OR TEXTING

QUESTION TEXT:

In the last month, {have you/has SP} ever sent messages by email or texting?

IF NEEDED: Texting is like email but usually done on a phone.

CODES

1	YES	
2	NO	TE11
	REFUSED	TE11
	DON'T KNOW	TE11

TE10

te1oftnemail

R1 TE10 EMAIL OR TEXTING OFTEN

QUESTION TEXT:

In the last month, how often did {you/SP} send messages by email or texting? Would you say most days, some days or rarely?

CODES

- | | |
|---|------------|
| 1 | MOST DAYS |
| 2 | SOME DAYS |
| 3 | RARELY |
| | REFUSED |
| | DON'T KNOW |

TE11

te1online

R1 TE11 ONLINE COMPUTER USE

DISPLAY INSTRUCTIONS:

If TE9 = 1 (YES), display "Besides email or texting," and "other".

QUESTION TEXT:

In the last month, {besides email or texting, }{have you/has SP} ever gone on the Internet or online for any {other} reason?

CODES

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

TE12

te1shoponli1

R1 TE12A INTERNET SHOP GROCERY

te1shoponli2

R1 TE12B INTERNET BANKING

te1shoponli3

R1 TE12C INTERNET ORDR REFLL RX

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at TE12a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}In the last month, {have you/has SP} gone on the Internet or online to{[]}

{variable text [a-c]}

RESPONSE [1] a. shop for groceries or personal items?
RESPONSE [2] b. pay bills or do banking?
RESPONSE [3] c. order or refill prescriptions?

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.

TE13

te1intrntmd1
te1intrntmd2
te1intrntmd3

R1 TE13A INTERNET MEDICAL PROVDR
R1 TE13B INTERNET INSURANCE INFO
R1 TE13C INTERNET HEALTH CONDS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display
Display "year" in underlined text.

If at TE13a, do not display question text in brackets. Otherwise, display question text in brackets.

QUESTION TEXT:

{[]} In the last year, {have you/has SP} gone on the Internet or online to {}

{variable text [a-c]}

RESPONSE [1] a. contact any of your medical providers?

IF NEEDED: This includes making or changing medical appointments, getting test results, requesting referrals or prescriptions, or to get advice.

RESPONSE [2] b. handle Medicare or other health insurance matters?

IF NEEDED: This includes going to Medicare's website or another insurer's website to find out what is covered, compare plans or providers, find out about bills, or file a claim.

RESPONSE [3] c. get information about {your/his/her} health conditions?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

GO TO SECTION MD.

NHATS Round 1

Section MD [MOBILITY DEVICES]

Sequence: 13

MD1PRE

MD1PRE

NOT ON FILE

The next questions are about items that {you/SP} may use to help {you/him/her} get around more easily, safely, or on {your/his/her} own.

PRESS 1 AND ENTER TO CONTINUE

MD1

md1canewlker

R1 MD1 USED CANE WALKER WHLCHAIR

QUESTION TEXT:

In the last month, {have you/has SP} used a cane, walker, wheelchair, or scooter, yes or no?

PRESS F1 FOR HELP SCREEN

CODES

1	YES	
2	NO	Section SS
	REFUSED	Section SS
	DON'T KNOW	Section SS

MD2

md1cane

R1 MD2 USED A CANE

QUESTION TEXT:

In the last month, which did {you/SP} use?

a cane?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set CANE flag = 1 (yes).

MD3

md1walker

R1 MD3 USED A WALKER

QUESTION TEXT:

[In the last month, did {you/SP} use]

a walker?

IF NEEDED: This includes standard walkers without wheels, rolling and wheeled walkers, and rollators.

CODES

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

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set WALKER flag = 1 (yes).

MD4**md1wheelchar**

R1 MD4 USED A WHEELCHAIR

DISPLAY INSTRUCTIONS:

Display image of wheelchair.

QUESTION TEXT:

SHOW CARD MD1

[In the last month, did {you/SP} use]

a wheelchair?

IF NEEDED: This includes manual, power, electric, or motorized wheelchairs.

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | MD5 |
| | REFUSED | MD5 |
| | DON'T KNOW | MD5 |

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set WHEELCHAIR flag = 1 (yes).

MD4a**md1whelcrspc**

R1 MD4A WHEELCHAIR IN LIVNG SPACE

DISPLAY INSTRUCTIONS:

Display image of wheelchair.

QUESTION TEXT:

{Do you/does SP} have that wheelchair with {you/him/her} where {you live/SP lives}?

IF NEEDED: This includes manual, power, electric, or motorized wheelchairs.

CODES

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

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set WHEELCHAIR HOME flag = 1 (yes).

MD5**md1scooter****R1 MD5 USE A SCOOTER****DISPLAY INSTRUCTIONS:**

Display image of scooter.

QUESTION TEXT:

SHOW CARD MD2

[In the last month, did {you/SP} use]
a scooter?

IF NEEDED: This includes electric or power scooters that are used for travel.

CODES

1	YES	
2	NO	Section SS
	REFUSED	Section SS
	DON'T KNOW	Section SS

PROGRAMMER INSTRUCTIONS:

If 1 is selected, set SCOOTER flag = 1 (yes)

If MD1 = 1 (used device in last month) and MD2 = 2 (didn't use cane) and MD3 = 2 (didn't use walker) and MD4 = 2 (didn't use wheelchair) and MD5 = 2 (didn't use scooter), display error message #7.

MD5a**md1sctterinsp****R1 MD5A SCOOTER IN LIVING SPACE****DISPLAY INSTRUCTIONS:**

Display image of scooter.

QUESTION TEXT:

{Do you/Does SP} have that (power) scooter with {you/him/her} where {you live/he lives/she lives}?

CODES

1	YES	Section SS
2	NO	Section SS
	REFUSED	Section SS
	DON'T KNOW	Section SS

PROGRAMMER INSTRUCTIONS:

If 1 is selected set SCOOTERHOME flag = 1 (yes)

Flag variables set in MD Section	
f1cane	R1 F MD SP USES CANE
f1walker	R1 F MD SP USES WALKER
f1wheelchr	R1 F MD SP USES WHEELCHAIR
f1whlchrhom	R1 F MD SP HAS WHEELCHR AT HOME
f1scooter	R1 F MD SP USES SCOOTER
f1scooterhm	R1 F MD SP HAS SCOOTER AT HOME

NHATS Round 1

Section SS [SENSORY IMPAIRMENTS AND SYMPTOMS]

Sequence: 14

SS3PRE

SS3PRE

NOT ON FILE

Now let's talk about how well {you hear/SP hears}.

PRESS 1 AND ENTER TO CONTINUE

SS3

ss1hearingaid

R1 SS3 HEARING AID USED

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "In the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {have you/has {he/she}} used a hearing aid or other hearing device?

CODES

1	YES	
2	NO	
7	DEAF	SS7PRE
	REFUSED	
	DON'T KNOW	

SS4a

ss1earphone

R1 SS4A SP CAN USE TELEPHONE

DISPLAY INSTRUCTIONS:

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}... "

ELSE DISPLAY "{Do you/Does SP}... "

FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}/{Do you/Does SP}} hear well enough to use the telephone?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS4b

ss1convwradi

R1 SS4B CONVERSATIN WTH TV RADIO

DISPLAY INSTRUCTIONS:

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}..."
ELSE DISPLAY "{Do you/Does SP}... "
FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}}/{Do you/Does SP} hear well enough to carry on a conversation in a room with a radio or TV playing?

CODES

1	YES	SS7PRE
2	NO	
	REFUSED	
	DON'T KNOW	

SS4c

ss1convquiet

R1 SS4C CONVERS IN QUIET ROOM

DISPLAY INSTRUCTIONS:

IF SS3=1 (YES, HEARING AID) DISPLAY "When {you use/SP uses} a hearing aid, {do you/does {he/she}}..."
ELSE DISPLAY "{Do you/Does SP}... "
FOR ITEMS SS4a, SS4b, SS4c USE "SAME QUESTION STEM" DISPLAY

QUESTION TEXT:

{When {you use/SP uses} a hearing aid, {do you/does {he/she}}}/{Do you/Does SP} hear well enough to carry on a conversation in a quiet room?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS7PRE

SS7PRE

NOT ON FILE

Now I have a few questions about how well {you/SP} can see.

PRESS 1 AND ENTER TO CONTINUE

SS7

ss1glasseswr

R1 SS7 WEARS GLASSES CONTCTS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "at a distance" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

{Do you/Does SP} wear glasses or contacts to help {you/him/her} see things at a distance?

CODES

1	YES	
2	NO	
7	BLIND	SS13PRE
	REFUSED	
	DON'T KNOW	

SS8a**ss1seewellst**

R1 SS8A SEES ACROSS THE STREET

DISPLAY INSTRUCTIONS:

IF SS7=1 (GLASSES/CONTACTS FOR DISTANCE) THEN DISPLAY "When {you use/SP uses} glasses or contacts, {do you/does {he/she}}... "

ELSE DISPLAY "{Do you/Does SP}... "

FOR ITEMS SS8a AND SS8b, USE "SAME QUESTION STEM" DISPLAY

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to recognize someone across the street?

CODES

1	YES	SS10
2	NO	
	REFUSED	
	DON'T KNOW	

SS8b**ss1seestvgl**

R1 SS8B TV ACROSS ROOM W GLASSES

DISPLAY INSTRUCTIONS:

IF SS7=1 (GLASSES OR CONTACTS FOR DISTANCE), DISPLAY "When {you use/SP uses} glasses or contacts, {do you/does {he/she}}... "

ELSE DISPLAY "{Do you/Does SP}... "

FOR ITEMS SS8a AND SS8b, USE "SAME QUESTION STEM" DISPLAY

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts, {do you/does {he/she}}/{Do you/Does SP}} see well enough to watch television across the room?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

SS10**ss1glasscls**

R1 SS10 WEAR GLS CONTCS SEE CLOS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "close up" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

{Do you/Does SP} wear glasses or contacts to help {you/him/her} see things close up?

CODES

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

SS11**ss1othvisaid**

R1 SS11 USED OTHER VISION AIDS

QUESTION TEXT:

In the last month, did {you/SP} use other vision aids such as a magnifying glass to help {you/him/her} see things close up?

IF NEEDED: Vision aids include things like a magnifying glass, large-print books, and other tools to help people with vision impairments.

CODES

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

SS12**ss1g|rednewp**

R1 SS12 CAN READ NEWSPAPER PRINT

DISPLAY INSTRUCTIONS:

IF SS10 =1 (GLASSES OR CONTACTS FOR CLOSE UP)) AND SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} glasses or contacts and vision aids", and "do you/does {he/she}"

ELSE IF SS10=1 (GLASSES OR CONTACTS FOR CLOSE UP) AND SS11 NE 1 DISPLAY "When {you use/SP uses} glasses or contacts", and "do you/does {he/she}"

ELSE IF SS11=1 (VISION AID) DISPLAY "When {you use/SP uses} vision aids", and "do you/does {he/she}"

ELSE DISPLAY "{Do you/Does SP}"

QUESTION TEXT:

{When {you use/SP uses} glasses or contacts/When {you use/SP uses} vision aids/When {you use/SP uses} glasses or contacts and vision aids}, {{do you/does {he/she}}}/{Do you/Does SP}} see well enough to read newspaper print?

CODES

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

SS13PRE

SS13PRE

NOT ON FILE

Now I have some questions about health related problems that {you/SP} may have had in the last month.

PRESS 1 AND ENTER TO CONTINUE

SS13

ss1probchswl

R1 SS13 PROBLEMS CHEW OR SWALLOW

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} have problems with chewing or swallowing that caused difficulty when {you/he/she} ate?

CODES

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

SS14

ss1probspeak

R1 SS14 PROBLEMS SPEAKING

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month because of {your/SP's} health, did {you/he/she} have any problems in speaking or in making {yourself/herself/himself} understood when {you talk/he talks/she talks)?

CODES

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

SS15

ss1painbothr

R1 SS15 BOTHERED BY PAIN

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "in the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {have you/has {he/she}} been bothered by pain?

CODES

- | | |
|---|-----|
| 1 | YES |
|---|-----|

2	NO REFUSED DON'T KNOW	SS18a SS19 SS19
---	-----------------------------	-----------------------

SS17 **ss1painlimts** R1 SS17 PAIN EVER LIMITS ACTIVIT

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "In the last month" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, has pain ever limited {your/SP's} activities?

CODES

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

SS18A **ss1painmedof** R1 SS18A LST MNTH OFTEN PAIN MED

QUESTION TEXT:

SHOWCARD SS1

In the last month, how often did {you/SP} take medication for pain? Would you say every day, most days, some days, rarely or never?

CODES

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

BOX SS18B **BOXSS18B** NOT ON FILE

If SS15=1(PAIN) or SS18A=1(PAIN MEDS EVERY DAY), 2 (PAIN MEDS MOST DAYS), 3 (PAIN MEDS SOME DAYS), or 4 (PAIN MEDS RARELY), go to SS18B
Otherwise, go to SS19

SS18B

ss1painwhe1	R1 SS18B BACK PAIN IN LAST MNTH
ss1painwhe2	R1 SS18B HIP PAIN IN LAST MONTH
ss1painwhe3	R1 SS18B KNEE PAIN IN LAST MNTH
ss1painwhe4	R1 SS18B FOOT PAIN IN LAST MNTH

ss1painwhe5	R1 SS18B HAND PAIN IN LAST MNTH
ss1painwhe6	R1 SS18B WRIST PAIN IN LAST MNTH
ss1painwhe7	R1 SS18B SHOULDR PAIN LST MNTH
ss1painwhe8	R1 SS18B HEAD PAIN IN LAST MNTH
ss1painwhe9	R1 SS18B NECK PAIN IN LAST MNTH
ss1painwhe10	R1 SS18B ARM PAIN IN LAST MNTH (from SS18c)
ss1painwhe11	R1 SS18B LEG PAIN IN LAST MNTH (from SS18c)
ss1painwhe12	R1 SS18B STOMACH PAIN LAST MNTH (from SS18c)
ss1painwhe13	R1 SS18B OTHR SPCFY PAIN LST MO

QUESTION TEXT:

SHOW CARD SS2

Please look at this card and tell me where {you have/SP has} had pain in the last month.

SELECT ALL THAT APPLY

CODES

1	BACK	SS19
2	HIPS	SS19
3	KNEES	SS19
4	FEET	SS19
5	HANDS	SS19
6	WRISTS	SS19
7	SHOULDERS	SS19
8	HEAD	SS19
9	NECK	SS19
91	OTHER PLACES (SPECIFY)	

SS18C

SS18C

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PLACES SP HAD PAIN

ENTER TEXT

Length 50

SS19

ss1probbreat

R1 SS19 BREATHING PROBLEMS

QUESTION TEXT:

In the last month, did {you/SP} have any breathing problems, including shortness of breath or difficulty breathing?

CODES

1 YES

2	NO	SS21
	REFUSED	SS21
	DON'T KNOW	SS21

SS20 **ss1prbbrlimt** R1 SS20 BREATH PROBLS LIMIT ACTIV

QUESTION TEXT:

In the last month, did {your/SP's} breathing problems ever limit {your/his/her} activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

SS21 **ss1strnglmup** R1 SS21 UPPER BOD STRENGTH LIMIT

QUESTION TEXT:

In the last month, did {you/SP} have limited strength or movement in {your/his/her} shoulders, arms, or hands?

CODES

1	YES	
2	NO	SS23
	REFUSED	SS23
	DON'T KNOW	SS23

SS22 **ss1uplimtact** R1 SS22 UP BOD STRNGTH LIMIT ACT

QUESTION TEXT:

In the last month, did this problem with {your/SP's} shoulders, arms, or hands ever limit {your/his/her} activities?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

SS23 **ss1lwrbodstr** R1 SS23 LOWER BODY STRNGTH LIMIT

QUESTION TEXT:

In the last month, did {you/SP} have limited strength or movement in {your/his/her} hips, legs, knees, or feet?

CODES

1	YES	
2	NO	SS25
	REFUSED	SS25
	DON'T KNOW	SS25

SS24 **ss1lrbodimp** R1 SS24 LWER BOD STRNGTH IMT ACT

QUESTION TEXT:

In the last month, did this problem with {your/SP's} hips, legs, knees, or feet ever limit {your/his/her} activities?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

SS25 **ss1lowenergy** R1 SS25 LOW ENERGY IN LAST MONTH

QUESTION TEXT:

In the last month, did {you/SP} have low energy or {were you/was SP} easily exhausted?

CODES

1	YES	
2	NO	SS27
	REFUSED	SS27
	DON'T KNOW	SS27

SS26 **ss1loenlmtat** R1 SS26 LOW ENERGY EVER LIM ACT

QUESTION TEXT:

In the last month, did {your/SP's} low energy or exhaustion ever limit {your/his/her} activities?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

SS27 **ss1prbbalcrd** R1 SS27 BALANCE OR COORD PROBS

QUESTION TEXT:

In the last month, did {you/SP} have problems with balance or coordination?

CODES

1	YES	
2	NO	SECTION PC
	REFUSED	SECTION PC
	DON'T KNOW	SECTION PC

SS28

ss1prbbalcnt

R1 SS28 BAL COORD PROB LIMIT ACT

QUESTION TEXT:

In the last month, did {your/SP's} balance or coordination problems ever limit {your/SP's} activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section PC – Physical Capacity

NHATS Round 1

Section PC [PHYSICAL CAPACITY]

Sequence: 16

PC1PRE

PC1PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL AND WALKER FLAG=1 (YES), DISPLAY "walker"

QUESTION TEXT:

We are interested in whether {you have /SP has} difficulty with physical movements when {you do/he does/she does} them without help from another person {and without {your/his/her} {cane/walker/cane or walker}}.

PRESS 1 AND ENTER TO CONTINUE

PC1

pc1walk6blks

R1 PC1 ABLE TO WALK 6 BLOCKS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...".

DISPLAY TEXT "able" and "6 blocks" and "without" AS BOLD UNDERLINED TEXT

IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL AND WALKER FLAG=1 (YES), DISPLAY "walker"

QUESTION TEXT:

In the last month, {were you/was SP} able to... walk 6 blocks, or about half a mile, by {yourself/himself/herself} {and without {your/his/her} {cane/walker/cane or walker}}?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | PC3 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |
-

PC2

pc1walk3blks

R1 PC2 ABLE TO WALK 3 BLOCKS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES) DISPLAY "and without {your/his/her}...".

DISPLAY TEXT "able" and "3 blocks" and "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"

ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL AND WALKER FLAG=1 (YES), DISPLAY "walker"

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk 3 blocks by {yourself/himself/herself}{and without {your/his/her}{cane/walker/cane or walker}}?

CODES

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

PC3

pc1up2ostair

R1 PC3 ABLE TO WALK UP 20 STAIRS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane".

DISPLAY TEXT "able" and "20 stairs" and "without" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk up 20 stairs (about two flights) by {yourself/himself/herself}{and without {your/his/her} cane}?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | PC5 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |
-

PC4

pc1up1ostair

R1 PC4 ABLE TO WALK UP 10 STAIRS

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "able" and "10 stairs" AND "without" AS BOLD UNDERLINED TEXT

IF CANE FLAG=1 (YES), DISPLAY "and without {your/his/her} cane"

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] walk up 10 stairs by {yourself/himself/herself}{and without {your/his/her} cane}?

CODES

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

PC5

pc1car20pnds

R1 PC5 ABLE TO CARRY 20 POUNDS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL AND WALKER FLAG=1 (YES), DISPLAY "walker"

DISPLAY TEXT "able" and "20 pounds" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] lift and carry 20 pounds, or two full bags of groceries, by {yourself/himself/herself}{and without {your/his/her} {cane/walker/cane or walker}}?

CODES

1	YES	PC7
2	NO	
	REFUSED	
	DON'T KNOW	

PC6**pc1car10pnds**

R1 PC6 ABLE TO CARRY 10 POUNDS

DISPLAY INSTRUCTIONS:

IF CANE FLAG=1 (YES) OR WALKER FLAG=1 (YES), DISPLAY "and without {your/his/her}...". DISPLAY TEXT "without" AS BOLD UNDERLINED TEXT.

DISPLAY TEXT "able" and "10 pound" AS BOLD UNDERLINED TEXT.

IF CANE FLAG=1 (YES) AND WALKER FLAG IS NULL, DISPLAY "cane"
ELSE IF CANE FLAG=1 (YES) AND WALKER FLAG=1 (YES), DISPLAY "cane or walker"
ELSE IF CANE FLAG IS NULL AND WALKER FLAG=1 (YES), DISPLAY "walker"

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] lift and carry a 10-pound object by {yourself/himself/herself}{and without {your/his/her} {cane/walker/cane or walker}}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PC7**pc1geonknees**

R1 PC7 ABLE TO GET DOWN ON KNEES

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] get down on {your/his/her} knees and get back up without holding on to anyone or anything?

CODES

1	YES	PC9
---	-----	-----

2

NO
REFUSED
DON'T KNOW

PC8

pc1bendover

R1 PC8 ABLE TO BEND OVER

DISPLAY INSTRUCTIONS:

DISPLAY QUESTION TEXT "able" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month {were you/was SP} able to...] bend over without holding on to anyone or anything?

CODES

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

PC9

pc1hvobovrhd

R1 PC9 HEAVY OBJECT ABOVE HEAD

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] put a heavy book or other object on a shelf above {your/his/her} head?

CODES

- | | | |
|---|------------|------|
| 1 | YES | PC11 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |
-

PC10

pc1rechovrhd

R1 PC10 ABLE TO REACH OVERHEAD

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] reach up over {your/his/her} head without holding on to anyone or anything?

CODES

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

PC11

pc1opnjarwhd

R1 PC11 OPEN SEALED JAR W HANDS

DISPLAY INSTRUCTIONS:

DISPLAY TEXT "able" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to...] open a sealed jar using just {your/his/her} hands?

CODES

1	YES	SECTION CP
2	NO	
	REFUSED	
	DON'T KNOW	

PC12

pc1grspsmobj

R1 PC12 ABLE GRASP SMALL OBJECTS

DISPLAY INSTRUCTIONS:

DISPLAY "able" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

[In the last month, {were you/was SP} able to ...]use {your/his/her} fingers to grasp or handle small objects?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section CP – Cognition (Proxy)

NHATS Round 1

Section CP [COGNITION (PROXY)]

Sequence: 17

BOX CP1PRE

BOX CP1PRE

NOT ON FILE

If PROXY flag = 1 (yes), go to CP1PRE.
Otherwise, go to Section CG Cognition (SP).

CP1PRE

CP1PRE

NOT ON FILE

QUESTION TEXT:

Part of this study is concerned with people's memory and ability to think about things.

PRESS 1 AND ENTER TO CONTINUE

CP1

cp1memrygood

R1 CP1 HOW GOOD MEMRY AT PRESNT

DISPLAY INSTRUCTIONS:

DISPLAY "at the present time" IN BOLD UNDERLINED TEXT.

QUESTION TEXT:

First, how would you rate {SP's} memory at the present time? Would you say it is excellent, very good, good, fair, or poor?

CODES

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

BOX CP2

BOXCP2

NOT ON FILE

If IS9 = 30-37, or 92 (proxy is not a relative), go to CP2.
Otherwise, go to CP3PRE.

CP2

cp1knownspyr

R1 CP2 KNOWN SP 4 AT LEAST A YR

DISPLAY INSTRUCTIONS:

Spell out month in question text (for example, display "March" rather than "3")

QUESTION TEXT:

Have you known {SP} for at least 1 year, that is since {CURRENT MONTH, YEAR - 1 year}?

CODES

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

CP3PRE**CP3PRE**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If CP2 = 1 (known at least 1 year) or IS9 = 2-29, 91 (proxy is relative), display "in the last several years". Otherwise, display "since you have known {him/her}".

QUESTION TEXT:

Now, I'd like to ask some questions about whether you have noticed any changes in {SP} {in the last several years/since you have known {him/her}} due to thinking and memory problems.

PRESS 1 AND ENTER TO CONTINUE

CP3

cp1chgthink1
cp1chgthink2
cp1chgthink3
cp1chgthink4
cp1chgthink5
cp1chgthink6
cp1chgthink7
cp1chgthink8

R1 CP3A SP DIFF REMEMBER DATE
R1 CP3B SP REPEATS SELF
R1 CP3C SP DIFF REMEMBER APPT
R1 CP3D SP CHNG INTRST ACT HOB
R1 CP3E SP DIFF WITH MONEY MGMT
R1 CP3F SP DIFF LEARNNG USE TOOL
R1 CP3G SP PRBLMS WITH JDGMNT
R1 CP3H SP DLY PRBLMS W THNK MEM

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If CP2 = 1 (known at least 1 year) or IS9 = 2-29, 91 (proxy is relative), display "in the last several years". Otherwise, display "since you have known {him/her}".

Display the current response item text as a fill in the "IF NEEDED" statement.

If at CP3a, do not display question text in brackets.
Otherwise, display question text in brackets.
If at CP3a, display "first"
If at CP3b-CP3g, display "next"
If at CP3h, display "last"

QUESTION TEXT:

{[]} I'll read some statements about {him/her}. If there has been a change {in the last several years/since you have known {him/her}} caused by {his/her} thinking and memory problems, please say "Yes". Otherwise say "No".{[]}

The {first/next/last} item is [READ ITEM].

{variable text [a-h]}

IF NEEDED: Has there been a change caused by {his/her} thinking and memory problems in {RESPONSE ITEM a-h}?

RESPONSE [1] a. remembering the month or year

RESPONSE [2] b. repeating questions, stories, or statements

RESPONSE [3] c. difficulty remembering appointments

RESPONSE [4] d. interest in hobbies or activities

RESPONSE [5] e. difficulty handling money matters like balancing a checkbook or paying bills

RESPONSE [6] f. trouble learning how to use a tool, appliance or gadget, for example a TV remote control or microwave

RESPONSE [7] g. problems with judgment, for example falling for scams or buying gifts that are inappropriate for the recipient

RESPONSE [8] h. daily problems with thinking and/or memory

CODES

- | | |
|---|--|
| 1 | YES, A CHANGE |
| 2 | NO, NO CHANGE |
| 3 | DEMENTIA/ALZHEIMER'S REPORTED BY PROXY |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

CP4

cp1memcogpr1
cp1memcogpr2
cp1memcogpr3
cp1memcogpr4

R1 CP4A LOST IN FAMILIAR ENVIRON
R1 CP4B SP WANDERD OFF NO RETRN
R1 CP4C SP ABLE LEFT ALONE 1 HR
R1 CP4D SP HEARS SEES THNGS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at CP4a, do not display question text in brackets

Otherwise display question text in brackets

QUESTION TEXT:

{[]} I have a few other questions. In the last year...{[]}

{variable text [a-d]}

RESPONSE[1] a. did {he/she} ever get lost in a familiar environment?

RESPONSE[2] b. did {he/she} ever wander off and not return by {himself/herself}?

RESPONSE[3] c. was {he/she} able to be left alone for an hour or so?

RESPONSE[4] d. did{he/she} hear or see things that were not really there?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

GO TO SECTION CG - COGNITION (SP)

NHATS Round 1

Section CG [COGNITION (SP)]

Sequence: 18

BOX CG1PRE **BOXCG1PRE** NOT ON FILE

If PROXY flag = 1 (yes), go to CG1APRE.
Otherwise, go to CG2PRE.

CG1APRE **CG1APRE** NOT ON FILE

QUESTION TEXT:

There are a few questions that I would like to ask {SP} so that the study can better understand memory in people {his/her} age. Some may be hard to answer, but it is important to the study that we ask these.

PRESS 1 AND ENTER TO CONTINUE

CG1A **cg1speaktosp** R1 CG1A MAY SPEAK TO SP ASK QUES

QUESTION TEXT:

May I speak to {SP} and ask {him/her} a few questions?

CODES

1	YES	CG1d
2	NO	

CG1B **CG1B** NOT ON FILE

QUESTION TEXT:

IF SP IS NOT IN THE ROOM, ASK PROXY TO HAVE {SP} JOIN YOU

IF/WHEN SP IS IN THE ROOM, PRESS 1 AND ENTER TO CONTINUE

CG1C **cg1quesremem** R1 CG1C START W QUES ABOUT MEMRY

QUESTION TEXT:

I will start with a question about memory. Does that sound OK?

CODES

1	YES	CG6PRE
2	NO	
	REFUSED	
	DON'T KNOW	

CG1D **cg1reascano1** R1 CG1D SP CANT ANS DEMENTIA

cg1reascano2 R1 CG1D SP CANT ANS UNABLE SPEAK

cg1reascano3 R1 CG1D SP CANT ANS UNABLE HEAR

cg1reascano4	R1 CG1D SP CANT ANS SP REFUSED
cg1reascano5	R1 CG1D SP CANT ANS PROXY REFUSD
cg1reascano6	R1 CG1D SP CANT ANS NOT PRESENT (from CG1e)
cg1reascano7	R1 CG1D SP CANT ANS SP TOO ILL (from CG1e)
cg1reascano8	R1 CG1D SP CANT ANS LANG BARRIER (from CG1e)
cg1reascano9	R1 CG1D SP CANT ANS OTHR SPECIFY

QUESTION TEXT:

What is the main reason you feel (you/he/she) cannot answer questions about memory?

SELECT ALL THAT APPLY

CODES	Code All That Apply
1	SP HAS DEMENTIA/ALZHEIMER'S/NOT ABLE
2	SP IS UNABLE TO SPEAK
3	SP IS UNABLE TO HEAR
4	SP REFUSED
5	PROXY REFUSED
91	OTHER (SPECIFY)

CG1E

CG1E

NOT ON FILE

QUESTION TEXT:

SPECIFY THE OTHER REASON SP CANNOT ANSWER QUESTIONS ABOUT MEMORY

ENTER TEXT

Length 255

PROGRAMMER INSTRUCTIONS:

Go to Section MO Mobility.

CG2PRE

CG2PRE

NOT ON FILE

QUESTION TEXT:

The next few questions are about people's memory and ability to think about things. It is important for the study to better understand memory in people as they age.

PRESS 1 AND ENTER TO CONTINUE

CG2

cg1ratememory

R1 CG2 RATE YOUR MEMORY

DISPLAY INSTRUCTIONS:

Display "at the present time" in bold underlined text.

QUESTION TEXT:

First, how would you rate your memory at the present time? Would you say it is excellent, very good, good, fair, or poor?

CODES

1 EXCELLENT

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

BOX CG3

BOXCG3

NOT ON FILE

If CG2=1 (excellent) or 2 (very good)), go to CG4.
Otherwise, go to CG3.

CG3

cg1ofmemprob

R1 CG3 OFTN MEMRY PROBS INTERFER

QUESTION TEXT:

SHOW CARD CG1

In the last month, how often did memory problems interfere with your daily activities? Would you say every day, most days, some days, rarely, or never?

CODES

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

CG4

cg1memcom1yr

R1 CG4 MEMRY COMPARD TO 1 YR AGO

DISPLAY INSTRUCTIONS:

Display "1 year ago" in bold underlined text.

QUESTION TEXT:

SHOW CARD CG2

Compared to 1 year ago, would you say your memory is much better now, better now, about the same, worse now, or much worse now than it was then?

CODES

- | | |
|---|-------------|
| 1 | MUCH BETTER |
| 2 | BETTER |
| 3 | SAME |
| 4 | WORSE |
| 5 | MUCH WORSE |
| | REFUSED |
| | DON'T KNOW |
-

CG6PRE

CG6PRE

NOT ON FILE

QUESTION TEXT:

We're interested in how memory actually works. We find that even people with very good memories seem to forget some things from time to time. The next questions are a little different, but are often asked on studies about memory.

PRESS 1 AND ENTER TO CONTINUE

CG6A**cg1todaydat1**

R1 CG6A TODAY'S DATE CORRCT MNTH

cg1todaydat2

R1 CG6B TODAY'S DATE CORRECT DAY

cg1todaydat3

R1 CG6C TODAY'S DATE CORRECT YR

cg1todaydat4

R1 CG6D TODAY'S DATE CORRCT DOW

cg1todaydat5

R1 CG6E TODAY'S DATE SP USED AID

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at CG6a, do not display question text in brackets. Otherwise, display question text in brackets.

Spell out month in question text and also as a numeric date as indicated in interviewer question text.

If at CG6d, display "IF SP DID NOT ALREADY MENTION DAY OF THE WEEK, ASK: What is the day of the week?".

Display "MONTH", "DAY", "YEAR", and "DAY OF THE WEEK" in underlined text.

QUESTION TEXT:

{[]Without looking at a calendar or watch, please tell me today's date.[]}

{IF SP DID NOT ALREADY MENTION DAY OF THE WEEK, ASK: What is the day of the week?}

TODAY'S DATE IS: {DAY OF WEEK}, {MONTH DAY,YEAR} {(mm/dd/yyyy)}

CODE NO (2) FOR DON'T KNOW RESPONSES

RESPONSE [1] a. DID SP SAY THE CORRECT MONTH?

RESPONSE [2] b. DID SP SAY THE CORRECT DAY?

RESPONSE [3] c. DID SP SAY THE CORRECT YEAR?

RESPONSE [4] d. DID SP SAY THE CORRECT DAY OF THE WEEK?

RESPONSE [5] e. DID SP LOOK AT A CALENDAR, NEWSPAPER, WATCH, OR OTHER AID FOR THE DATE?

CODES

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

PROGRAMMER INSTRUCTIONS:

Disallow RF for response [5]e.

BOX CG7**BOXCG7**

NOT ON FILE

If PROXY flag =1 and CG6a-CG6e=2(No/Don't Know) or REFUSED, go Section MO Mobility.
Otherwise, go to CG7PRE.

CG7PRE**cg1prewrdrcl**

R1 CG7PRE INTRO TO WORD RECALL

QUESTION TEXT:

Now I will read a set of 10 words and ask you to recall as many as you can. We have purposely made the list long so that it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully as I read the set of words because I cannot repeat them. When I finish, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

IF SP ASKS TO WRITE DOWN WORDS, SAY: We want you to try to recall the words without any help.

REPEAT INSTRUCTIONS ABOVE AS NEEDED FOR SP TO UNDERSTAND ACTIVITY BEFORE CONTINUING

CODES

- | | | |
|---|------------------------|-----|
| 1 | CONTINUE WITH ACTIVITY | CG9 |
| 2 | SP REFUSES ACTIVITY | |

CG7**cg1dwrldstnm****R1 D WHCH WORD LIST WAS ASSIGNED****DISPLAY INSTRUCTIONS:**

If WORD RECALL LIST 1ST ADMIN = 1 (from preload), display words from word list 1.
Else if WORD RECALL LIST 1ST ADMIN = 2 (from preload), display words from word list 2.
Else if WORD RECALL LIST 1ST ADMIN = 3 (from preload), display words from word list 3.
Display one word from list 1, 2, or 3 one at a time every 2 seconds using Blaise timer application.
Display words in font size 36 in the middle of the screen.
Display interviewer instruction at the top of the screen in regular font size.

{variable text [1-3]}

[LIST 1]

hotel
river
tree
skin
gold
market
paper
child
king
book

[LIST 2]

woman
rock
blood
corner
shoes
letter
girl
house
valley
engine

[LIST 3]

water
church
doctor
palace
fire
garden
sea

village
baby
table

QUESTION TEXT:

READ THE WORDS DISPLAYED AT A SLOW, STEADY RATE AS THEY COME UP ON THE SCREEN. APPROXIMATELY 1 WORD EVERY 2 SECONDS

PRESS 1 AND ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

After the last word, automatically advance screen to CG8.

CG7a

CG7a

NOT ON FILE

AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE.

CG8

cg1wrdsrca1	R1 CG8 1 TELL WORDS U CAN RECALL
cg1wrdsrca2	R1 CG8 2 TELL WORDS U CAN RECALL
cg1wrdsrca3	R1 CG8 3 TELL WORDS U CAN RECALL
cg1wrdsrca4	R1 CG8 4 TELL WORDS U CAN RECALL
cg1wrdsrca5	R1 CG8 5 TELL WORDS U CAN RECALL
cg1wrdsrca6	R1 CG8 6 TELL WORDS U CAN RECALL
cg1wrdsrca7	R1 CG8 7 TELL WORDS U CAN RECALL
cg1wrdsrca8	R1 CG8 8 TELL WORDS U CAN RECALL
cg1wrdsrca9	R1 CG8 9 TELL WORDS U CAN RECALL
cg1wrdsrca10	R1 CG8 10 TELL WORDS U CAN RECALL
cg1dwrdirref	R1 D IMMEDIATE WORD RECALL
cg1dwrdirnone	R1 D IMMEDIATE RECALL NONE
cg1dwrdirref	R1 D IMMEDIATE RECALL REFUSED

DISPLAY INSTRUCTIONS:

Display word list that was presented in CG7 for this administration.

Display response codes 91 and 92 response categories in a column beside the word list.

QUESTION TEXT:

Now please tell me the words you can recall.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE: Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]
hotel
river
tree

skin
gold
market
paper
child
king
book

[LIST 2]
woman
rock
blood
corner
shoes
letter
girl
house
valley
engine

[LIST 3]
water
church
doctor
palace
fire
garden
sea
village
baby
table

91. NO WORDS REMEMBERED

92. REFUSED

PROGRAMMER INSTRUCTIONS:

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message “INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

If 91 or 92 selected, go to CG9.

CG8a

cg1wrdsntlst

R1 CG8A WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

CODES

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

CG9

CG8b

cg1numnotlst

R1 CG8B NUM WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

ENTER NUMBER

RANGE 1-10

ENTER NUMBER

Range

1 to 10

CG9

cg1probreca1
cg1probreca2
cg1probreca3
cg1probreca4

R1 CG9 SP HAD DIFF HEARING WORDS
R1 CG9 INTERRUPTION AS LIST READ
R1 CG9 PROB WORD RECALL SPECIFY
R1 CG9 WD RECALL NO PROB OCCURRD

QUESTION TEXT:

DID SP HAVE ANY PROBLEMS DURING THE WORD RECALL TASK?

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	DIFFICULTY HEARING ANY OF THE WORDS	CG10
2	INTERRUPTION OCCURRED WHILE LIST WAS BEING READ	CG10
91	OTHER PROBLEM (SPECIFY)	
92	NO PROBLEMS OCCURRED	CG10

PROGRAMMER INSTRUCTIONS:

Response code 92 cannot be selected in combination with any other code. Display error message “INCONSISTENT ANSWER. NO PROBLEMS OCCURRED CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

CG9A**CG9A**

NOT ON FILE

QUESTION TEXT:

SPECIFY THE TYPE OF PROBLEM EXPERIENCED DURING WORD RECALL TASK

ENTER TEXT

Length

255

CG10

cg1dclkdraw
cg1dclkimgcl

R1 D SCORE OF CLOCK DRAWING TEST
R1 D IMAGE CLARITY CLOCK DRAWING

QUESTION TEXT:

SET STOPWATCH FOR 2 MINUTES IN COUNTDOWN MODE

HAND SP A BLANK SHEET OF PAPER AND AN ERASABLE PEN

IF NEEDED, MAKE SURE SP HAS A WRITING SURFACE. THEN SAY:

Please draw a clock on this piece of paper.

Start by drawing a large circle.

Put all the numbers in the circle and set the hands to show 11:10 (10 pas 11)."

START STOPWATCH

STOP ACTIVITY WHEN 2 MINS IS UP OR BEFORE IF SP SAYS DONE

PRESS 1 AND ENTER TO CONTINUE

CG10A

cg1atdrwclck

R1 CG10A SP ATTEMPT CLOCK DRAWIG

QUESTION TEXT:

INDICATE WHETHER SP ATTEMPTED CLOCK DRAWING

IF SP ATTEMPTED CLOCK DRAWING, AFFIX SP ID LABEL ON THE LOWER LEFT HAND CORNER OF CLOCK DRAWING SHEET

CODES

- | | |
|----|----------------------------------|
| 1 | SP ATTEMPTED CLOCK DRAWING |
| 2 | SP DID NOT ATTEMPT CLOCK DRAWING |
| 97 | SP REFUSED CLOCK DRAWING |

CG13

cg1presidna1

R1 CG13A PRES LAST NAME CORRECT

cg1presidna2

R1 CG13B PRES LAST NAME INCORRCT

cg1presidna3

R1 CG13C PRES FIRST NAME CORRCT

cg1presidna4

R1 CG13D PRES FIRST NAME INCORR

DISPLAY INSTRUCTIONS:

Display "FIRST", "LAST", "first", and "last" in underlined text.

QUESTION TEXT:

Next, who is the President of the United States right now?

CORRECT ANSWER IS BARACK OBAMA

IF ONLY FIRST NAME GIVEN, ASK: Do you know his last name?

IF ONLY LAST NAME GIVEN, ASK: Do you know his first name?

SELECT ALL THAT APPLY

CODES

Code All That Apply

- | | |
|---|--------------------------------------|
| 1 | LAST NAME CORRECT |
| 2 | LAST NAME NOT CORRECT/DK LAST NAME |
| 3 | FIRST NAME CORRECT |
| 4 | FIRST NAME NOT CORRECT/DK FIRST NAME |
| | REFUSED |

PROGRAMMER INSTRUCTIONS:

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message "INCOMPLETE ANSWER. A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED."

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

CG14	cg1vpname1	R1 CG14A VP LAST NAME CORRECT
	cg1vpname2	R1 CG14B VP LAST NAME INCORRECT
	cg1vpname3	R1 CG14C VP FIRST NAME CORRECT
	cg1vpname4	R1 CG14D VP FIRST NAME INCORRECT

DISPLAY INSTRUCTIONS:

Display "FIRST", "LAST", "first", and "last" in underlined text.

QUESTION TEXT:

Who is the Vice President?

CORRECT ANSWER IS JOE (JOSEPH) BIDEN

IF ONLY FIRST NAME GIVEN, ASK: Do you know his last name?
IF ONLY LAST NAME GIVEN, ASK: Do you know his first name?

SELECT ALL THAT APPLY

CODES	Code All That Apply
1	LAST NAME CORRECT
2	LAST NAME NOT CORRECT/DK LAST NAME
3	FIRST NAME CORRECT
4	FIRST NAME NOT CORRECT/DK FIRST NAME REFUSED

PROGRAMMER INSTRUCTIONS:

If (RF is not selected) and (codes 1 or 2) and (codes 3 or 4) are not selected, display error message "INCOMPLETE ANSWER. A RESPONSE TO BOTH THE FIRST NAME AND THE LAST NAME MUST BE SELECTED."

If codes 1 and 2 are selected, display error message "INCONSISTENT ANSWER. LAST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

If codes 3 and 4 are selected, display error message "INCONSISTENT ANSWER. FIRST NAME CANNOT BE BOTH CORRECT AND NOT CORRECT OR UNKNOWN".

BOX CG15**BOXCG15****NOT ON FILE**

IF CG7PRE = 2 (SP REFUSES ACTIVITY), GO TO SECTION MO - MOBILITY
ELSE GO TO CG15

CG15

cg1wrdsdcal1	R1 CG15 1 DELAYED WORD RECALL
cg1wrdsdcal2	R1 CG15 2 DELAYED WORD RECALL

cg1wrdsdcal3	R1 CG15 3 DELAYED WORD RECALL
cg1wrdsdcal4	R1 CG15 4 DELAYED WORD RECALL
cg1wrdsdcal5	R1 CG15 5 DELAYED WORD RECALL
cg1wrdsdcal6	R1 CG15 6 DELAYED WORD RECALL
cg1wrdsdcal7	R1 CG15 7 DELAYED WORD RECALL
cg1wrdsdcal8	R1 CG15 8 DELAYED WORD RECALL
cg1wrdsdcal9	R1 CG15 9 DELAYED WORD RECALL
cg1wrdsdcal10	R1 CG15 10 DELAYED WORD RECALL
cg1dwrddlyrc	R1 D SCORE DELAYED WORD RECALL
cg1dwrddnone	R1 D DELAYED RECALL NONE
cg1dwrdrref	R1 D DELAYED RECALL REFUSED

DISPLAY

INSTRUCTIONS:

Display word list that was presented in CG7.

Display response codes 91 and 92 response categories in column beside the word list.

QUESTION TEXT:

A little while ago, I read you a list of 10 words and you repeated the ones you could remember. Please tell me any of the words that you remember now.

AFTER 10 SECONDS OF SILENCE, PROBE ONCE: Are there any (other) words you remember?

STOP ACTIVITY AFTER ANOTHER 10 SECONDS OF SILENCE OR IF SP SAYS DONE

SELECT ALL THAT APPLY

{variable text [1-3]}

[LIST 1]

hotel
river
tree
skin
gold
market
paper
child
king
book

[LIST 2]

woman
rock
blood
corner
shoes
letter
girl
house
valley
engine

[LIST 3]

water
church
doctor
palace
fire
garden
sea
village
baby
table

91. NO WORDS REMEMBERED

92. REFUSED

PROGRAMMER INSTRUCTIONS:

If 91 (NO WORDS REMEMBERED) selected and any codes 1-10 or 92 selected, display error message “INCONSISTENT ANSWER. NO WORDS REMEMBERED CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

If response 91 or 92 given, go to Section MO- Mobility.

CG15a

CG15a

NOT ON FILE

AFTER LIST HAS ENDED, TYPE 1 AND ENTER TO CONTINUE.

CG16

cg1wrtnotlst

R1 CG16 WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

DID SP SAY ANY WORDS THAT WERE NOT ON THE LIST?

CODES

1 YES
2 NO

SECTION MO

CG17

cg1numwrtnot

R1 CG17 NUM OF WORDS NOT ON LIST

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

HOW MANY WORDS DID SP SAY THAT WERE NOT ON THE LIST?

ENTER NUMBER
Range 1-10

ENTER NUMBER

Range

1 to 10

Derived Variables from Items in CG Section	
cg1dwrdr1cl	R1 D WORD1 IMMEDIATE RECALL
cg1dwrdr2cl	R1 D WORD2 IMMEDIATE RECALL
cg1dwrdr3cl	R1 D WORD3 IMMEDIATE RECALL
cg1dwrdr4cl	R1 D WORD4 IMMEDIATE RECALL
cg1dwrdr5cl	R1 D WORD5 IMMEDIATE RECALL
cg1dwrdr6cl	R1 D WORD6 IMMEDIATE RECALL
cg1dwrdr7cl	R1 D WORD7 IMMEDIATE RECALL
cg1dwrdr8cl	R1 D WORD8 IMMEDIATE RECALL
cg1dwrdr9cl	R1 D WORD9 IMMEDIATE RECALL
cg1dwrdr10cl	R1 D WORD10 IMMEDIATE RECALL
cg1dwrdrunnrc	R1 D WORD1 DELAYED RECALL [See CG8]
cg1dwrdrinone	R1 D IMMEDIATE RECALL NONE [See CG8]
cg1dwrdirref	R1 D IMMEDIATE RECALL REFUSED [See CG8]
cg1dwrdr1dly	R1 WORD1 DELAYED RECALL
cg1dwrdr2dly	R1 D WORD3 DELAYED RECALL
cg1dwrdr3dly	R1 D WORD4 DELAYED RECALL
cg1dwrdr4dly	R1 D WORD5 DELAYED RECALL
cg1dwrdr5dly	R1 D WORD6 DELAYED RECALL
cg1dwrdr6dly	R1 D WORD7 DELAYED RECALL
cg1dwrdr7dly	R1 D WORD8 DELAYED RECALL
cg1dwrdr8dly	R1 D WORD9 DELAYED RECALL
cg1dwrdr9dly	R1 D WORD10 DELAYED RECALL
cg1dwrdr1odly	R1 D WORD2 DELAYED RECALL
cg1dwrddlyre	R1 D SCORE DELAYED WORD RECALL [See CG15]
cg1dwrddnone	R1 D DELAYED RECALL NONE [See CG15]
cg1dwrddrref	R1 D DELAYED RECALL REFUSED [See CG15]

NHATS Round 1

Section MO [MOBILITY]

Sequence: 20

MO1PRE **MO1PRE** NOT ON FILE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Now we're going to ask about {leaving your/SP leaving {his/her}} {home/building} to go outside.

PRESS 1 AND ENTER TO CONTINUE

MO1 **mo1outoft** R1 MO1 OFTEN GO OUTSIDE

QUESTION TEXT:

SHOW CARD MO1

In the last month, how often did {you/SP} leave {your/his/her} {home/building} to go outside?
Would you say every day, most days, some days, rarely, or never?

CODES

- | | |
|---|------------------------------|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |
- MO10

PROGRAMMER INSTRUCTIONS:

IF MO1=5 (NEVER) SET DIDNTLEAVE FLAG TO 1(YES)

BOX MO2 **BOXMO2** NOT ON FILE

IF CANE FLAG=1(YES) GO TO MO2
ELSE GO TO BOX MO3

MO2 **mo1outcane** R1 MO2 CANE USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her} {home/building} to go outside, how often did {you/he/she} use {your/his/her} cane? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
|---|------------|

2 MOST TIMES
3 SOMETIMES
4 RARELY
5 NEVER
REFUSED
DON'T KNOW

BOX MO3**BOXMO3**

NOT ON FILE

IF WALKER FLAG=1 (YES), GO TO MO3
ELSE GO TO BOX MO4

MO3**mo1outwalkr**

R1 MO3 WALKER USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her}{home/building} to go outside, how often did {you/he/she} use {your/his/her} walker? Would you say every time, most times, sometimes, rarely, or never?

CODES

1 EVERY TIME
2 MOST TIMES
3 SOMETIMES
4 RARELY
5 NEVER
REFUSED
DON'T KNOW

BOX MO4**BOXMO4**

NOT ON FILE

If WHEELCHAIR flag = 1 (yes), go to MO4.
Otherwise, go to BOX MO5.

MO4**mo1outwlchr**

R1 MO4 WHEELCHAIR USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her}{home/building} to go outside, how often did {you/he/she} use a wheelchair? Would you say every time, most times, sometimes, rarely, or never?

CODES

1 EVERY TIME
2 MOST TIMES
3 SOMETIMES
4 RARELY
5 NEVER
REFUSED

DON'T KNOW

BOX MO5

BOXMO5

NOT ON FILE

If SCOOTER flag = 1 (yes), go to MO5.
Otherwise, go to BOX MO6.

MO5

mo1outsctr

R1 MO5 SCOOTER USED OUTSIDE

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} left {your/his/her}{home/building} to go outside, how often did {you/he/she} use a scooter? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |
-

MO6

mo1outhlp

R1 MO6 HELP GO OUTSIDE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} leave {your/his/her}{home/building} to go outside?

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

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | MO8 |
| | REFUSED | MO8 |
| | DON'T KNOW | MO8 |
-

MO6a

op1outhlp

R1 MO6A HELPS SP GO OUTSIDE

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODE LIST.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME,

LAST NAME, and RELATIONSHIP TO SP fields.

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

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

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

QUESTION TEXT:

Who helped {you/SP} do that (leave {your/his/her} {home/building} to go outside)?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MO6b. [What is (his/her) first name?] CONFIRM SPELLING

MO6c. [What is (his/her) last name?] CONFIRM SPELLING

MO6d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSISTER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO6, set HELPSGOOUTSIDE flag = 1 (yes).

MO7

mo1outslf

R1 MO7 LEFT BY YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} left {your/his/her}{home/building} to go outside, how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

CODES

1 MOST TIMES
2 SOMETIMES
3 RARELY
4 NEVER
REFUSED
DON'T KNOW

MO9

MO8

mo1outdif

R1 MO8 HOW DIFFICULT

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO2 = 1,2,3, or 4 (uses cane when leaving building or MO3 = 1,2,3, or 4 (uses walker when leaving building) or MO4 = 1,2,3, or 4 (uses wheelchair when leaving building) or MO5 = 1,2,3, or 4 (uses scooter when leaving building), display "when {you/SP} used {your/his/her}{cane/walker/wheelchair/scooter}".

If MO2 = 1,2,3, or 4 (uses cane when leaving building), display "cane".

If MO3 = 1,2,3, or 4 (uses walker when leaving building), display "walker".

If MO4 = 1,2,3, or 4 (uses wheelchair when leaving building), display "wheelchair".

If MO5 = 1,2,3, or 4 (uses scooter when leaving building), display "scooter".

If more than one (MO2, MO3, MO4, MO5) = 1,2,3, or 4 (used inside), insert "or" between the names of the devices.

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her}{cane / walker / wheelchair / scooter}}, how much difficulty did {you/he/she} have leaving {your/his/her}{home/building} to go outside by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

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

MO9**mo1outyrgo**

R1 MO9 HOW OFTEN LEAVE

DISPLAY INSTRUCTIONS:

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now leave {your/his/her} {home/building} more often, less often, or about the same?

CODES

- | | |
|---|----------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | ABOUT THE SAME |
| | REFUSED |
| | DON'T KNOW |
-

BOX MO10**BOXMO10**

NOT ON FILE

If MO6 = 2 (no help to go outside) and MO8 = 1 (no difficulty going outside by self), go to MO11PRE. Otherwise, go to MO10.

MO10**mo1outwout**

R1 MO10 STAYED IN NO HELP

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO1 = 5 (never left building) or MO7 = 4 (never left building by self), display "no one was there to help {you/him/her} go out".

Otherwise display "{you/he/she} had difficulty going out by {yourself/himself/herself}".

QUESTION TEXT:

In the last month, did {you/SP} ever have to stay in {your/his/her} {home/building} because {no one was there to help {you/him/her} go out/ {you/he/she} had difficulty going out by {yourself/himself/herself}}?

CODES

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

MO11PRE

MO11PRE

NOT ON FILE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

These next few questions are about getting around inside {your/SP's} home {or building}.

PRESS 1 AND ENTER TO CONTINUE

BOX MO11

BOXMO11

NOT ON FILE

If STRUCTURE flag = 2 (multi-unit), go to Mo11
Otherwise, go to BOX MO12.

MO11

mo1oftgoarea

R1 MO11 HOW OFTEN GO OTHER AREAS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display “{apartment/room/unit/suite/other}”.
Otherwise, display “home”.

QUESTION TEXT:

SHOW CARD MO1

In the last month, how often did {you /SP} leave {your/his/her} {home/{apartment/room/unit/suite/other}} to go into other areas of the building? Would you say every day, most days, some days, rarely, or never?

CODES

1	EVERY DAY (7 DAYS A WEEK)	BOX MO13
2	MOST DAYS (5-6 DAYS A WEEK)	BOX MO13
3	SOME DAYS (2-4 DAYS A WEEK)	BOX MO13
4	RARELY (ONCE A WEEK OR LESS)	BOX MO13
5	NEVER	
	REFUSED	
	DON'T KNOW	

BOX MO12

BOXMO12

NOT ON FILE

If STRUCTURE flag = 2 (multi-unit) and MO1 = 5 (never leave building) and MO11= 5 (never go to other parts of building), go to MO12.

If [STRUCTURE flag = 1 (single home) or STRUCTURE flag = 3 (Other)] and MO1 = 5 (never leave home), go to MO12.

Otherwise, go to BOX MO13.

MO12

mo1oflvslepr

R1 MO12 HOW OFTN LEAVE BEDROOM

QUESTION TEXT:

SHOW CARD MO1

In the last month, how often did {you/SP} leave the room where {you sleep/{he/she} sleeps}? Would you say every day, most days, some days, rarely, or never?

CODES

- | | |
|---|------------------------------|
| 1 | EVERY DAY (7 DAYS A WEEK) |
| 2 | MOST DAYS (5-6 DAYS A WEEK) |
| 3 | SOME DAYS (2-4 DAYS A WEEK) |
| 4 | RARELY (ONCE A WEEK OR LESS) |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |
- MO23

PROGRAMMER INSTRUCTIONS:

If MO12 = 5 (never leaves room), set DIDN'T LEAVE ROOM SLEEPS flag = 1 (yes).

BOX MO13**BOXMO13**

NOT ON FILE

If CANE flag = 1 (yes), go to MO13.
Otherwise, go to BOX MO14.

MO13**mo1insdcane**

R1 MO13 OFTEN USED CANE INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/SP} use {your/his/her} cane? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |
-

BOX MO14**BOXMO14**

NOT ON FILE

If WALKER flag = 1 (yes), go to MO14.
Otherwise, go to BOX MO15.

MO14**mo1insdwalkr**

R1 MO14 OFTEN USED WALKER INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} walked around inside {your/his/her} home {or building}, how often did {you/he/she} use {your /his/her} walker? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX MO15**BOXMO15**

NOT ON FILE

If WHEELCHAIR HOME flag = 1 (yes), go to MO15.
Otherwise, go to BOX MO16.

MO15**mo1insdwlchr**

R1 MO15 OFT USD WHEELCHAR INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} wheelchair? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX MO16**BOXMO16**

NOT ON FILE

If SCOOTER HOME flag = 1 (yes), go to MO16.
Otherwise, go to MO17.

MO16**mo1insdsctr**

R1 MO16 OFTEN USD SCOOTER INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} use {your/his/her} scooter? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON’T KNOW |

MO17

mo1oftholdwl

R1 MO17 OFTEN HOLD WALLS INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} went around inside {your/his/her} home {or building}, how often did {you/he/she} hold onto walls or furniture? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON’T KNOW |

MO18

mo1insdhlp

R1 MO18 GOT HELP INSIDE

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display “or building”.

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} get around inside {your/his/her} home {or building}?

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

CODES

1	YES	
2	NO	MO21
	REFUSED	MO21
	DON'T KNOW	MO21

MO19A**op1insdhlp**

R1 MO19A HELPS SP INSIDE HOUSE

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODE LIST.

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

If STRUCTURE flag = 2 (multi-unit), display "or building".

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME, LAST NAME, and RELATIONSHIP TO SP fields.

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

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

QUESTION TEXT:

Who helped with that (getting around inside {your/SP's} home {or building})?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MO19b. [What is (his/her) first name?] CONFIRM SPELLING

MO19c. [What is (his/her) last name?] CONFIRM SPELLING

MO19d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO19, set HELPSAROUNDINSIDE flag = 1 (yes).

MO20

mo1insdsIf

R1 MO20 HOW OFTEN BY YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If STRUCTURE flag = 2 (multi-unit), display "or building."
Otherwise, display only the comma after "home"

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} went around inside {your/his/her} home{,/or building,} how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

CODES

1 MOST TIMES
2 SOMETIMES
3 RARELY
4 NEVER
REFUSED
DON'T KNOW

MO22

MO21**mo1insddif**

R1 MO21 HOW DIFF GET ARD W DEVCE

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO13 = 1,2,3, or 4 (used cane inside) or MO14 = 1,2,3, or 4 (used walker inside) or MO15 = 1,2,3, or 4 (used wheelchair inside) or MO16 = 1,2,3, or 4 (used scooter inside), display "when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter}".

If MO13 = 1,2,3, or 4 (used cane inside), display "cane".

If MO14 = 1,2,3, or 4 (used walker inside), display "walker".

If MO15 = 1,2,3, or 4 (used wheelchair inside), display "wheelchair".

If MO16 = 1,2,3, or 4 (used scooter inside), display "scooter".

If more than one (MO13, MO14, MO15, MO16) = 1,2,3, or 4 (used inside), insert "or" between the names of the devices.

If STRUCTURE flag = 2 (multi-unit), display "or building".

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her} {cane/walker/wheelchair/scooter},} how much difficulty did {you/SP} have getting around inside {your/his/her} home {or building} by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

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

MO22**mo1insdyrgo**

R1 MO22 HOW OFTEN COMPRED YR AGO

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (multi-unit), display "or building".

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now go around {your/his/her} home {or building} more often, less often, or about the same?

CODES

- | | |
|---|----------------|
| 1 | MORE OFTEN |
| 2 | LESS OFTEN |
| 3 | ABOUT THE SAME |
| | REFUSED |
| | DON'T KNOW |
-

BOX MO23**BOXMO23**

NOT ON FILE

If MO18 = 2 (did not get help getting around inside) and MO21= 1 (no difficulty getting around inside), go

to MO24PRE.
Otherwise, go to MO23.

MO23**mo1insdwout**

R1 MO23 PLACES INSIDE DID NOT GO

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If STRUCTURE flag = 2 (multi-unit), display "or building".

If MO20 = 4 (never went around inside by self) or MO12 = 5 (never left room where slept), display "no one was there to help {you/him/her}".

Otherwise display "it was too difficult to go there by {yourself/himself/herself}".

QUESTION TEXT:

In the last month, were there any places in {your/SP's} home {or building} that {you/he/she} did not go because {no one was there to help {you/him/her}/it was too difficult to go there by {yourself/himself/herself}}?

CODES

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

MO24PRE**MO24PRE**

NOT ON FILE

QUESTION TEXT:

These next few questions are about getting in and out of bed.

PRESS 1 AND ENTER TO CONTINUE

BOX MO24**BOXMO24**

NOT ON FILE

If CANE flag = 1 (yes) or WALKER flag = 1 (yes), go to MO24.
Otherwise, go to MO25.

MO24**mo1beddev**

R1 MO24 OUT OF BED USED DEVICE

DISPLAY INSTRUCTIONS:

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

If CANE flag is null and WALKER flag = 1 (yes), display "walker".

QUESTION TEXT:

SHOW CARD MO2

In the last month, when {you/SP} got out of bed, how often did {you/he/she} use {your/his/her} {cane / walker / cane or walker} to help? Would you say every time, most times, sometimes, rarely, or never?

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |
-

MO25**mo1bedhlp**

R1 MO25 GOT HELP OUT OF BED

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} get out of bed?

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

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | MO27 |
| | REFUSED | MO27 |
| | DON'T KNOW | MO27 |
-

MO25a**op1bedhlp**

R1 MO25A HELPS SP OUT OF BED

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

QUESTION TEXT:

Who helped {you/SP} do that (get out of bed)?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MO25b. [What is (his/her) first name?] CONFIRM SPELLING

MO25c. [What is (his/her) last name?] CONFIRM SPELLING

MO25d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MO25, set HELPSOUTOFBED flag = 1 (yes).

MO26

mo1bedslf

R1 MO26 OFT GOT OUT BED BY SLF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MO3

In the last month, when {you/SP} got out of bed, how often did {you/he/she} do this by {yourself/himself/herself}? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	MO28
	REFUSED	
	DON'T KNOW	

MO27

mo1beddif

R1 MO27 DIFF GET OUT BED BY SELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO24 = 1,2,3, or 4 (used cane or walker to get out of bed), display "when {you/SP} used {your/his/her} {cane/walker/cane or walker}".

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

If CANE flag is null and WALKER flag = 1 (yes), display "walker".

QUESTION TEXT:

In the last month, {when {you/SP} used {your/his/her} {cane/walker/cane or walker}} how much difficulty did {you/he/she} have getting out of bed by {yourself/himself/herself}? Would you say none, a little, some, or a lot?

CODES

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

BOX MO28

BOXMO28

NOT ON FILE

If MO25 = 2 (no help getting out of bed) and MO27 = 1 (no difficulty getting out of bed), go to Section DM, Duration of Mobility Accommodations.

Otherwise, go to MO28.

MO28

mo1bedwout

R1 MO28 OFTEN HAD TO STAY IN BED

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/himself/herself}" IN BOLD UNDERLINED TEXT

If MO26 = 4 (never got out of bed by self), display "no one was there to help {you/him/her}".

Otherwise display "it was too difficult to get out of bed by {yourself/himself/herself}".

QUESTION TEXT:

In the last month, did {you/SP} ever have to stay in bed because {no one was there to help {you/him/her}/it was too difficult to get out of bed by {yourself/himself/herself}}?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section DM – Duration of Mobility Accommodations.

Derived Variables from Items in MO Section

mo1doutsfdf	R1 D EFFORT TO GO OUTSIDE SELF
mo1doutdevi	R1 D GO OUTSIDE USING DEVICES
mo1douthelp	R1 D GO OUTSIDE USING HELP
mo1dinsdsfdf	R1 D MOVE INSIDE SELF
mo1dinsddevi	R1 D MOVE INSIDE WITH DEVICES
mo1dinsdhelp	R1 D MOVE INSIDE WITH HELP
mo1dbedsfdf	R1 D GET OUT OF BED
mo1beddevi	R1 D DEVICE USE 2 GET OUT OF BED
mo1bedhelp	R1 D HELP TO GET OUT OF BED

Flag Variables set in MO Section

f11didntleav	R1 F MO SP DID NOT LEAVE HOME
f11ntlvrmslp	R1 F MO SP DID NOT LEAVE BEDROOM

NHATS Round 1

Section

DM

[DURATION OF MOBILITY ACCOMMODATIONS]

Sequence: 21

BOX DM1

BOXDM1

NOT ON FILE

If MO6, MO18, and MO25=2 (NO), RF, or DK, go to DM1. Otherwise, go to DM2

DM1

dm1helpmobil

R1 DM1 GET HELP WITH MOBILITY

DISPLAY INSTRUCTIONS:

If STRUCTURE flag = 2 (MULTI-UNIT), display “or building”, and “leaving {your/his/her} building”. Otherwise, display “leaving {your/his/her} home”.

Display "year" in bold underlined text.

QUESTION TEXT:

In the last year, did {you/SP} ever get help with getting out of bed, getting around {your/his/her} home {or building}, or {leaving {your/his/her} home/leaving {your/his/her} building}?

CODES

1	YES	DM3B
2	NO	BOX DM4
	REFUSED	BOX DM4
	DON'T KNOW	BOX DM4

DM2

dm1helpyrmor

R1 DM2 GETTING HELP YR OR MORE

DISPLAY INSTRUCTIONS:

If MO25=1 (YES), display “getting out of bed”.

If MO18=1 (YES), display “getting around {your/his/her} {home/{apartment/room/unit/suite/other}} {or building}”.

If MO6=1 (YES), display “leaving {your/his/her} home/leaving {your/his/her} building”.

If more than one activity displayed, display “or” between each one.

If STRUCTURE flag = 2 (multi-unit), display “or building”, and “leaving {your/his/her} building”. Otherwise, display “leaving {your/his/her} home”.

QUESTION TEXT:

{Have you/Has SP} been getting help with {getting out of bed}{getting around {your/his/her} home {or building}} {leaving {your/his/her} home/leaving {your/his/her} building} for a year or more?

IF NEEDED:{Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	DM3B
2	NO, LESS THAN A YEAR	

REFUSED
DON'T KNOW

BOX DM4
BOX DM4

DM3A**dm1yrsgethlp**

R1 DM3A HOW MANY YRS GETTING HELP

DISPLAY INSTRUCTIONS:

If only one activity displayed at DM2, display “that”.
If more than one activity displayed at DM2, display “any of these activities”.

QUESTION TEXT:

About how many years {have you/has SP} been getting help with {that/any of these activities}?

ENTER NUMBER OF YEARS

ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 50
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.

Soft range: 1-50.

Go to BOX DM4

DM3B**dm1mthgethlp**

R1 DM3B MNTH FIRST LAST GET HLP

DISPLAY INSTRUCTIONS:

If DM1 = 1 (help in last year), display “last” and “any of these activities”.
If DM2 = 2 (help for less than a year) and only one activity displayed at DM2, display “first” and “that”.
If DM2 = 2 (help for less than a year) and more than one activity displayed at DM2, display “first” and “any of these activities”.

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

CODES

1	JANUARY
2	FEBRUARY
3	MARCH
4	APRIL
5	MAY
6	JUNE
7	JULY
8	AUGUST
9	SEPTEMBER
10	OCTOBER
11	NOVEMBER

BOX DM4**BOXDM4**

NOT ON FILE

If CANE flag =1 (YES) or WALKER flag =1 (YES) or WHEELCHAIR flag =1 (YES) or SCOOTER flag =1 (YES), go to DM5.
Otherwise, go to DM4.

DM4**dm1lstycane**

R1 DM4 IN LST YR USE CANE WALKER

QUESTION TEXT:

In the last year, did {you/SP} ever use a cane, walker, wheelchair, or scooter?

CODES

1	YES	DM6B
2	NO	BOX DM7
	REFUSED	BOX DM7
	DON'T KNOW	BOX DM7

DM5**dm1caneforyr**

R1 DM5 USD CANE, ETC. YR OR MORE

DISPLAY INSTRUCTIONS:

If CANE flag=1 (YES), display “cane”.
If WALKER flag=1 (YES), display “walker”.
If WHEELCHAIR flag=1 (YES), display “wheelchair”.
If SCOOTER flag=1 (YES), display “scooter”.

If more than one mobility device displayed, display “or” between each one.

QUESTION TEXT:

{Have you/Has SP} used a {cane} {walker} {wheelchair} {scooter} for a year or more?

IF NEEDED: {Were you/Was SP} using a {cane} {walker} {wheelchair} {scooter} before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	
2	NO, LESS THAN A YEAR	DM6B
	REFUSED	BOX DM7
	DON'T KNOW	BOX DM7

DM6A**dm1yrsuscane**

R1 DM6A YEARS USING A CANE, ETC

DISPLAY INSTRUCTIONS:

If only one mobility device displayed at DM5, display “that”.
If more than one mobility device displayed at DM5, display “any of these”.

QUESTION TEXT:

About how many years {have you/has SP} been using {that/any of these}?

ENTER NUMBER OF YEARS

ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 50
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.

Soft range: 1-50.

Go to BOX DM7

DM6B**dm1mtfrtcane****R1 DM6B MTH FST/LST USE CANE ETC****DISPLAY INSTRUCTIONS:**

If DM4 = 1 (used device in last year), display "last" and "any of these".

If DM5 = 2 (used device for less than a year) and only device displayed at DM5, display "first" and "that".

If DM5 = 2 (used device for less than a year) and more than one device displayed at DM5, display "first" and "any of these".

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} use {that/any of these}?

CODES

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

BOX DM7**BOXDM7****NOT ON FILE**

If {AGE on PERSON ROSTER } = 65, go to Section DT – Driving & Transportation.

Else if DM3a= 997 (HELP WITH ACTIVITIES ENTIRE LIFE), go to BOX DM9.

Else if {AGE on PERSON ROSTER } – {NUMBER OF YEARS from DM3A} ≤ 65, go to BOX DM9.

Otherwise, go to DM7PRE.

DM7PRE**DM7PRE**

NOT ON FILE

QUESTION TEXT:

Now think about the time around when {you/SP} turned 65.

PRESS 1 AND ENTER TO CONTINUE

DM7**dm1mobhelp65**

R1 DM7 GETTIG HLP W MOBIL AGE 65

DISPLAY INSTRUCTIONS:

Display "help" in bold underlined text.

QUESTION TEXT:

{Were you/Was SP} getting help with getting out of bed, getting around {your/his/her} home or leaving {your/his/her} home around the time when {you/he/she} turned 65?

CODES

1	YES	BOX DM9
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DM8**BOXDM8**

NOT ON FILE

If DM2 = 1 (help for a year or more) or 2 (help for less than a year) or DM1 = 1 (help in last year), go to BOX DM9.
Otherwise, go to DM8.

DM8**dm1snc65mohl**

R1 DM8 SINCE 65 EV GET HLP W MOB

QUESTION TEXT:

Since {you/SP} turned 65, was there any time when {you/he/she} got help with any of these activities?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

BOX DM9**BOXDM9**

NOT ON FILE

If DM6a= 997 (USED DEVICES ENTIRE LIFE), go to Section DT – Driving & Transportation.
Else if {AGE on PERSON ROSTER} – {NUMBER OF YEARS from DM6A} ≤ 65, go to Section DT-- Driving & Transportation.
Otherwise, go to DM9.

DM9**dm1at65uscan**

R1 DM9 USE CANE, ETC WHEN TRN 65

QUESTION TEXT:

{Were you/Was SP} using a cane, walker, wheelchair, or scooter around the time when {you/he/she} turned 65?

CODES

1	YES	SECTION DT
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DM10**BOXDM10**

NOT ON FILE

If DM5 = 1 (used device for a year or more) or 2 (used device for less than a year) or DM4 = 1 (used device in last year), go to Section DT, Driving and Transportation.
Otherwise, go to DM10.

DM10**dm1snc65uscn**

R1 DM10 SINCE TURNED 65 USD CANE

QUESTION TEXT:

Since {you/SP} turned 65, was there any time when {you/he/she} used a cane, walker, wheelchair, or scooter to get around?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section DT – Driving and Transportation

Derived Variables from Items in DM Section

dm1dhlpqr	R1 D ANY MOBILITY HELP LAST YEAR
dm1dhlpst	R1 D MTHS MOBILITY HELP STARTED
dm1dhlpnd	R1 D MONTHS MOBILITY HELP ENDED
dm1dhlpysr	R1 D YEARS OF MOBILITY HELP
dm1ddeviyr	R1 D ANY DEVICE USE LAST YR
dm1ddevist	R1 D MTHS DEVICE USE SINCE START
dm1ddeviend	R1 D MONTHS DEVICE USE SINCE END

dm1ddeviyr

R1 D YEARS OF DEVICE USE

NHATS Round 1

Section DT [DRIVING AND TRANSPORTATION]

Sequence: 22

DT1PRE

DT1PRE

NOT ON FILE

QUESTION TEXT:

The next few questions are about how {you get/SP gets} places.

PRESS 1 AND ENTER TO CONTINUE

BOX DT1

BOXDT1

NOT ON FILE

If SS7 = 7 (blind), go to DT2.
If DIDN'T LEAVE flag = 1 (yes), go to DT2.
Otherwise, go to DT1.

DT1

dt1oftedrive

R1 DT1 HOW OFTEN DRIVE PLACES

DISPLAY INSTRUCTIONS:

DT1 THROUGH DT2d SHOULD BE DISPLAYED ON THE SAME SCREEN.
DISPLAY TEXT "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD DT1

In the last month, how often did {you/SP} drive {yourself/himself/herself} places? Would you say every day, most days, some days, rarely, or never?

CODES

1	EVERY DAY (7 DAYS A WEEK)	DT3PRE
2	MOST DAYS (5-6 DAYS A WEEK)	DT3PRE
3	SOME DAYS (2-4 DAYS A WEEK)	DT3PRE
4	RARELY (ONCE A WEEK OR LESS)	DT3PRE
5	NEVER	
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If DT1 = 1, 2, 3, or 4, set DRIVES flag = 1 (YES).

DT2

dt1lastdrove

R1 DT2 WHEN LAST TIME YOU DROVE

QUESTION TEXT:

When was the last time {you/SP} drove?

INDICATE RESPONSE UNIT

CODES

1	MONTH AND YEAR	DT2A1
2	NUMBER OF MONTHS AGO	DT2B

3	NUMBER OF YEARS AGO	DT2C
4	AGE WHEN LAST DROVE	DT2D
7	NEVER DROVE	BOX DT3PRE
	REFUSED	BOX DT3PRE
	DON'T KNOW	BOX DT3PRE

DT2A1 **dt1mthldrov** R1 DT2A1 MONTH LAST DROVE

DISPLAY INSTRUCTIONS:

Display "MONTH" in underlined text.

QUESTION TEXT:

ENTER MONTH AND YEAR {SP} LAST DROVE

ENTER MONTH

ENTER NUMBER

Range	1 to 12
-------	---------

PROGRAMMER INSTRUCTIONS:

Display month label after month entry.

DT2A2 **dt1yr1sdrov** R1 DT2A2 YEAR LAST DROVE

DISPLAY INSTRUCTIONS:

Display DT2a1 and DT2a2 on the same screen.
Display "4-DIGIT YEAR" in underlined text.

QUESTION TEXT:

ENTER MONTH AND YEAR {SP} LAST DROVE
ENTER 4-DIGIT YEAR

ENTER NUMBER

Range	1910 to 2010
Soft Range	1930 to 2010

PROGRAMMER INSTRUCTIONS:

If date formed by DT2a1 and DT2a2 is later than {TODAY'S DATE}, display Error Message #5.

Hard Range is (CURRENT YEAR - 110) to CURRENT YEAR
Soft Range is (CURRENT YEAR - 80) to CURRENT YEAR

Go to Box DT3PRE.

DT2B **dt1mthagodrv** R1 DT2B MONTHS AGO LAST DROVE

DISPLAY INSTRUCTIONS:

Display "MONTHS" in underlined text.

QUESTION TEXT:

ENTER NUMBER OF MONTHS AGO THAT {SP} last drove

ENTER NUMBER

Range

1 to 24

PROGRAMMER INSTRUCTIONS:

Go to Box DT3PRE.

DT2C

dt1yragoldrv

R1 DT2C HOW MNY YRS AGO LST DROV

DISPLAY INSTRUCTIONS:

Display "YEARS" in underlined text.

QUESTION TEXT:

ENTER NUMBER OF YEARS AGO THAT {SP} LAST DROVE

ENTER NUMBER

Range

1 to 95

Soft Range

1 to 30

PROGRAMMER INSTRUCTIONS:

If DT2c > SP AGE, display error message "CONFIRM RESPONSE. NUMBER OF YEARS AGO LAST DROVE IS GREATER THAN SP'S CURRENT AGE".

Go to Box DT3PRE.

DT2D

dt1ageltdrov

R1 DT2D AGE WHEN LAST DROVE

DISPLAY INSTRUCTIONS:

Display "AGE" in underlined text.

QUESTION TEXT:

ENTER SP'S AGE WHEN LAST DROVE

ENTER NUMBER

Range

14 to 100

Soft Range

16 to 90

PROGRAMMER INSTRUCTIONS:

ERROR CHECK: AGE ENTERED AT DT2D SHOULD BE LESS THAN OR EQUAL TO SP AGE on PERSON ROSTER.

BOX DT3PRE

BOXDT3PRE

NOT ON FILE

If (the difference between TODAY'S DATE and date combination in DT2a1 and DT2a2 is less than or equal to 12 months) OR (number of months in DT2b is less than or equal to 12) OR (the difference between SP's current age and the age at DT2d is less than or equal to 1) OR DRIVES flag = 1 (yes), set DROVEINLASTYEAR flag = 1 (yes).

If DIDN'TLEAVE flag = 1 (yes), go to Section HA, HOUSEHOLD ACTIVITIES.
Else if DRIVES flag=1 (YES), go to DT3PRE.

Otherwise, go to DT4.

DT3PRE**DT3PRE****NOT ON FILE****QUESTION TEXT:**

Now I have some questions about driving situations people sometimes avoid.

PRESS 1 AND ENTER TO CONTINUE

DT3**dt1avoidriv1**

R1 DT3A AVOID DRIVING AT NIGHT

dt1avoidriv2

R1 DT3B AVOID DRIVING ALONE

dt1avoidriv3

R1 DT3C AVOID DRIVING HIGHWAYS

dt1avoidriv4

R1 DT3D AVOID DRIVING BAD WEATHR

DISPLAY INSTRUCTIONS:

If at DT3a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display response option 7. NO RAIN OR BAD WEATHER for DT3D only.

Use "Same Question Stem" display

QUESTION TEXT:

{[]}In the last month, did {you/SP} ever avoid driving{[]}

{variable text [a-d]}

RESPONSE 1[a] at night?

RESPONSE 2[b] alone?

RESPONSE 3[c] on busy roads or highways?

RESPONSE 4[d] in the rain or other bad weather?

CODES

- | | |
|---|---|
| 1 | YES |
| 2 | NO |
| 7 | NO, NO RAIN OR BAD WEATHER
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

DT4**dt1getoplcs1**

R1 DT4A SP WALKED GOT PLACES

dt1getoplcs2

R1 DT4B GOT RIDE FAM FRIEND PD

dt1getoplcs3

R1 DT4C VANSHUTTLE PROV BY PLACE

dt1getoplcs4

R1 DT4D VAN SHUTTLE FOR SENIORS

dt1getoplcs5

R1 DT4E SP TOOK PUBLIC TRANSPRT

dt1getoplcs6	R1 DT4F SP TOOK TAXI GOT PLACES
dt1getoplcs7	R1 DT4G GOT PLACES OTHR SPECIFY

DISPLAY INSTRUCTIONS:

If at DT4a, do not display question text in brackets.

Otherwise, display question text in brackets.

Display "else" if DRIVES flag =1 (yes).

For variable text [a], if WHEELCHAIR flag = 1 (yes) or SCOOTER flag = 1 (yes), display "or use {your/his/her}".

If WHEELCHAIR flag = 1(yes), display "wheelchair".

If SCOOTER flag = 1(yes), display "scooter".

If WHEELCHAIR flag =1(yes) and SCOOTER flag = 1 (yes), display "wheelchair or scooter".

If FACILITY flag = 1 (yes) or RETIREMENTCOMMUNITY flag = 1(yes), display item c and for variable text [d] display, "not provided by the place {you live/{he/she} lives}"

QUESTION TEXT:

{[]In the last month, how {else} did {you/SP} get to places outside {your/his/her}{home/building}? Did {you/he/she}{[]}

{variable text [a-g]}

RESPONSE 1 [a] walk {or use {your/his/her}} {wheelchair/ scooter/ wheelchair or scooter}?

RESPONSE 2 [b] get a ride from a family member, friend, or someone paid to help?

{RESPONSE 3 [c] use a van or shuttle service provided by the place {you live/{he/she} lives}?

RESPONSE 4 [d] use a van or shuttle service for seniors or people with disabilities {not provided by the place {you live/{he/she} lives}}?

RESPONSE 5 [e] take public transportation (the bus, subway, or train)?

RESPONSE 6 [f] take a taxi?

RESPONSE 7 [g] use any other way to get places?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

If DT4g = 1 (yes other ways), go to DT4H

Otherwise, go to BOX DT5A.

DT4H

DT4H

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER WAY OF GETTING AROUND

ENTER TEXT

Length

25

BOX DT5A

BOXDT5A

NOT ON FILE

DT4b = 1 (yes, ride from family, friend, or someone paid to help), go to DT5A.
Otherwise, go to Section HA - Household Activities.

DT5A

op1tkplhlp1

R1 DT5A TAKES SP PLACES MOST

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

Display "first" and "last" in underlined text

QUESTION TEXT:

In the last month, which family member, friend, or someone paid to help took {you/SP} places most often?

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

DT5b. [What is (his/her) first name?] CONFIRM SPELLING

DT5c. [What is (his/her) last name?] CONFIRM SPELLING

DT5d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN

26 STEPDAUGHTER'S SON/DAUGHTER
27 STEPSON'S SON/DAUGHTER
28 DAUGHTER-IN-LAW'S SON/DAUGHTER
29 SON-IN-LAW'S SON/DAUGHTER
30 BOARDER/RENTER
31 PAID AIDE/HOUSEKEEPER/EMPLOYEE
32 ROOMMATE
33 EX-WIFE/EX-HUSBAND
34 BOYFRIEND/GIRLFRIEND
35 NEIGHBOR
36 FRIEND
37 SERVICE/SOMEONE FROM THE PLACE SP LIVES
91 OTHER RELATIVE
92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For roster selection/addition at DT5A, set TOOK PLACES MOST OFTEN flag = 1 (yes).

Allow only one person to be selected/added to the roster for DT5A.

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

DT6

dt1otfrfamtk

R1 DT6 ANTH FND FAM MEM TOOK YOU

QUESTION TEXT:

Was there another friend or family member who took {you/SP} places in the last month?

CODES

1	YES	
2	NO	Section HA
	REFUSED	Section HA
	DON'T KNOW	Section HA

DT7A

op1tkplhlp2

R1 DT7A TAKES SP PLACES OTH

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

QUESTION TEXT:

Who was that (friend or family member who took {you/SP} places in the last month)?

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

DT7b. [What is (his/her) first name?] CONFIRM SPELLING

DT7c. [What is (his/her) last name?] CONFIRM SPELLING

DT7d. [What is (his/her) relationship to {you/SP}] PRESS F1 FOR HELP SCREEN

CODES

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

PROGRAMMER INSTRUCTIONS:

Allow one roster selection/addition. Set TOOK PLACES flag = 1 (yes) for selection/addition. Do not allow person selected/added at DT5A to be selected at DT7A.

If selection of person with TOOK PLACES MOST OFTEN flag=1(YES), display message "PERSON ALREADY SELECTED FOR TAKING SP PLACES MOST OFTEN. SELECT/ADD A DIFFERENT PERSON ON ROSTER"

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

Go to Section HA - Household Activities

Flag Variables set in DT Section

f11drives	R1 F DT SP DRIVES CAR
f11drvlstyr	R1 F DT SP DROVE CAR IN PAST YR

NHATS Round 1

Section HA [HOUSEHOLD ACTIVITIES]

Sequence: 23

HA1PRE

HA1PRE

NOT IN FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

HA1

ha1laun

R1 HA1 HOW LAUNDRY GOT DONE

DISPLAY INSTRUCTIONS:

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

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

If PROXY flag is null, display "1a".

If PROXY flag = 1 (yes), display "1b".

QUESTION TEXT:

SHOW CARD HA{1a/1b}

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

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

CODES

Code All That Apply

1	ALWAYS DID IT BY SELF	HA2
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA2
3	SOMEONE ELSE ALWAYS DID IT	HA3A
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	HA4
	REFUSED	HA5
	DON'T KNOW	HA5

HA1A

ha1launsIf

R1 HA1A DO LAUNDRY YOURSELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HA2

ha1whrmachi1	R1 HA2 WASH MACHINE IN HOME
ha1whrmachi2	R1 HA2 WASH MACHIN IN BUILDING
ha1whrmachi3	R1 HA2 WASH MACHIN LAUNDROMAT
ha1whrmachi4	R1 HA2 WASH MACHIN SINK IN HOME
ha1whrmachi5	R1 HA2 WASH MACH SINK IN BUILDNG
ha1whrmachi6	R1 HA2 WASH MACHIN OTHR SPECIFY

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display “or building”.
If FACILITY flag = 1 or STRUCTURE = 2 (multi-unit), display responses 2 and 5.

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES**Code All That Apply**

1	MACHINE IN HOME	BOX HA3A
2	{MACHINE ELSEWHERE IN BUILDING}	BOX HA3A
3	LAUNDROMAT	BOX HA3A
4	SINK IN HOME	BOX HA3A
5	{SINK ELSEWHERE IN BUILDING}	BOX HA3A
91	OTHER (SPECIFY)	
	REFUSED	BOX HA3A
	DON'T KNOW	BOX HA3A

HA2A**HA2A**

NOT IN FILE

SPECIFY WHERE {SP} DID LAUNDRY.

ENTER TEXT

Length

50

BOX HA3A**HA3A**

NOT IN FILE

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

HA3A**op1launhlp**

R1 HA3A HELPS SP WITH LAUNDRY

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

If HA1 = 2 (always with someone else) display "when {you/SP} did {your/{his/her}} laundry, who did that with {you/him/her}?"

If HA1 = 3 (someone else always did), display "who did {your/SP's} laundry for {you/{him/her}}".

If HA1 = 4 (varied) display "who did {your/SP's} laundry with {you/{him/her}} or for {you/{him/her}}".

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

QUESTION TEXT:

In the last month, {when {you/SP} did {your/{his/her}} laundry, who did that with {you/{him/her}}/who did {your/SP's} laundry for {you/{him/her}}/who did {your/SP's} laundry with {you/{him/her}} or for {you/{him/her}}?}

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA3b. [What is (his/her) first name?] CONFIRM SPELLING

HA3c. [What is (his/her) last name?] CONFIRM SPELLING

HA3d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES	Code All That Apply
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW

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

PROGRAMMER INSTRUCTIONS:

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

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

BOX HA4

BOXHA4

NOT IN FILE

If HA1 = 2 (always with someone else) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to HA6.

If HA1 = 3 (someone else always did) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA7.

If HA1 = 4 (varied) and HELPEDWITHLAUNDRY flag = 1 (YES) for SERVICE/SOMEONE FROM THE PLACE SP LIVES, go to BOX HA5.

Otherwise go to HA4.

HA4

ha1dlaunreas

R1 D LAUNDRY REASN WITH BY OTHER

DISPLAY INSTRUCTIONS:

If HA1 = 2 (always with someone else), display "with".

If HA1 = 3 (someone else always did), display "for".

If HA1 = 4 (varied), display "with or for".

If HA1 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns.

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES

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

PROGRAMMER INSTRUCTIONS:

If HA4 = (HEALTH OR FUNCTIONING), set HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes).

BOX HA5

BOXHA5

NOT IN FILE

If HA1a = 1 (yes by self), go to HA5.
If HA1 = 2 (always with someone else) or HA1a ≠ 1 (didn't do by self), go to HA6.
[If HA1 = 3 (someone else always did) or HA1 = 5 (not done in last month)] and
HEALTHREASONHELPWITHLAUNDRY flag = 1 (yes), go to BOX HA7.
Otherwise, go to HA2oPRE.

HA5

ha1laundif

R1 HA5 DIFF DOING LAUNDRY BY SELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HA6

ha1launoft

R1 HA6 HOW OFTEN DO LAUNDRY

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

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

CODES

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

BOX HA7

BOXHA7

NOT IN FILE

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

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

Otherwise, go to HA2oPRE.

HA7

ha1launwout

R1 HA7 EVER GO WOUT CLEAN LAUNDR

DISPLAY INSTRUCTIONS:

If HA1=1 (always did by self) or 5 (not done in last month) or HA1a = 1 (yes by self), display "it was too difficult to do by {yourself/himself/herself}".

Otherwise, display "no one was there to help or do that for {you/{him/her}}".

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without clean laundry because {it was too difficult to do by {yourself/himself/herself}/ no one was there to help or do that for {you/him/her}}?

CODES

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

HA2oPRE

HA2oPRE

NOT IN FILE

QUESTION TEXT:

The next few questions are about shopping for groceries or personal items.

IF NEEDED: By personal items, we mean things like toiletries that you can buy at the grocery or drug store.

PRESS 1 AND ENTER TO CONTINUE

HA20

ha1shop

R1 HA20 HOW YOUR SHOPPING DONE

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

SHOW CARD HA{1a/1b}

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

CODES

1	ALWAYS DID IT BY SELF	HA22
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA22
3	SOMEONE ELSE ALWAYS DID IT	HA25A
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	HA26
	REFUSED	HA27
	DON'T KNOW	HA27

HA20A

ha1shopslf

R1 HA20A EVER SHOP BY YOURSELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA22

ha1howpaygr1
ha1howpaygr2
ha1howpaygr3
ha1howpaygr4
ha1howpaygr5
ha1howpaygr6
ha1howpaygr7

R1 HA22 PAY GROC PERS ITMS CASH
R1 HA22 PAY GROC PERS ITMS CHCK
R1 HA22 PAY GROC PERS ITMS DEBIT
R1 HA22 PAY GROC PERS CREDIT
R1 HA22 PAY GROC PERS FOOD STMP
R1 HA22 PAY GROC PERS SMON ELS
R1 HA22 PAY GROC PERS OTHR SPEC

QUESTION TEXT:

SHOW CARD HA2

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

SELECT ALL THAT APPLY

CODES

- | | |
|----|--------------------|
| 1 | CASH |
| 2 | CHECK |
| 3 | DEBIT OR GIFT CARD |
| 4 | CREDIT CARD |
| 5 | FOOD STAMPS |
| 6 | SOMEONE ELSE PAYS |
| 91 | OTHER |
| | REFUSED |
| | DON'T KNOW |

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

DISPLAY INSTRUCTIONS:

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

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

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

DISPLAY “In the last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD HA3

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

SELECT ALL THAT APPLY

CODES

- | | | |
|---|--|-------|
| 1 | {DROVE} | HA24A |
| 2 | GOT A RIDE FROM A FAMILY MEMBER OR FRIEND
OR SOMEONE PAID TO HELP | HA24A |
| 3 | {USED A VAN OR SHUTTLE SERVICE PROVIDED BY | HA24A |

	THE PLACE SP LIVES}	
4	USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {{NOT PROVIDED BY THE PLACE SP LIVES}}	HA24A
5	TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM)	HA24A
6	TOOK A TAXI	HA24A
91	OTHER (SPECIFY) REFUSED DON'T KNOW	HA24A HA24A

HA23A

HA23A

NOT IN FILE

SPECIFY HOW GOT TO STORE.

ENTER TEXT

Length

50

HA24A

ha1shopcart

R1 HA24A EVER USE MOTORIZED CART

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, when {you/SP} went to the store to shop, did {you/{he/she}} ever use a motorized cart?

CODES

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

HA24B

ha1shoplean

R1 HA24B EVER LEAN ON SHOP CART

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

BOX HA25A

BOXHA25A

NOT IN FILE

If HA20 = 1 (always by self) go to HA27.
Otherwise, go to HA25A.

HA25A**op1shophlp****op1relatnshp**

R1 HA25A HELPS SP WITH SHOPPING

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

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

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

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

Display "first" and "last" in underlined text

QUESTION TEXT:

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

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA25b. [What is (his/her) first name?] CONFIRM SPELLING

HA25c. [What is (his/her) last name?] CONFIRM SPELLING

HA25d. [What is (his/her) relationship to {you/SP}] PRESS F1 FOR HELP SCREEN

CODES**Code All That Apply**

- | | |
|----|-----------------|
| 2 | SPOUSE/PARTNER |
| 3 | DAUGHTER |
| 4 | SON |
| 5 | DAUGHTER-IN-LAW |
| 6 | SON-IN-LAW |
| 7 | STEPDAUGHTER |
| 8 | STEPSON |
| 9 | SISTER |
| 10 | BROTHER |

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

PROGRAMMER INSTRUCTIONS:

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

BOX HA26

BOXHA26

NOT IN FILE

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

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

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

Otherwise go to HA26.

HA26

ha1dshopreas

R1 D SHOP REASN WITH BY OTHERS

DISPLAY INSTRUCTIONS:

If HA20 = 2 (always with someone else), display "with".
If HA20 = 3 (someone else always did), display "for".
If HA20 = 4 (varied), display "with or for".

If HA20 = 5 (not done in last month), use null display for first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns.

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES

- | | |
|---|--|
| 1 | HEALTH OR FUNCTIONING (INCLUDES AGE,
MEMORY, VISION, HEALTH CONDITION/DISEASE
NAMES, SURGERY, UNABLE TO DRIVE) |
| 2 | OTHER REASON (INCLUDES SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE
WANTED TO DO IT, PAY SOMEONE, DOESN'T LIK
TO DO IT)
REFUSED
DON'T KNOW |
- BOX HA27
BOX HA27

PROGRAMMER INSTRUCTIONS:

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

BOX HA27

BOXHA27

NOT IN FILE

If HA20a = 1 (yes by self), go to HA27.
If HA20 = 2 (always with someone else) or HA20a ≠ 1 (didn't do by self), go to HA28.

If [HA20 = 3 (someone else always did) or HA20 = 5 (not done in last month)] and
HEALTHREASONHELPWITHSHOPPING flag =1 (yes), go to BOX HA29.

Otherwise go to HA30PRE.

HA27

ha1shopdif

R1 HA27 DIFF SHOPPING BY SELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HA28**ha1shopoft**

R1 HA28 HOW OFT SHOP GROCERIES

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} shop for groceries or personal items more often, less often, or about the same?

CODES

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

BOX HA29**BOXHA29**

NOT IN FILE

If [HA20 = 1 (always by self) or HA20 = 4 (varied)] and [HA27 = 2 (a little) or HA27 = 3 (some) or HA27 = 4 (a lot)], go to HA29.

If [HA20 = 2 (always with someone else) or HA20 = 3 (some else always did) or HA20 = 4 (varied) or HA20 = 5 (not done in last month)] and [HEALTHREASONHELPWITHSHOPPING flag = 1 (yes) or HELPEDWITHSHOPPING flag = 1 (YES) for SERVICE/SOMONE FROM PLACE SP LIVES, go to HA29.

Otherwise go to HA30PRE.

HA29**ha1shopwout**

R1 HA29 EVER GO WITHOUT GROCRIES

DISPLAY INSTRUCTIONS:

If HA20=1 (always by self) or 5 (not done in last month), or HA20a = 1 (yes by self), display "it was too difficult to shop by {yourself/himself/herself}".

If HA20=2 (always with someone else) or 3 (someone else always did), display "no one was there to help or shop for {you/{him/her}}"?

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without groceries or personal items because {it was too difficult to shop by {yourself/himself/herself} / no one was there to help or shop for {you/{him/her}}}?

CODES

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

HA30PRE**HA30PRE**

NOT IN FILE

QUESTION TEXT:

Now let's turn to making hot meals.

PRESS 1 AND ENTER TO CONTINUE

HA3o**ha1meal**

R1 HA3o HOW HOT MEALS GET MADE

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} hot meals got made in the last month? Did {you/he/she} always make them by {yourself/himself/herself}, always make them together with someone else, did someone else always make them for {you/her/him}, or did it vary?

CODES

1	ALWAYS DID IT BY SELF	HA3oB
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA3oB
3	SOMEONE ELSE ALWAYS DID IT	HA3oB
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	HA33
	REFUSED	HA34
	DON'T KNOW	HA34

HA3oA**ha1mealslf**

R1 HA3oA MAKE HOT MEALS YOURSELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA3oB**ha1restamels**

R1 HA3oB OFTN HAV RESTARNT MEALS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display "Do not include meals provided as a service by the place {you live/he/she lives}."

QUESTION TEXT:

SHOW CARD HA4

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

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX HA31

BOXHA31

NOT IN FILE

If HA30 = 3 (SOMEONE ELSE ALWAYS DID IT), go to HA32A.

Else if HA14 = 1 (has microwave), go to HA31.

Otherwise, go to BOX HA32A

HA31

ha1oftmicrow

R1 HA31 OFTEN USE THE MICROWAVE

QUESTION TEXT:

SHOW CARD HA4

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

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX HA32A

BOXHA32A

NOT IN FILE

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

Otherwise, go to HA32A.

HA32A

op1mealhlp

R1 HA32A HELPS SP WITH MEALS

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

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

If HA30 = 2 (always with someone else), display "when {you/SP} made hot meals, who did that with {you/{him/her}}?"

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

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

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

QUESTION TEXT:

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

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA32b. [What is (his/her) first name?] CONFIRM SPELLING

HA32c. [What is (his/her) last name?] CONFIRM SPELLING

HA32d. [What is (his/her) relationship to {you/SP}?:] PRESS F1 FOR HELP SCREEN

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

25 COUSIN
26 STEPDAUGHTER'S SON/DAUGHTER
27 STEPSON'S SON/DAUGHTER
28 DAUGHTER-IN-LAW'S SON/DAUGHTER
29 SON-IN-LAW'S SON/DAUGHTER
30 BOARDER/RENTER
31 PAID AIDE/HOUSEKEEPER/EMPLOYEE
32 ROOMMATE
33 EX-WIFE/EX-HUSBAND
34 BOYFRIEND/GIRLFRIEND
35 NEIGHBOR
36 FRIEND
37 SERVICE/SOMEONE FROM THE PLACE SP LIVES
91 OTHER RELATIVE
92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

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

BOX HA33

BOXHA33

NOT IN FILE

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

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

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

Otherwise go to HA33.

HA33

ha1dmealreas

R1 D MEALS REASN WITH BY OTHERS

DISPLAY INSTRUCTIONS:

If HA30 = 2 (always with someone else), display "with".

If HA30 = 3 (someone else always did), display "for".

If HA30 = 4 (varied), display "with or for".

If HA30 = 5 (none made in last month), do not display first sentence.

Display "HEALTH OR FUNCTIONING" and "OTHER REASON" in underlined text.

Display responses in two side-by-side columns.

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES

1

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

2

OTHER REASON (INCLUDES SHARED ACTIVITY,
ALWAYS DONE THIS WAY, SOMEONE ELSE WANTED
TO DO IT, PAY SOMEONE, DOESN'T LIKE TO DO IT)
REFUSED
DON'T KNOW

BOX HA34
BOX HA34

PROGRAMMER INSTRUCTIONS:

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

BOX HA34

BOXHA34

NOT IN FILE

If HA30a = 1 (yes by self), go to HA34.
If HA30 = 2 (always with someone else) or HA30a ≠ 1 (didn't do by self), go to HA35.

If [HA30 = 3 (someone else always did) or HA30 = 5 (not done in last month)] and
HEALTHREASONHELPWITHMEALS flag = 1 (yes), go to BOX HA36.

Otherwise, go to HA40PRE.

HA34

ha1mealdif

R1 HA34 DIFICULTY MAK MEALS SELF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have making hot meals by {yourself/himself/herself}?
Would you say none, a little, some, or a lot?

CODES

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

HA35

ha1mealoft

R1 HA35 HOW OFTEN MAKE HOT MEALS

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

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

CODES

1	MORE OFTEN
2	LESS OFTEN
3	SAME
	REFUSED

DON'T KNOW

BOX HA36**BOXHA36****NOT IN FILE**

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

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

Otherwise go to HA40PRE.

HA36**ha1mealwout****R1 HA36 EVER GO WITHOUT HOT MEAL****DISPLAY INSTRUCTIONS:**

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

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

Display "in the last month" in underlined text.

QUESTION TEXT:

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

CODES

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

HA40PRE**HA40PRE****NOT IN FILE****QUESTION TEXT:**

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

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

PRESS 1 AND ENTER TO CONTINUE

HA40**ha1bank****R1 HA40 HOW BILLS BANKIN HANDLED****DISPLAY INSTRUCTIONS:**

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

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

QUESTION TEXT:

SHOW CARD HA{1a/1b}

Which answer best describes how {your/SP's} bills and banking were handled in the last month? Did {you/he/she} always do this by {yourself/himself/herself}, always do it together with someone else, did someone else always do it for {you/him/her}, or did it vary?

CODES

1	ALWAYS DID IT BY SELF	HA44
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	HA42A
3	SOMEONE ELSE ALWAYS DID IT	HA42A
4	IT VARIED (MORE THAN ONE WAY)	
5	NOT DONE IN LAST MONTH	BOX HA43
	REFUSED	BOX HA44
	DON'T KNOW	BOX HA44

HA40A

ha1bankslf

R1 HA40A HNDL BILLS BNKING YRSLF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, did {you/SP} ever handle {your/their} bills and banking by {yourself/himself/herself}?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

HA42A

op1bankhlp
op1relatnshp

R1 HA42A HELPS SP WITH BANKING

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

If HA40 = 2 (always with someone else), display "when {you/SP} handled bills and banking, who did that with

{you/{him/her}}”.

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

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

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

QUESTION TEXT:

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

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA42b. [What is (his/her) first name?] CONFIRM SPELLING

HA42c. [What is (his/her) last name?] CONFIRM SPELLING

HA42d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES Code All That Apply

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER

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

PROGRAMMER INSTRUCTIONS:

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

BOX HA43

BOXHA43

NOT IN FILE

If HA40 = 2 (always with someone else) HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to HA45.

If HA40 = 3 (someone else always did) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA46.

If HA40 = 4 (varied) and HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX HA44.

Otherwise go to HA43.

HA43

ha1dbankreas

R1 D BANK BILL REASON WITHBY OTH

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

SELECT ALL THAT APPLY

CODES

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

 2 OTHER REASON (INCLUDES SHARED ACTIVITY,
 ALWAYS DONE THIS WAY, SOMEONE ELSE
 WANTED TO DO IT, PAY SOMEONE, DOESN'T LIKE
 TO DO IT)

REFUSED
DON'T KNOW

BOX HA44
BOX HA44

PROGRAMMER INSTRUCTIONS:

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

BOX HA44

BOXHA44

NOT IN FILE

If HA40a = 1 (yes by self), go to HA44.
If HA40 = 2 (always with someone else) or HA40a ≠1 (didn't do by self), go to HA45.

If [HA40 = 3 (someone else always did) or HA40 = 5 (not done in last month)] and
HEALTHREASONHELPWITHBANKING flag =1 (yes), go to BOX HA46.

Otherwise, go to HA50PRE.

HA44

ha1bankdif

R1 HA44 DIF HNDL BLLS BNKING SLF

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

CODES

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

HA45

ha1bankoft

R1 HA45 HOW OFTEN YOU PAY BILLS

DISPLAY INSTRUCTIONS:

Display "a year ago" in bold underlined text.

QUESTION TEXT:

Compared to a year ago, {do you/does SP} handle {your/his/her} own bills and banking more often, less often, or about the same?

CODES

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

BOX HA46

BOXHA46

NOT IN FILE

If [HA40 = 1 (always by self) or HA40 = 4 (varied)] and [HA44 = 2 (a little) or HA44 = 3 (some) or HA44 = 4 (a lot)], go to HA46.

If [HA40 = 2 (always with someone else) or HA40 = 3 (some else always did) or HA40 = 4 (varied) or HA40 = 5 (not done in last month)] and [HEALTHREASONHELPWITHBANKING flag = 1 (yes) or HELPEDWITHBANKING flag = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to HA46.

Otherwise go to HA50PRE.

HA46

ha1bankwout

R1 HA46 EVER GO WOUT PAYIN BILLS

DISPLAY INSTRUCTIONS:

If HA40=1 (always by self) or 5 (not done in last month) or HA40a = 1 (yes by self), display "it was too difficult to do that by {yourself/himself/herself}".

If HA40=2 (always with someone else) or 3 (someone else always did), display "no one was there to help or do that for {you/{him/her}}".

Display "in the last month" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever go without handling {your/his/her} bills and banking matters because {it was too difficult to do that by {yourself/himself/herself}/ no one was there to help or do that for {you/{him/her}}}?

CODES

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

HA50PRE

HA50PRE

NOT IN FILE

QUESTION TEXT:

Now let's turn to less common money matters, such as opening, closing or cashing in CDs, checking, money market or retirement accounts, or applying for loans.

PRESS 1 AND ENTER TO CONTINUE

HA50

ha1money

R1 HA50 MONEY MATTERS TO HANDLE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

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

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

CODES

1	YES	
2	NO	SECTION SC
	REFUSED	SECTION SC
	DON'T KNOW	SECTION SC

HA51**ha1moneyhlp**

R1 HA51 ANYONE HLP W MONY MATTRS

DISPLAY INSTRUCTIONS:

If FACILITY flag = 1 (yes), display "a service provided by the place where {you live/SP lives},"

Display "in the last year" in bold underlined text

QUESTION TEXT:

In the last year, did anyone help {you/SP} or handle these kinds of money matters for {you/{him/her}}? This includes family, friends, {a service provided by the place where {you live/{he/she} lives},} or someone paid to help {you/{him/her}}.

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

CODES

1	YES	
2	NO	SECTION SC
	REFUSED	SECTION SC
	DON'T KNOW	SECTION SC

HA52A**op1moneyhlp**

R1 HA52A HELPS SP WITH MONEY

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

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

QUESTION TEXT:

Who was that?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

HA52b. [What is (his/her) first name?] CONFIRM SPELLING

HA52c. [What is (his/her) last name?] CONFIRM SPELLING

HA52d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES	Code All That Apply
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSISTER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

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

For each roster selection/addition at HA52, set HELPEDWITHMONEYMATERS flag=1(yes).

Go to Section SC- Self-care Activities

Derived Variables from Items in the HA Section

ha1dlaunsfdf	R1 D LAUNDRY SELF AND DIFF LEVEL
ha1dshopsfdf	R1 D SLF SHOPPING AND DIFF LEVEL
ha1dmealsfdf	R1 D SELF MEALS AND DIFF LEVEL
ha1dbanksfdf	R1 D SELF BANKS AND DIFF LEVEL
ha1dmealwhl	R1 D HELPER IS MEALS ON WHEELS
ha1dmealkot	R1 D HELPER IS RESTAURNT TAKEOUT
ha1dlaunreas	R1 D LAUNDRY REASN WITH BY OTHERS [See HA4]
ha1dshopreas	R1 D SHOP REASN WITH BY OTHERS [See HA26]
ha1dmealreas	R1 D MEALS REASN WITH BY OTHERS [See HA33]
ha1dbankreas	R1 D BANK BILL REASON WITHBY OTH [See HA43]

NHATS Round 1

Section SC [SELF-CARE ACTIVITIES]

Sequence: 24

SC1PRE

SC1PRE

NOT ON FILE

QUESTION TEXT:

Now I have a few questions about how {you eat/SP eats}.

PRESS 1 AND ENTER TO CONTINUE

SC1

sc1eatdev

R1 SC1 EVER USE ADAPTED UTENSILS

DISPLAY INSTRUCTIONS:

Display “adapted” in bold underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever use adapted utensils to help {you/{him/her}} eat or cut {your/{his/her}} food?

IF NEEDED: Adapted utensils include things like easy-to-grip silverware, knives that rock, and plates with high sides.

CODES

1	YES	
2	NO	SC3
7	ALWAYS FED THROUGH IV OR TUBE	SC7PRE
	REFUSED	SC3
	DON'T KNOW	SC3

SC2

sc1eatdevoft

R1 SC2 OFTEN USE ADAPTED UTENSLS

QUESTION TEXT:

SHOW CARD SC1

Did {you/SP} use adapted utensils every time {you/{he/she}} had a meal, most times, sometimes, or rarely?

CODES

1	EVERY TIME
2	MOST TIMES
3	SOMETIMES
4	RARELY
	REFUSED
	DON'T KNOW

SC3

sc1eathlp

R1 SC3 DID ANYONE HELP YOU EAT

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} eat, for instance, by cutting up food or feeding {you/{him/her}}?

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

CODES

1	YES	
2	NO	SC5
	REFUSED	SC5
	DON'T KNOW	SC5

SC3A

op1eathlp

R1 SC3A HELPS SP WITH EATING

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

QUESTION TEXT:

Who helped {you/SP} eat?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

SC3b. [What is (his/her) first name?] CONFIRM SPELLING

SC3c. [What is (his/her) last name?] CONFIRM SPELLING

SC3d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

Code All That Apply

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

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC3, set HELPSWITHEATING flag = 1 (yes).

SC4

sc1eatslfoft

R1 SC4 HOW OFTEN EAT BY YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month when {you/SP} ate, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	BOX SC6
	REFUSED	BOX SC6
	DON'T KNOW	BOX SC6

SC5

sc1eatslfdif

R1 SC5 DIFFICULTY EATING BY SELF

DISPLAY INSTRUCTIONS:

If SC1 = 1 (used adapted utensils), display "when {you/SP} used adapted utensils,".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used adapted utensils,} how much difficulty did {you/{he/she}} have eating by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

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

BOX SC6

BOXSC6

NOT ON FILE

If SC3 = 2 (no help with eating) and SC5 = 1 (no difficulty eating), go to SC7PRE.

Otherwise, continue with SC6.

SC6

sc1eatwout

R1 SC6 GO WOUT EAT BECSE NO HELP

DISPLAY INSTRUCTIONS:

If SC4 = 4 (never ate by self w/out help), display "no one was there to help"

Otherwise, display "it was too difficult to feed {yourself/{himself/herself}}".

QUESTION TEXT:

In the last month, did {you/SP} ever go without eating because {no one was there to help/it was too difficult to feed {yourself/{himself/herself}}}?{}

CODES

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

SC7PRE

SC7PRE

NOT ON FILE

QUESTION TEXT:

Now I have a few questions about how {you get/SP gets} cleaned up.

PRESS 1 AND ENTER TO CONTINUE

SC7

sc1showrbat1

R1 SC7 SP SHOWERED

sc1showrbat2

R1 SC7 SP TOOK BATHS IN A TUB

sc1showrbat3

R1 SC7 SP WASHED SOME OTHR WAY

QUESTION TEXT:

In the last month, how did {you/SP} usually clean {yourself/himself/herself} up? By taking a shower, bathing in a tub, or washing up some other way?

IF NEEDED: Do not include whirlpool baths {you take/{he/she} takes} for therapy.

SELECT ALL THAT APPLY

CODES	Code All That Apply
1	SHOWERED
2	TOOK BATHS IN A TUB
3	WASHED UP SOME OTHER WAY
	REFUSED
	DON'T KNOW

SC16PRE

SC16PRE

PROGRAMMER INSTRUCTIONS:

If SC7 = 1 (showered) and SC7 ≠ 2 (took baths) and SC7 ≠ 3 (washed up), set SHOWERING flag = 1 (yes).
If SC7 = 2 (took baths) and SC7 ≠ 1 (showered) and SC7 ≠ 3 (washed up), set TAKINGBATHS flag = 1 (yes).
If SC7 = 3 (washed up) and SC7 ≠ 1 (showered) and SC7 ≠ 2 (took baths), set WASHINGUP flag = 1 (yes).

BOX SC8

BOXSC8

NOT ON FILE

If more than one response to SC7, go to SC8.

Otherwise, go to BOX SC9.

SC8

sc1prfrshbth

R1 SC8 PREFER SHOWR BATH OR OTHR

DISPLAY INSTRUCTIONS:

If SC7 = 1 (showered), display "showering" and response option 1.
If SC7 = 2 (took baths), display "taking baths" and response option 2.
If SC7 = 3 (washed up), display "washing up some other way" and response option 3.
Display "or" between methods of cleaning up.

QUESTION TEXT:

In the last month, which did {you/SP} do most often: {showering / taking baths / washing up some other way}?

CODES

1	SHOWERING
2	TAKING BATHS
3	WASHING UP SOME OTHER WAY

PROGRAMMER INSTRUCTIONS:

If SC8 = 1 (showering), set SHOWERING flag = 1 (yes).
If SC8 = 2 (taking baths), set TAKINGBATHS flag = 1 (yes).
If SC8 = 3 (washing up), set WASHINGUP flag = 1 (yes).

BOX SC9

BOXSC9

NOT ON FILE

If BATHGRABBAR = 1 (yes) and [SHOWERING flag = 1 (yes) or TAKINGBATHS flag = 1 (yes)], go to SC9.

Otherwise, go to BOX SC10.

SC9**sc1scusgrbrs**

R1 SC9 HOW OFTEN USE GRAB BARS

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “showered”.

If TAKINGBATHS flag = 1 (yes), display “took a bath”.

QUESTION TEXT:

SHOW CARD SC3

In the last month, did {you/SP} use grab bars every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
| 2 | MOST TIMES |
| 3 | SOMETIMES |
| 4 | RARELY |
| 5 | NEVER |
| | REFUSED |
| | DON'T KNOW |

BOX SC10**BOXSC10**

NOT ON FILE

If BATHSEAT flag = 1 (yes) and [SHOWERING flag = 1 (yes) or TAKINGBATHS flag = 1 (yes)], go to SC10.

Otherwise, go to SC11.

SC10**sc1shtubseat**

R1 SC10 OFTN USE SHOWR TUB SEAT

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display “showered”.

If TAKINGBATHS flag = 1 (yes), display “took a bath”.

QUESTION TEXT:

SHOW CARD SC3

In the last month, did {you/SP} use the shower or tub seat every time {you/{he/she}} {showered/ took a bath}, most times, sometimes, rarely, or never?

IF NEEDED: A shower or tub seat is a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.

CODES

- | | |
|---|------------|
| 1 | EVERY TIME |
|---|------------|

2 MOST TIMES
3 SOMETIMES
4 RARELY
5 NEVER
REFUSED
DON'T KNOW

SC11**sc1bathhlp**

R1 SC11 ANYN HLP SHOWR BATH OTHR

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display "shower".
If TAKINGBATHS flag = 1 (yes), display "take a bath".
If WASHINGUP flag = 1 (yes), display "wash up".

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} {shower/ take a bath/ wash up}?

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

CODES

1	YES	
2	NO	SC13
	REFUSED	SC13
	DON'T KNOW	SC13

SC11A**op1bathhlp**

R1 SC11A HELPS SP WITH BATHING

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display "shower".
If TAKINGBATHS flag = 1 (yes), display "take a bath".
If WASHINGUP flag = 1 (yes), display "wash up".

Display HELPER RELATIONSHIP CODES.

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

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

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

QUESTION TEXT:

Who helped {you/SP} {shower/take a bath/wash up}?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

- SC11b. [What is (his/her) first name?] CONFIRM SPELLING
SC11c. [What is (his/her) last name?] CONFIRM SPELLING
SC11d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES Code All That Apply

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC11, set HELPSWITHBATHING flag = 1 (yes).

SC12

sc1bathoft

R1 SC12 HOW OFTEN BATHE YOURSELF

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display "showered".

If TAKINGBATHS flag = 1 (yes), display "took a bath".
If WASHINGUP flag = 1 (yes), display "washed up".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP} {showered/ took a bath/ washed up}, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	SC14
	REFUSED	SC14
	DON'T KNOW	SC14

SC13

sc1bathdif

R1 SC13 DIFF USING BARS OR SEATS

DISPLAY INSTRUCTIONS:

If SC9 = 1, 2, 3, or 4 (used bath grab bars every time, most times, sometimes, or rarely) or SC10 = 1, 2, 3, or 4 (used bath seat every time, most times, sometimes, or rarely), display "{when {you/SP} used {your/{his/her}}}".

If SC9 = 1, 2, 3, or 4 and SC10 = 1, 2, 3, or 4, display "grab bars or shower or tub seat".

Else if SC9 = 1, 2, 3, or 4, display "grab bars".

Else if SC10 = 1, 2, 3, or 4, display "shower or tub seat".

If SHOWERING flag = 1 (yes), display "showering".

If TAKINGBATHS flag = 1 (yes), display "taking a bath".

If WASHINGUP flag = 1 (yes), display "washing up".

If SC9 = 1, 2, 3, or 4, display "A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks."

If SC10 = 1, 2, 3, or 4, display "A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in."

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used {your/{his/her}}} {grab bars/shower or tub seat/grab bars or shower or tub seat} how much difficulty did {you/{he/she}} have {showering/ taking a bath/ washing up} by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

IF NEEDED: {A grab bar is designed to help you steady yourself. It may be attached to the wall or built into the shower or tub. Do not include towel racks.} {A shower or tub seat includes a chair, stool, or bench used in the shower or bathtub. Some seats are placed in the shower or tub, others are built in.}

CODES

1	NONE
2	A LITTLE

3 SOME
4 A LOT
REFUSED
DON'T KNOW

SC14

sc1bathyrgo

R1 SC14 BATHE MRE OFT THN YR AGO

DISPLAY INSTRUCTIONS:

If SHOWERING flag = 1 (yes), display "shower".
If TAKINGBATHS flag = 1 (yes), display "take baths".
If WASHINGUP flag = 1 (yes), display "wash up".

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now {shower/ take baths/ wash up} more often, less often, or about the same?

CODES

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

BOX SC15

BOXSC15

NOT ON FILE

If SC11 = 2 (no help cleaning up) and SC13 = 1 (no difficulty cleaning up), go to SC16PRE.

Otherwise go to SC15.

SC15

sc1bathwout

R1 SC15 EVER GO WITHOUT WASHING

DISPLAY INSTRUCTIONS:

If SC12 = 4 (never cleaned up by self), display "no one was there to help".
Otherwise, display "it was too difficult to do that by {yourself/{himself/herself}}".

If SHOWERING flag = 1 (yes), display "showering".
If TAKINGBATHS flag = 1 (yes), display "taking a bath".
If WASHINGUP flag = 1 (yes), display "washing up".

QUESTION TEXT:

In the last month, did {you/SP} ever go without {showering/ taking a bath/ washing up} because {no one was there to help /it was too difficult to do that by {yourself/{himself/herself}}}?

CODES

1 YES
2 NO
REFUSED
DON'T KNOW

Now I have a few questions about using the toilet.

IF NEEDED: These questions may seem a bit personal, but they are very important for research on aging and health trends.

PRESS 1 AND ENTER TO CONTINUE

SC16**sc1usvarto1**

R1 SC16 SP USED PORTABLE COMMODE

sc1usvarto2

R1 SC16 SP USED PADS UNDERGMT

sc1usvarto3

R1 SC16 USED GRABBARS FR TOILET

sc1usvarto4

R1 SC16 USED RAISED TOILET SEAT

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

If at SC16a, do not display question text in brackets.

Otherwise, display question text in brackets.

For SC16a, if IS3 = 1 (SP is male), display ", portable urinal,".

For SC16d, if IS3 = 1 (SP is male), display ", portable urinals,".

If TOILETGRABBAR flag = 1 (yes), display variable text {c}.

If RAISEDTOILET flag = 1 (yes), display variable text {d}.

QUESTION TEXT:

{[{}In the last month, {have you/has SP} ever used{[]}}

{variable text [a-d]}

RESPONSE [1] a. a portable commode{, portable urinal,} or bedpan?

RESPONSE [2] b. disposable pads or undergarments to help prevent accidentally wetting or soiling {your/{his/her}} clothes?

{RESPONSE [3] c. grab bars around the toilet?

IF NEEDED: A grab bar is designed to help you steady yourself. It may be attached to the wall or part of a frame that goes over the toilet. Do not include towel racks.}

{RESPONSE [4] d. a raised toilet or raised toilet seat?

IF NEEDED: This includes a toilet seat that is elevated higher than usual, either because the toilet or the seat is raised, or a seat with arms that fits over the toilet. Do not include portable commodes{, portable urinals,} or bedpans.}

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

SC17**sc1toilhlp**

R1 SC17 ANYON HLP YOU USE TOILET

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} use the toilet?

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

CODES

1	YES	SC19
2	NO	SC19
	REFUSED	SC19
	DON'T KNOW	SC19

SC17A**op1toilhlp**

R1 SC17A HELPS SP WITH TOILETING

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

QUESTION TEXT:

Who helped {you/SP} use the toilet?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

SC17b. [What is (his/her) first name?] CONFIRM SPELLING

SC17c. [What is (his/her) last name?] CONFIRM SPELLING

SC17d. [What is (his/her) relationship to {you/SP}?] [PRESS F1 FOR HELP SCREEN]

CODES**Code All That Apply**

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC17, set HELPSWITHTOILETING flag = 1 (yes).

SC18

sc1toiloft

R1 SC18 OFTEN USE TOILET BY SELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP} used the toilet, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	SC20
	REFUSED	SC20
	DON'T KNOW	SC20

SC19**sc1toildif****R1 SC19 DIFFICUTY WITH GRAB BARS****DISPLAY INSTRUCTIONS:**

If SC16c = 1 (used toilet grab bars) or SC16d = 1 (used raised toilet), display "when {you/SP} used the {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat},".

If SC16c = 1 (used toilet grab bars) and SC16d = 1 (used raised toilet), display "grab bars or raised toilet or raised toilet seat"

Else if SC16c = 1 (used toilet grab bars), display "grab bars".

Else if SC16d = 1 (used raised toilet), display "raised toilet or raised toilet seat".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used the} {grab bars/raised toilet or raised toilet seat/grab bars or raised toilet or raised toilet seat}, how much difficulty did {you/{he/she}} have using the toilet by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

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

BOX SC20**BOXSC20****NOT ON FILE**

If SC17 = 2 (no help) and SC19 = 1 (no difficulty), go to SC21PRE.

Otherwise go to SC20.

SC20**sc1toilwout****R1 SC20 ACCIDENT WET SOIL CLTHES****DISPLAY INSTRUCTIONS:**

If SC18= 4 (never used toilet by self), display "no one was there to help {you/{him/her}} get to or use the toilet".

Otherwise, display "it was too difficult to get to or use the toilet by {yourself/{himself/herself}}".

QUESTION TEXT:

In the last month, did {you/SP} ever accidentally wet or soil {your/{his/her}} clothes because {no one was there to help {you/{him/her}} get to or use the toilet/it was too difficult to get to or use the toilet by {yourself/{himself/herself}}?}

CODES

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

DON'T KNOW

SC21PRE

SC21PRE

NOT ON FILE

The next few questions are about getting dressed. By getting dressed we mean changing out of the clothes {you/SP} slept in.

PRESS 1 AND ENTER TO CONTINUE

SC21

sc1dresoft

R1 SC21 OFTEN YOU GET DRESSED

QUESTION TEXT:

SHOW CARD SC4

In the last month, did {you/SP} get dressed every day, most days, some days, rarely, or never?

CODES

- | | | |
|---|------------------------------|----------|
| 1 | EVERY DAY (7 DAYS A WEEK) | |
| 2 | MOST DAYS (5-6 DAYS A WEEK) | |
| 3 | SOME DAYS (2-4 DAYS A WEEK) | |
| 4 | RARELY (ONCE A WEEK OR LESS) | |
| 5 | NEVER | BOX SC27 |
| | REFUSED | BOX SC27 |
| | DON'T KNOW | BOX SC27 |
-

SC22

sc1dresdev

R1 SC22 USE SPECL ITEMS TO DRESS

QUESTION TEXT:

In the last month, did {you/SP} use any special items to get dressed, such as a button hook, reacher or grabber, or clothes that are designed to get on and off easily?

CODES

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

SC23

sc1dresshp

R1 SC23 ANYONE HELP GET DRESSED

DISPLAY INSTRUCTIONS:

If IS3 = 2 (SP is female), display "or bra".

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

DISPLAY "In the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did anyone ever help {you/SP} get dressed, for instance, by getting clothing over {your/{his/her}} head, helping with clothing behind {your/{his/her}} back like a belt {or bra}, or helping {you/{him/her}} put on socks or shoes?

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

CODES

1	YES	
2	NO	SC25
	REFUSED	SC25
	DON'T KNOW	SC25

SC23A

op1dreshlp

R1 SC23A HELPS SP WITH DRESSING

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

QUESTION TEXT:

Who helped {you/SP} get dressed?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

SC23b. [What is (his/her) first name?] CONFIRM SPELLING

SC23c. [What is (his/her) last name?] CONFIRM SPELLING

SC23d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES

Code All That Apply

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

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at SC23, set HELPSWITHDRESSING flag = 1 (yes).

SC24

sc1dresslf

R1 SC24 OFTEN YOU DRESS YOURSELF

DISPLAY INSTRUCTIONS:

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD SC2

In the last month, when {you/SP} got dressed, how often did {you/{he/she}} do this by {yourself/{himself/herself}} and without help? Would you say most times, sometimes, rarely, or never?

CODES

1	MOST TIMES	
2	SOMETIMES	
3	RARELY	
4	NEVER	SC26
	REFUSED	SC26
	DON'T KNOW	SC26

SC25

sc1dresdif

R1 SC25 DIF WHN US SP ITMS YRSLF

DISPLAY INSTRUCTIONS:

If SC22 = 1 (yes, used special items), display "when {you/SP} used special items to help {you/{him/her}} get dressed,".

DISPLAY "by {yourself/{himself/herself}} and without help" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, {when {you/SP} used special items to help {you/{him/her}} get dressed,} how much difficulty did {you/{he/she}} have getting dressed by {yourself/{himself/herself}} and without help? Would you say none, a little, some, or a lot?

CODES

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

SC26

sc1dresyrgo

R1 SC26 HOW OFTN YOU GET DRESSED

DISPLAY INSTRUCTIONS:

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} now get dressed more often, less often, or about the same?

CODES

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

BOX SC27

BOXSC27

NOT ON FILE

If SC23 = 2 (did not get help) and SC25 = 1 (no difficulty), go to Section DS – Duration of Self Care Accommodations.

Otherwise go to SC27.

SC27

sc1dreswout

R1 SC27 GO WITHOUT GTNG DRESSED

DISPLAY INSTRUCTIONS:

If SC24 = 4 (never dressed by self), display "there was no one there to help".

Otherwise, display "it was too difficult to dress by {yourself/{himself/herself}}".

QUESTION TEXT:

In the last month, did {you/SP} ever go without getting dressed because {there was no one there to help /it was too difficult to dress by {yourself/{himself/herself}}?}

CODES

- | | |
|---|-----|
| 1 | YES |
|---|-----|

PROGRAMMER INSTRUCTIONS:

Go to Section DS – Duration of Self Care Accommodations

Derived Variables from Items in SC Section	
sc1deatdevi	R1 D USES DEVICES WHILE EATING
sc1deathelp	R1 D HAS HELP EATING
sc1deatsfdf	R1 D DIFF EATING BY SELF WO HELP
sc1dbathdevi	R1 D USES DEVICES WHILE BATHING
sc1dbathhelp	R1 D HAS HELP WHILE BATHING
sc1dbathsfdf	R1 D DIFF BATHING SELF NO HELP
sc1dtoildevi	R1 D USES DEVICE WHILE TOILETING
sc1dtoilhelp	R1 D HAS HELP WHILE TOILETING
sc1dtoilsfdf	R1 D DIFF LEVEL TOILETING SELF
sc1ddresdevi	R1 D USES DEVICES WHILE DRESSING
sc1ddreshelp	R1 D HAS HELP WHILE DRESSING
sc1ddressfdf	R1 D DIFF LEVEL DRESSING SELF

Flag variables set in SC Section	
f1showering	R1 F SC SP USES SHOWER
f1takingbth	R1 F SC SP TAKES BATHS
f1washingup	R1 F SC SP WASHES OTHER WAY

NHATS Round 1

Section DS [DURATION OF SELF CARE ACCOMMODATIONS] Sequence: 25

BOX DS **BOXDS1** NOT ON FILE

If SC3, SC11, SC17, SC23=2 (NO), RF, or DK, go to DS1.
Otherwise, go to DS2.

DS1 **ds1gethlpeat** R1 DS1 GET HELP WITH EATING, ETC

DISPLAY INSTRUCTIONS:

Display "last year" in bold underlined text.

QUESTION TEXT:

In the last year, did {you/SP} ever get help with eating, getting cleaned up, using the toilet, or getting dressed?

CODES

1	YES	DS3B
2	NO	BOX DS4
	REFUSED	BOX DS4
	DON'T KNOW	BOX DS4

DS2 **ds1hpmrtnyr** R1 DS2 GET HELP FOR YEAR OR MORE

DISPLAY INSTRUCTIONS:

If SC3=1 (YES), display "eating".
If SC11=1(YES), display "getting cleaned up"
If SC17=1 (YES), display "using the toilet"
If SC23=1 (YES), display "getting dressed"

If more than one activity displayed, display "or" between each one.

QUESTION TEXT:

{Have you/Has SP} been getting help with {eating}{getting cleaned up}{using the toilet}{getting dressed} for a year or more?
IF NEEDED: {Were you/Was SP} getting help before {CURRENT MONTH AND YEAR - 1 YEAR}?

CODES

1	YES, A YEAR OR MORE	DS3B
2	NO, LESS THAN A YEAR	BOX DS4
	REFUSED	BOX DS4
	DON'T KNOW	BOX DS4

DS3A**ds1yrsgethlp**

R1 DS3A HOW MANY YRS GETTING HLP

DISPLAY INSTRUCTIONS:

If only one activity displayed at DS2, display “that”.
If more than one activity displayed at DS2, display “any of these activities”.

QUESTION TEXT:

About how many years {have you/has SP} been getting help with {that/any of these activities}?

ENTER NUMBER OF YEARS

ENTER 997 IF GETTING HELP SINCE BIRTH/ENTIRE LIFE.

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 50
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 1-120 or 997.
Soft range: 1-50.
Go to BOX DS4.

DS3B**ds1mthgethlp**

R1 DS3B MNTH FIRST/LAST GET HELP

DISPLAY INSTRUCTIONS:

If DS1 = 1 (help in last year), display “last” and “any of these activities”.
If DS2 = 2 (help for less than a year) and only one activity displayed at DS2, display “first” and “that”.
If DS2 = 2 (help for less than a year) and more than one activity displayed at DS2, display “first” and “any of these activities”.

QUESTION TEXT:

In what month since {CURRENT MONTH AND YEAR – 1 YEAR} did {you/SP} {first/last} get help with {that/any of these activities}?

CODES

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

BOX DS4

BOXDS4

NOT ON FILE

If {AGE on PERSON ROSTER} = 65, go to Section MC – Medical Care Activities.
Else if DS3a= 997 (HELP WITH ACTIVITIES ENTIRE LIFE), go to Section MC – Medical Care Activities.
Else if {AGE on PERSON ROSTER} – {NUMBER OF YEARS from DS3A} ≤ 65, go to Section MC – Medical Care Activities.
Otherwise, go to DS4PRE.

DS4PRE

DS4PRE

NOT ON FILE

Now think about the time around when {you/SP} turned 65.

PRESS 1 AND ENTER TO CONTINUE

DS4

ds1gthptrn65

R1 DS4 GET HLP ARND TIME TRND 65

QUESTION TEXT:

{Were you/Was SP} getting help with eating, getting cleaned up, using the toilet, or getting dressed around the time when {you/he/she} turned 65?

CODES

1	YES	SECTION MC
2	NO	
	REFUSED	
	DON'T KNOW	

BOX DS5

BOXDS5

NOT ON FILE

If DS2 = 1 (help for year or more) or 2 (help for less than a year) or DS1 = 1 (help in last year), go to Section MC – Medical Care Activities.
Else, go to DS5.

DS5

ds1gthpsin65

R1 DS5 GETTING HLP SNCE TRNED 65

QUESTION TEXT:

Since {you/SP} turned 65, was there any time when {you/he/she} got help with these activities (eating, getting cleaned up, using the toilet, or getting dressed)?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section MC – Medical Care Activities

Derived Variables from Items in DS Section

ds1dhlpqr	R1 D ANY SELF CARE HELP LAST YR
ds1dhlpst	R1 D MTHS SINCE SLF CARE HELP ST
ds1dhlpnd	R1 D MTHS SINCE SLF CARE HLP END
ds1dhlpysr	R1 D YEARS HELP IN CARING 4 SELF

NHATS Round 1

Section MC [MEDICAL CARE ACTIVITIES]

Sequence: 26

MC1PRE

MC1PRE

NOT ON FILE

The next few questions are about medicines that {you take/SP takes} that are prescribed by a doctor.

PRESS 1 AND ENTER TO CONTINUE

MC1

mc1meds

R1 MC1 IN MNTH TKE MEDS PRESCRBD

DISPLAY INSTRUCTIONS:

DISPLAY "in the last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} take any medicines prescribed by a doctor?

CODES

1	YES	GO TO MC1oPRE
2	NO	GO TO MC1oPRE
	REFUSED	GO TO MC1oPRE
	DON'T KNOW	GO TO MC1oPRE

MC2

mc1medstrk

R1 MC2 KEEP TRCK PRESCRIVED MEDS

DISPLAY INSTRUCTIONS:

If PROXY flag is null, display "1a".

If PROXY flag = 1 (yes), display "1b".

DISPLAY "last month" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MC{1a/1b}

Next we'd like to know more about how {you keep/SP keeps} track of {your/{his/her}} prescribed medicines. By keeping track, we mean making sure {you take/{he/she} takes} the correct amount at the right time.

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

CODES

1	ALWAYS DID IT BY SELF	MC3
2	ALWAYS DID IT TOGETHER WITH SOMEONE ELSE	MC3
3	SOMEONE ELSE ALWAYS DID IT	MC5A
4	IT VARIED (MORE THAN ONE WAY)	

5

NOT DONE IN LAST MONTH
REFUSED
DON'T KNOW

MC6

MC2A

mc1medsslf

R1 MC2A LAST MNTH KEEP TRACK SLF

DISPLAY INSTRUCTIONS:

DISPLAY “by {yourself/{himself/herself}}” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, did {you/SP} ever keep track of {your/{his/her}} prescribed medicines by {yourself/{himself/herself}}?

CODES

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

MC3

mc1whrgtmed1

R1 MC3 SP GOT MEDS LOCAL STORE

mc1whrgtmed2

R1 MC3 SP GOT MEDS BY MAIL

mc1whrgtmed3

R1 MC3 SP GOT MEDS HC PRVDR_HSP (from MC3A)

mc1whrgtmed4

R1 MC3 SP GOT MEDS OTHR SPECIFY

DISPLAY INSTRUCTIONS:

DISPLAY “local” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Where did {you/SP} get the medicines that {you/{he/she}} took in the last month? Did {you/{he/she}} get any of these from a local store or pharmacy, by mail, or somewhere else?

SELECT ALL THAT APPLY

CODES

Code All That Apply

- | | | |
|----|--------------------------|----------|
| 1 | LOCAL STORE OR PHARMACY | BOX MC3b |
| 2 | BY MAIL | BOX MC3b |
| 91 | SOMEWHERE ELSE (SPECIFY) | |
| | REFUSED | MC4 |
| | DON'T KNOW | MC4 |
-

MC3A

MC3A

NOT ON FILE

QUESTION TEXT:

SPECIFY PLACE {SP} GOT PRESCRIBED MEDICINES IN THE LAST MONTH

ENTER TEXT

Length

50

BOX MC3b

BOXMC3b

NOT ON FILE

If MC3 = 1 (LOCAL STORE OR PHARMACY), go to MC3B.
Otherwise, go to MC4.

MC3B

mc1howpkupm1

R1 MC3B SP PICKD UP MEDS BY SELF

mc1howpkupm2

R1 MC3B SP HAD MEDS DELIVERED

mc1howpkupm3

R1 MC3B SMEON ELSE PICKD UP MEDS

QUESTION TEXT:

Thinking of these prescribed medicines that {you/SP} took in the last month and got from a local store or pharmacy, did {you/{he/she}} pick them up {yourself/{himself/herself}}, have them delivered, or did someone else pick them up for {you/{him/her}}?

SELECT ALL THAT APPLY

CODES

Code All That Apply

- 1 PICKED THEM UP BY SELF
 - 2 HAD THEM DELIVERED
 - 3 HAD SOMEONE ELSE PICK THEM UP
 - REFUSED
 - DON'T KNOW
-

MC4

mc1medsrem

R1 MC4 USE REMNDERS TO KEEP TRCK

DISPLAY INSTRUCTIONS:

DISPLAY “In the last month” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOW CARD MC2

In the last month, when {you/SP} kept track of {your/{his/her}} medicines, how often did {you/{he/she}} use reminders such as a pill organizer, box, dispenser, or calendar? Would you say every time, most times, sometimes, rarely, or never?

CODES

- 1 EVERY TIME
 - 2 MOST TIMES
 - 3 SOMETIMES
 - 4 RARELY
 - 5 NEVER
 - REFUSED
 - DON'T KNOW
-

BOX MC5A

BOXMC5A

NOT ON FILE

If MC2 = 1 (always did by self), DK or RF, go to MC7.
Otherwise, go to MC5A.

MC5A

op1medshlp

R1 MC5A HELPS SP WITH MEDICINES

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

If MC2 = 2 (always with someone else) display "with".

If MC2 = 3 (someone else always did) display "for".

If MC2 = 4 (varied), display "with or for".

Display "first" and "last" in underlined text in the question text for name.

QUESTION TEXT:

In the last month, who kept track of {your/SP's} medicines {with/for/with or for} {you/{him/her}}?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MC5b. [What is (his/her) first name?] CONFIRM SPELLING

MC5c. [What is (his/her) last name?] CONFIRM SPELLING

MC5d. [What is (his/her) relationship to {you/SP}] PRESS F1 FOR HELP SCREEN

CODES	Code All That Apply
1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW

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

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC5, set HELPEDTRACKMEDS flag = 1 (yes).
Do not display these response codes: 1,2,3,4,7,8, and 37

BOX MC6

BOXMC6

NOT ON FILE

If MC2 = 2 (always with someone else), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to MC8.

If MC2 = 3 (someone else always did), and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC9.

If MC2 = 4 (varied) and HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES, go to BOX MC7.

Otherwise go to MC6.

MC6

mc1dmrdsreas

R1 D MEDS REASN BY WITH OTHERS

DISPLAY INSTRUCTIONS:

If MC2 = 2 (always with someone else), display "with".
If MC2 = 3 (someone else always did), display "for".
If MC2 = 4 (varied) display, "with or for".
If MC2 = 5 (not done in last month), do not display first sentence.

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

QUESTION TEXT:

{What is the reason someone else kept track of {your/SP's} medicines {with/for/with or for}
{you/{him/her}}?} Was that because of {your/{his/her}} health or functioning or some other reason?

CODES

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

PROGRAMMER INSTRUCTIONS:

If MC6 = 1 (HEALTH OR FUNCTIONING), set HEALTHREASONHELPTRACKMEDS flag = 1 (yes).

BOX MC7

BOXMC7

NOT ON FILE

If MC2a = 1 (yes by self), go to MC7.
If MC2 = 2 (always with someone else) or (MC2a = 2 (didn't do by self), DK or RF),
go to MC8.
If [MC2 = 3 (someone else always did) or 5 (not done in last month)] and
HEALTHREASONHELPTRACKMEDS flag = 1 (yes), go to BOX MC9.
Otherwise go to MC10PRE.

MC7

mc1medsdif

R1 MC7 HOW DIFFIC KEEP TRACK MED

DISPLAY INSTRUCTIONS:

DISPLAY “by {yourself/{himself/herself}}” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last month, how much difficulty did {you/SP} have keeping track of {your/{his/her}} medicines by
{yourself/{himself/herself}}? Would you say none, a little, some, or a lot?

CODES

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

MC8

mc1medsyrgo

R1 MC8 COMPAR YR AGO HW KEP TRCK

DISPLAY INSTRUCTIONS:

DISPLAY "a year ago" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

Compared to a year ago, {do you/does SP} keep track of {your/{his/her}} medicines
{yourself/himself/herself} more often, less often, or about the same?

CODES

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

BOX MC9

BOXMC9

NOT ON FILE

If [MC2 = 1 (always by self) or 4 (varied)] and [MC7 = 2 (a little difficulty) or MC7 = 3 (some difficulty) or MC7 = 4 (a lot of difficulty)], go to MC9.

If [MC2 = 2 (always with someone else) or MC2 = 3 (someone else always did) or MC2 = 4 (varied) or MC2 = 5 (not done in last month)] and [HEALTHREASONHELPTRACKMEDS flag = 1 (yes) or HELPEDTRACKMEDS flag = 1 (yes) for SERVICE/SOMEONE FROM PLACE SP LIVES], go to MC9.

Otherwise, go to MC10PRE.

MC9

mc1medsmis

R1 MC9 MAKE MISTAKE TAKING MEDS

DISPLAY INSTRUCTIONS:

If MC2 = 1 (always by self) or 5 (not done in last month) or MC2a = 1 (yes by self), display "it was too difficult to keep track of them by {yourself/{himself/herself}}"

Otherwise display "no one was there to help or keep track of them for {you/{him/her}}".

QUESTION TEXT:

In the last month, did {you/SP} ever make a mistake in taking {your/{his/her}} prescribed medicines because {it was too difficult to keep track of them by {yourself/{himself/herself}} /no one was there to help or keep track of them for {you/{him/her}}?}

IF NEEDED: That is, did {you/SP} take {your/{his/her}} medicines at the wrong time or in the wrong amount or miss taking them altogether?

CODES

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

MC10PRE

MC10PRE

NOT ON FILE

The next questions are about how {you handle/SP handles} {your/{his/her}} medical care.

PRESS 1 AND ENTER TO CONTINUE

MC10**mc1havregdoc**

R1 MC10 YOU HAVE REGULAR DOCTOR

QUESTION TEXT:

Is there a doctor that {you think/SP thinks} of as {your/{his/her}} regular doctor, that is, a doctor {you usually go/{he/she} usually goes} to when {you are sick and need/{he/she} is sick and needs} advice about {your/{his/her}} health?

CODES

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

MC12**mc1regdoclyr**

R1 MC12 SEEN REG DOC WTHN LST YR

DISPLAY INSTRUCTIONS:

If MC10 = 1 (yes, regular doctor), display “{your/{his/her}} regular doctor”

Otherwise, display “a doctor”

DISPLAY “last year” IN BOLD UNDERLINED TEXT

QUESTION TEXT:

{Have you/Has SP} seen {{your/{his/her}} regular doctor/ a doctor} within the last year? That is, since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}.

CODES

- | | | |
|---|------------|---------|
| 1 | YES | |
| 2 | NO | MC20PRE |
| | REFUSED | MC20PRE |
| | DON'T KNOW | MC20PRE |
-

MC15**mc1hwgtregd1**

R1 MC15 SP DROVE SELF TO REG DOC

mc1hwgtregd2

R1 MC15 FAM PD HLP DRVE REG DOC

mc1hwgtregd3

R1 MC15 VAN PLCE SP LIVE REG DOC

mc1hwgtregd4

R1 MC15 VAN FR DIS SENIOR REG DC

mc1hwgtregd5

R1 MC15 PUBLIC TRANSPORT REG DOC

mc1hwgtregd6

R1 MC15 SP TOOK TAXI TO REG DOC

mc1hwgtregd7

R1 MC15 SP WALKED TO REG DOC (from MC15A)

mc1hwgtregd8

R1 MC15 REG DOC WAS HOME VISIT (from MC15A)

mc1hwgtregd9

R1 MC15 OTHR SPECIFY REG DOC

DISPLAY INSTRUCTIONS:

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

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

If FACILITY flag = 1 (yes) or RETIREMENT COMMUNITY flag = 1 (yes), display response 3 and for response 4, "not provided by the place SP lives".

If MC10 = 1 (yes, regular doctor), display "{your/{his/her}} regular doctor".

Otherwise, display "the doctor".

DISPLAY "In the last year" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

SHOWCARD MC3

In the last year, how did {you/SP} get to {{{your/{his/her}}} regular doctor/the doctor}? Did {you/{he/she}} {drive,} get a ride from a family member or friend, {use a service provided by the place where {you live/{he/she} lives},} or what?

SELECT ALL THAT APPLY

CODES	Code All That Apply	
1	{DROVE}	MC16
2	GOT A RIDE FROM A FAMILY MEMBER OR FRIEND OR SOMEONE PAID TO HELP	MC16
3	{USED A VAN OR SHUTTLE SERVICE PROVIDED BY THE PLACE SP LIVES}	MC16
4	USED A VAN OR SHUTTLE SERVICE FOR PEOPLE WITH DISABILITIES OR SENIORS {(NOT PROVIDED BY THE PLACE SP LIVES)}	MC16
5	TOOK PUBLIC TRANSPORTATION (THE BUS, SUBWAY, TRAIN, OR TRAM)	MC16
6	TOOK A TAXI	MC16
91	OTHER (SPECIFY) REFUSED DON'T KNOW	MC16

MC15A**MC15A**

NOT ON FILE

QUESTION TEXT:

SPECIFY HOW GOT TO DOCTOR

ENTER TEXT

Length

50

MC16**mc1ansitindr**

R1 MC16 ANONE SIT IN W YOU AT DR

DISPLAY INSTRUCTIONS:

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

If MC10 = 1 (yes, regular doctor), display "regular".

DISPLAY "last year" IN BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last year, did anyone sit in with {you/SP} and {your/{his/her}} {regular} doctor during {your/{his/her}} visits?

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

CODES

1	YES	
2	NO	MC2oPRE
	REFUSED	MC2oPRE
	DON'T KNOW	MC2oPRE

MC17A**op1dochlp**

R1 MC17A SITS IN W SP AT DRS

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

Display "first" and "last" in underlined text in the question text for name.

QUESTION TEXT:

Who was that (who sat in with {you/SP} and {your/{his/her}} doctor)?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MC17b. [What is (his/her) first name?] CONFIRM SPELLING

MC17c. [What is (his/her) last name?] CONFIRM SPELLING

MC17d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES	Code All That Apply
1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
30	BOARDER/RENTER
31	PAID AIDE/HOUSEKEEPER/EMPLOYEE
32	ROOMMATE
33	EX-WIFE/EX-HUSBAND
34	BOYFRIEND/GIRLFRIEND
35	NEIGHBOR
36	FRIEND
37	SERVICE/SOMEONE FROM THE PLACE SP LIVES
91	OTHER RELATIVE
92	OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC17, set SATINWITHDOCTOR flag = 1(yes).
Do not display these response codes: 1,2,3,4,7,8, and 37

MC17B

MC17B

NOT ON FILE

PRESS 1 AND ENTER TO CONTINUE

BOX MC18

BOXMC18

NOT ON FILE

If only one person selected/added at MC17, set SATINWITHDOCTORFLAG=1 (YES) for person selected and go to MC19.

Otherwise, go to MC18

MC18

op1dochlpst

R1 MC18 SITS MOST IF MORE THAN 1

DISPLAY INSTRUCTIONS:

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Display only those roster items selected at MC17. Do not allow new entries. Allow only one roster item to be selected.

If MC10 = 1 (yes, regular doctor), display "regular".

DISPLAY "most often" AS BOLD UNDERLINED TEXT

QUESTION TEXT:

Who sat in with {you/SP} and {your/{his/her}}{regular} doctor most often?

SELECT ONE

PROGRAMMER INSTRUCTIONS:

For roster entry selected at MC18, set SATINWITHDOCTORFLAG = 1 (yes).

MC19

mc1tpsevr1

R1 MC19 HLP UPTO EXAM TBL DRESS

mc1tpsevr2

R1 MC19 REMND SP OF QSTNS FR DOC

mc1tpsevr3

R1 MC19 ASK TELL DOC THINGS 4 SP

mc1tpsevr4

R1 MC19 HLP SP UNDERSTAND DOC

DISPLAY INSTRUCTIONS:

If at MC19b, do not display question text in brackets.

Otherwise, display question text in brackets.

USE "SAME QUESTION STEM" DISPLAY. DISPLAY "last year" IN BOLD UNDERLINED TEXT

If SATINWITHDOCTOR FLAG = 1 (YES) for SERVICE/SOMEONE FROM PLACE SP LIVES , display "the person from the place where {you live/SP lives}".

Otherwise, display "FIRST NAME LAST NAME" OF PERSON with SATINWITHDOCTORFLAG = 1 (YES)

QUESTION TEXT:

[{}During those visits in the last year, did {FIRST NAME LAST NAME OF PERSON WITH SATINWITHDOCTORFLAG = 1 (YES)/the person from the place where {you live/SP lives}} ever {}]

[variable text {b-e}]

RESPONSE 2 [b] help {you/SP} with getting on the exam table, dressing, and undressing?

RESPONSE 3 [c] remind {you / SP} about things {you/{he/she}} wanted to ask or tell the doctor?

RESPONSE 4 [d] ask or tell the doctor things for {you/SP}?

RESPONSE 5 [e] help {you/SP} understand what the doctor was saying?

CODES

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

PROGRAMMER INSTRUCTIONS:

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

MC2oPRE

MC2oPRE

NOT ON FILE

Now I have a few questions about handling medical bills and insurance.

PRESS 1 AND ENTER TO CONTINUE

MC2o

mc1chginspln

R1 MC2o CHGD ADD INS OR DRUG PLN

DISPLAY INSTRUCTIONS:

DISPLAY “last year” AS BOLD UNDERLINED TEXT

QUESTION TEXT:

In the last year, that is since {MONTH AND YEAR 12 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} changed {your/his/her} Medicare supplemental plan, {your/his/her} prescription drug plan, or decided to leave a managed care plan?

CODES

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

MC21

mc1anhlpwdec

R1 MC21 ANYONE HELP W DECISION

QUESTION TEXT:

Did anyone help {you/SP} with that decision or make that decision for {you/him/her}?

CODES

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

MC22A

op1insurhlp

R1 MC22A HELPS WITH INSUR DECIS

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display HELPER RELATIONSHIP CODES.

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

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

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

Display "first" and "last" in underlined text in the question text for name.

QUESTION TEXT:

Who helped or did this for {you/SP}?

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

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

MC22b. [What is (his/her) first name?] CONFIRM SPELLING

MC22c. [What is (his/her) last name?] CONFIRM SPELLING

MC22d. [What is (his/her) relationship to {you/SP}?] PRESS F1 FOR HELP SCREEN

CODES	Code All That Apply
1	SAMPLE PERSON
2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT

24 UNCLE
25 COUSIN
26 STEPDAUGHTER'S SON/DAUGHTER
27 STEPSON'S SON/DAUGHTER
28 DAUGHTER-IN-LAW'S SON/DAUGHTER
29 SON-IN-LAW'S SON/DAUGHTER
30 BOARDER/RENTER
31 PAID AIDE/HOUSEKEEPER/EMPLOYEE
32 ROOMMATE
33 EX-WIFE/EX-HUSBAND
34 BOYFRIEND/GIRLFRIEND
35 NEIGHBOR
36 FRIEND
37 SERVICE/SOMEONE FROM THE PLACE SP LIVES
91 OTHER RELATIVE
92 OTHER NONRELATIVE

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at MC22, set HELPEDMAKEINSURANCEDECISIONS flag=1 (yes).

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

Go to Section PA-Participation.

Derived Variables from Items in the MC Section

mc1dmedssfdf	R1 D DIFF LEVEL MEDICATIONS SELF
mc1dmedsreas	R1 D MEDS REASN BY WITH OTHERS [SEE MC6]

NHATS Round 1

Section PA [PARTICIPATION]

Sequence: 27

PA1PRE

PA1PRE

NOT ON FILE

Now let's talk about other activities {you have/SP has} been doing in the last month.

PRESS 1 AND ENTER TO CONTINUE

PA1

pa1vistfrfam

R1 PA1 EVER VISIT FRIENDS FAMILY

DISPLAY INSTRUCTIONS:

Display PA1, PA2, PA3, and PA4 on the same screen.

Display "not" in underlined text.

QUESTION TEXT:

In the last month, did {you/SP} ever visit in person with friends or family not living with {you/him/her}, either at {your/his/her} home or theirs?

CODES

1	YES	
2	NO	
	REFUSED	PA5
	DON'T KNOW	PA5

PA2

pa1hlkepfvst

R1 PA2 HLTH KP FR VIST FAM FRNDS

DISPLAY INSTRUCTIONS:

Display "not" in underlined text.

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (visiting with friends and family not living with {you/him/her})?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

BOX PA3

BOXPA3

NOT ON FILE

If DRIVES flag is null, go to PA3.
Otherwise, go to PA4.

PA3

pa1trkpfrvis

R1 PA3 TRAN PRB KP FR VST FRNDS

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (visiting in person with friends and family not living with {you/him/her})?

CODES

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

PA4

pa1impvstfam

R1 PA4 IMPRTNT VISIT FRNDS FAMLY

DISPLAY INSTRUCTIONS:

Display “not” in underlined text.

QUESTION TEXT:

How important is it to {you/SP} to visit in person with friends or family not living with {you/him/her}? Would you say very important, somewhat important, or not so important?

CODES

- | | |
|---|--------------------|
| 1 | VERY IMPORTANT |
| 2 | SOMEWHAT IMPORTANT |
| 3 | NOT SO IMPORTANT |
| | REFUSED |
| | DON’T KNOW |
-

PA5

pa1attrelser

R1 PA5 EVER ATTEND RELIG SERVCS

DISPLAY INSTRUCTIONS:

Display PA5, PA6, PA7, and PA8 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever attend religious services?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | PA9 |
| | DON’T KNOW | PA9 |
-

PA6

pa1htkfrrlsr

R1 PA6 HEALTH KEEP FRM RELI SERV

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (attending religious services)?

CODES

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

BOX PA7

BOXPA7

NOT ON FILE

If DRIVES flag is null, go to PA7.
Otherwise, go to PA8.

PA7

pa1trprrelsru

R1 PA7 TRAN PRO KEEP FM RELG SER

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (attending religious services)?

CODES

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

PA8

pa1impreser

R1 PA8 HW IMPORT ARE RELIG SERVS

QUESTION TEXT:

How important is it to {you/SP} to attend religious services? Would you say very important, somewhat important, or not so important?

CODES

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

PA9

pa1clbmtgrac

R1 PA9 CLUB MEETINGS GRP ACTIVES

DISPLAY INSTRUCTIONS:

Display PA9, PA10, PA11, and PA12 on the same screen.
If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display "besides religious services,".

QUESTION TEXT:

In the last month, {besides religious services,} did {you/SP} ever participate in clubs, classes, or other organized activities?

CODES

1	YES	
2	NO	
	REFUSED	PA13
	DON'T KNOW	PA13

PA10

pa1hlkpfrclb

R1 PA10 HELTH KEP FRM CLB MTINGS

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this (participating in clubs, classes, or other organized activities)?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

BOX PA11

BOXPA11

NOT ON FILE

If DRIVES flag is null, go to PA11.
Otherwise, go to PA12.

PA11

pa1trprkpfgr

R1 PA11 TRANS PROB KEEP FM GROPS

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (participating in clubs, classes, or other organized activities)?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

PA12**pa1imparclub**

R1 PA12 IMPORT PARTIC CLUBS GRUP

DISPLAY INSTRUCTIONS:

If PA5 = 1 (ATTENDS RELIGIOUS SERVICES), display “other than religious services”

QUESTION TEXT:

How important is it to {you/SP} to participate in clubs, classes, or other organized activities {other than religious services}? Would you say very important, somewhat important, or not so important?

CODES

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

PA13**pa1outfrenjy**

R1 PA13 EVER GO OUT FOR ENJOYMNT

DISPLAY INSTRUCTIONS:

Display PA13, PA14, PA15, and PA16 on the same screen.

If PA9 = 1 (PARTICIPATES IN GROUP ACTIVITIES), display “besides participating in club or group activities.”

QUESTION TEXT:

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

CODES

- | | |
|---|------------|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'T KNOW |
- PA17
PA17

PA14**pa1hlkpgoenj**

R1 PA14 HLTH KP GO OUT FOR ENJOY

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from doing this?

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

CODES

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

BOX PA15

BOXPA15

NOT ON FILE

If DRIVES flag is null, go to PA15.
Otherwise, go to PA16.

PA15

pa1trprgoout

R1 PA15 TRANSPROB KEEP FM GO OUT

QUESTION TEXT:

In the last month, did a transportation problem ever keep {you/SP} from doing this (going out for enjoyment)?

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

CODES

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

PA16

pa1impouteny

R1 PA16 IMPORT GO OUT FOR ENJOYT

QUESTION TEXT:

How important is it to {you/SP} that {you go/he/she goes} out for enjoyment? Would you say very important, somewhat important, or not so important?

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

CODES

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

PA17

pa1workfrpay

R1 PA17 EVER WORK FOR PAY

DISPLAY INSTRUCTIONS:

Display PA17 and PA18 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever work for pay or in a business {you own/he/she owns}?

CODES

1	YES	
2	NO	
	REFUSED	PA19
	DON'T KNOW	PA19

PA18**pa1hlkpfrwrk**

R1 PA18 HEALTH KEEP YOU FRM WORK

DISPLAY INSTRUCTIONS:

If PA17 = 1 (YES), display “did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (working for pay)”.

If PA17 = 2 (NO), display “was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (work for pay)”.

QUESTION TEXT:

In the last month, {did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (working for pay)/was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (work for pay)}?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

PA19**pa1voltrwork**

R1 PA19 EVER DO VOLUNTEER WORK

DISPLAY INSTRUCTIONS:

Display PA19 and PA20 on the same screen.

QUESTION TEXT:

In the last month, did {you/SP} ever do volunteer work?

CODES

1	YES	
2	NO	
	REFUSED	PA21
	DON'T KNOW	PA21

PA20**pa1hlkpfrvol**

R1 PA20 HELTH KEEP FM VOLUNTRING

DISPLAY INSTRUCTIONS:

If PA19 = 1 (YES), display “did {your/SP’s} health or functioning ever keep {you/him/her} from doing this (volunteer work)”.

If PA19 = 2 (NO), display “was {your/SP’s} health or functioning a reason that {you/he/she} did not do this (volunteer work)”.

QUESTION TEXT:

In the last month, {did {your/SP's} health or functioning ever keep {you/him/her} from doing this (volunteer work)/was {your/SP's} health or functioning a reason that {you/he/she} did not do this (volunteer work)}?

CODES

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

PA21**pa1prcranoth**

R1 PA21 PROVIDE CARE ANOTHER PERS

DISPLAY INSTRUCTIONS:

- If PA17 = 1 (WORKED FOR PAY) or PA19 = 1 (VOLUNTEER WORK), display "besides as {a job/volunteer work/a job or volunteer work}.".
If PA17 = 1 (WORKED FOR PAY) and PA19 = 2 (NO VOLUNTEER WORK), display "a job".
If PA19 = 1 (VOLUNTEER WORK) and PA17 = 2 (NO WORK FOR PAY), display "volunteer work".
If PA17 = 1 (WORKED FOR PAY) and PA19 = 1 (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/SP} ever provide care for or look after an adult or child who cannot care for themselves?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | PA23 |
| | REFUSED | PA23 |
| | DON'T KNOW | PA23 |
-

PA22**op1spcaredfr**

R1 PA22D SP CARED FOR PERSON

op1relatnshp

R1 OTHR PRSN RELATIONSHIP TO SP

DISPLAY INSTRUCTIONS:

Display RELATIONSHIP CODES.

Display person roster with FIRST NAME, LAST NAME, and RELATIONSHIP TO SP. Allow entry for FIRST NAME and RELATIONSHIP TO SP fields.

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

QUESTION TEXT:

Who was that {{you/he/she} provided care for or looked after}?

PROBE: Anyone else?

SELECT ALL THAT APPLY

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

PA22b. [What is (his/her) first name?] CONFIRM SPELLING

PA22c. [What is (his/her) last name?] CONFIRM SPELLING

PA22d. [What is (his/her) relationship to {you/SP?}] PRESS F1 FOR HELP SCREEN

CODES

2	SPOUSE/PARTNER
3	DAUGHTER
4	SON
5	DAUGHTER-IN-LAW
6	SON-IN-LAW
7	STEPDAUGHTER
8	STEPSON
9	SISTER
10	BROTHER
11	SISTER-IN-LAW
12	BROTHER-IN-LAW
13	MOTHER
14	STEPSMOTHER
15	MOTHER-IN-LAW
16	FATHER
17	STEPFATHER
18	FATHER-IN-LAW
19	GRANDDAUGHTER
20	GRANDSON
21	NIECE
22	NEPHEW
23	AUNT
24	UNCLE
25	COUSIN
26	STEPDAUGHTER'S SON/DAUGHTER
27	STEPSON'S SON/DAUGHTER
28	DAUGHTER-IN-LAW'S SON/DAUGHTER
29	SON-IN-LAW'S SON/DAUGHTER
91	OTHER RELATIVE
92	NOT RELATED

PROGRAMMER INSTRUCTIONS:

For each roster selection/addition at PA22, set PERSONSPCARESFOR flag = 1 (YES).

PA23**pa1evrgowalk****R1 PA23 EVER GO WALKING****QUESTION TEXT:**

In the last month, did {you/SP} ever go walking for exercise?

CODES

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

PA24**pa1vigoractv**

R1 PA24 EVER VIGOROUS ACTIVITIES

QUESTION TEXT:

In the last month, did {you/SP} ever spend time on vigorous activities that increased {your/his/her} heart rate and made {you/him/her} breathe harder? This includes things like working out, swimming, running or biking, or playing a sport.

CODES

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

PA25**PA25**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display PA25 and PA26 on the same screen.

QUESTION TEXT:

Thinking about all the activities {you do/SP does} these days, what is {your/his/her} favorite activity? It can be an activity we already asked about, or something else, as long as {you/SP} currently {do/does} it.

IF SP HAS NO FAVORITE ACTIVITY, ENTER "NONE".

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

If PA25 = NONE (in any combination of upper and lower case), go to Section SD.

PA26**pa1helmfact**

R1 PA26 HEALTH LIMIT FAV ACTIVTY

QUESTION TEXT:

In the last month, did {your/SP's} health or functioning ever keep {you/him/her} from this activity?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section SD - Smoking

Derived Variables from Items in PA Section	
pa1dfavact	R1 D FAVORITE ACTIVITY

NHATS Round 1

Section SD [SMOKING]

Sequence: 28

SD1PRE

SD1PRE

NOT ON FILE

The next questions are about smoking cigarettes.

PRESS 1 AND ENTER TO CONTINUE

SD1

sd1smokedreg

R1 SD1 SMOKED REGULARLY

QUESTION TEXT:

Did {you/SP} ever smoke cigarettes regularly, at least 1 cigarette a day?

CODES

1	YES	
2	NO	SECTION PE
	REFUSED	SECTION PE
	DON'T KNOW	SECTION PE

SD2

sd1smokesnow

R1 SD2 SMOKES NOW

QUESTION TEXT:

{Do you/Does SP} smoke cigarettes now?

CODES

1	YES	
2	NO	SECTION PE
	REFUSED	SECTION PE
	DON'T KNOW	SECTION PE

SD3

sd1numcigday

R1 SD3 NUM OF CIGARETTES PER DAY

DISPLAY INSTRUCTIONS:

IF SD2=1 (SMOKES NOW), DISPLAY "{do you/does SP}"
ELSE IF SD2=2 (DOES NOT SMOKE NOW), DISPLAY "{did you/did SP}"

IF NUMBER ENTERED VIOLATES THE HARD RANGE (SD3<1 OR SD3 >120) THEN DISPLAY ERROR MESSAGE #13
FROM THE GLOBAL SPECS.

QUESTION TEXT:

On average, how many cigarettes per day {{do you/does SP}/{did you/did SP}} usually smoke?

ENTER # OF CIGARETTES

ENTER NUMBER

Range	1 to 120
Soft Range	1 to 40
REFUSED	
DON'T KNOW	

SD4**sd1agesrtsmk**

R1 SD4 AGE STARTED SMOKING

QUESTION TEXT:

How old {were you/was SP} when {you/he/she} first smoked cigarettes regularly?

ENTER AGE STARTED SMOKING

ENTER NUMBER

Range	6 to 70
Soft Range	12 to 35
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE STARTED SMOKING CANNOT BE GREATER THAN CURRENT AGE".

BOX SD5**BOXSD5**

NOT ON FILE

IF SD2=1 (SMOKES NOW), GO TO SECTION PE - PERFORMANCE
ELSE GO TO SD5

SD5**sd1agelstsmk**

R1 SD5 AGE LAST SMOKED REGULARLY

QUESTION TEXT:

How old {were you/was SP} when {you/he/she} last smoked cigarettes regularly?

ENTER AGE QUIT SMOKING

ENTER NUMBER

Range	6 to 102
Soft Range	25 to 80
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE LAST SMOKED CANNOT BE GREATER THAN CURRENT AGE".

If age entered < age entered at SD4, display error message "INVALID RESPONSE. AGE LAST SMOKED CANNOT BE LESS THAN AGE STARTED SMOKING".

GO TO SECTION PE – Performance.

NHATS Round 1

Section PE [PERFORMANCE]

Sequence: 30

PE1PRE

PE1PRE

NOT ON FILE

QUESTION TEXT

Next I would like to ask {you/SP} to try to perform a few simple movements, that is to move {your/{his/her}} body in different ways. Before we start, I need to ask a few questions.

PRESS 1 AND ENTER TO CONTINUE

PE1

pe1whhndsign

R1 PE1 HAND USE TO SIGN YOR NAME

QUESTION TEXT:

Which hand {do you/does SP} use to sign {your/{his/her}} name?

CODES

- | | |
|---|------------|
| 1 | LEFT |
| 2 | RIGHT |
| 3 | BOTH |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

If PE1 = 1, set LEFTHANDED flag = 1 (yes).
If PE1 = 2, set Righthanded flag = 1 (yes).
If PE1 = 3, set EITHERHANDED flag = 1 (yes).

PE2

pe1surghdwrt

R1 PE2 HAVE SURGRY TO HAND WRIST

DISPLAY INSTRUCTIONS:

Display “in the last 3 months” in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hand or wrist?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | PE4 |
| | REFUSED | PE4 |
| | DON'T KNOW | PE4 |
-

PE3

pe1surgyside

R1 PE3 WHICH SIDE WAS SURGERY

QUESTION TEXT:

Which side was that (surgery or serious injury on {your/SP's} hand or wrist)? Was it the left side or right

side?

CODES

1	LEFT SIDE	
2	RIGHT SIDE	
3	BOTH SIDES	PE8
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If PE3 = 1 (left hand/wrist surgery), set LEFTGRIPTEST flag = 2 (no).

If PE3 = 2 (right hand/wrist surgery), set RIGHTGRIPTEST flag = 2 (no).

If PE3 = 3 (both hands/wrists surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE4

pe1flrappain

R1 PE4 EXPER FLARE UP PAIN HAND

DISPLAY INSTRUCTIONS:

Display "currently" in bold underlined text.

QUESTION TEXT:

{Are you/Is SP} currently experiencing a flare-up of pain in either hand or wrist?

CODES

1	YES	
2	NO	PE6
	REFUSED	PE6
	DON'T KNOW	PE6

PE5

pe1sideflrup

R1 PE5 SIDE CURRNT FLARE UP PAIN

DISPLAY INSTRUCTIONS:

Display "current" in bold underlined text.

QUESTION TEXT:

Which side is that current flare-up of pain in {your/SP's} hand or wrist? Is it the left side or right side?

CODES

1	LEFT SIDE	
2	RIGHT SIDE	
3	BOTH SIDES	PE8
	REFUSED	
	DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

If PE5 = 1 (left hand/pain flare up), set LEFTGRIPTEST flag = 2 (no).

If PE5 = 2 (right hand/pain flare up), set RIGHTGRIPTEST flag = 2 (no).

If PE5 = 3 (both hands/pain flare up), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE6

pe1surgarmsh

R1 PE6 SURGERY ARM OR SHOULDER

DISPLAY INSTRUCTIONS:

Display "In the last 3 months" in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} arm or shoulder?

CODES

1	YES	
2	NO	PE8
	REFUSED	PE8
	DON'T	PE8

PE7**pe1sidsurgar**

R1 PE7 SIDE SURGERY ARM OR SHLDR

QUESTION TEXT:

Which side was that (surgery or serious injury on {your/SP's} arm or shoulder)? Was it the left side or right side?

CODES

1	LEFT SIDE
2	RIGHT SIDE
3	BOTH SIDES
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

If PE7 = 1 (left arm/shoulder surgery), set LEFTGRIPTEST flag = 2 (no).

If PE7 = 2 (right arm/shoulder surgery), set RIGHTGRIPTEST flag = 2 (no).

If PE7 = 3 (both arms/shoulders surgery), set LEFTGRIPTEST flag = 2 (no) and RIGHTGRIPTEST flag = 2 (no).

PE8**pe1surgeryhips**

R1 PE8 SURG HIPS INCLUD REPLCMNT

DISPLAY INSTRUCTIONS:

Display "In the last 3 months" in bold underlined text.

QUESTION TEXT:

In the last 3 months, that is since {MONTH AND YEAR 3 MONTHS PRIOR TO TODAY'S DATE}, {have you/has SP} had surgery or a serious injury on {your/{his/her}} hips (including hip replacement surgery)?

CODES

1	YES	
2	NO	BOX PE11
	REFUSED	BOX PE11
	DON'T KNOW	BOX PE11

PE9**pe1sidhipsrg**

R1 PE9 SIDE WAS HIP SURGERY ON

QUESTION TEXT:

Was that (surgery or serious injury on {your/SP's} hips) only on one side or on both sides?

CODES

- | | |
|---|------------|
| 1 | ONE SIDE |
| 2 | BOTH SIDES |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

If PE9 = 2 (both hips surgery), set CHAIRSTANDS flag = 2 (no).

BOX PE11**BOXPE11**

NOT ON FILE

If MO24 = 1 (always uses mobility device to get out of bed) or MO26 = 4 (never got out of bed by self), go to PE11.

Otherwise go to BOX PE13.

PE11**pe1stndwhold**

R1 PE11 STAND WITHOUT HOLDING ON

DISPLAY INSTRUCTIONS:

Display "stand without holding onto anyone or anything" in bold underlined text.

QUESTION TEXT:

For a few of the body movements, I will ask {you/SP} to stand without holding onto anyone or anything. I can help {you/{him/her}} get up if {you/{he/she}} would like me to. {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE11 = 2 (not able to stand without holding on to anyone/anything), set BALANCESTANDS flag = 2 (no) and HEIGHT flag = 2 (no) and WEIGHT flag = 2 (no).

BOX PE12**BOXPE12**

NOT ON FILE

If CHAIRSTANDS flag = 2 (NO), go to PE13.
Otherwise, go to PE12.

PE12**pe1upchbyslf**

R1 PE12 GET UP OUT CHAIR BY SELF

DISPLAY INSTRUCTIONS:

Display "without" and "by {yourself/{himself/herself}}" in bold underlined text.

If CANE flag = 1 (yes) or WALKER flag = 1 (yes), display "and without {your/{his/her}} {cane/walker/cane or walker}".

If CANE flag = 1 (yes) and WALKER flag is null, display "cane".

If WALKER flag = 1 (yes) and CANE flag is null, display "walker".

If CANE flag = 1 (yes) and WALKER flag = 1 (yes), display "cane or walker".

QUESTION TEXT:

I will also ask {you/SP} to get up out of a chair by {yourself/{himself/herself}} {and without {your/{his/her}} {cane/walker/cane or walker}}. {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE12 = 2 (unable to try getting up from chair without mobility devices/help), set CHAIRSTANDS flag = 2 (no).

BOX PE13

BOXPE13

NOT ON FILE

If MO15 = 1 (used wheelchair every time to get around home/building) or MO16 = 1 (used scooter every time to get around home/building) set WALKING COURSE flag = no (2) and go to PE14.

Otherwise go to PE13.

PE13

pe1wlkdsself

R1 PE13 WALK SHORT DIST BY SELF

DISPLAY INSTRUCTIONS:

Display "walk a short distance in this room by {yourself/{himself/herself}}" in bold underlined text.

If MO13 = 1,2,3, or 4 (used cane every time, most times, sometimes, or rarely when walking around inside) or MO14 = 1,2,3, or 4 (used walker every time, most times, sometimes, or rarely when walking around inside), display "{You/{He/She}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance."

If MO13 = 1,2,3, or 4 and MO14 ≠ 1,2,3, or 4, display "cane".

If MO14 = 1,2,3, or 4 and MO13 ≠ 1,2,3, or 4, display "walker".

If MO13 = 1,2,3, or 4 and If MO14 = 1,2,3, or 4, display "cane or walker".

QUESTION TEXT:

I will (also) be asking {you/SP} to walk a short distance in this room by {yourself/{himself/herself}}. {{You/{He/She}}} may use {your/{his/her}} {cane/walker/cane or walker} if {you feel/{he/she} feels} {you need/{he/she} needs} it to walk a short distance. {Are you/Is SP} able to try this?

CODES

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

PROGRAMMER INSTRUCTIONS:

If PE13 = 2 (unable to walk short distance), set WALKINGCOURSE flag = 2 (no).

PE14**PE14**

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "ACTIVITIES TO SET UP AND DEMONSTRATE" in bolded text.

Display grid with 7 rows and 3 columns.

In R1C1, use null display.

In R1C2, display "ACTIVITY" in bolded text.

In R1C3, display "ADMINISTER" in bolded text.

In R2C1, display "1".

In R2C2, display "BALANCE STANDS".

In R2C3, if BALANCESTANDS flag = 2 (no), display "NO".

Otherwise, display "YES".

In R3C1, display "2".

In R3C2, display "WALKING COURSE".

In R3C3, if WALKINGCOURSE flag = 2 (no), display "NO".

Otherwise, display "YES".

In R4C1, use null display.

In R4C2, use null display.

In R4C3:

If WALKINGCOURSE flag ≠ 2 (yes) and [MO13 = 2, 3, or 4 (used cane most times, sometimes, or rarely inside) or MO14 = 2, 3, or 4 (used walker most times, sometimes, or rarely inside)], display "B. SOMETIMES USES CANE/WALKER AROUND HOME".

Else, if WALKINGCOURSE flag ≠ 2 (yes) and [MO13 = 1 (used cane every time inside) or MO14 = 1 (used walker every time inside)], display "C. ALWAYS USES CANE/WALKER AROUND HOME".

Otherwise, if WALKINGCOURSE flag <> 2 (yes) display "A. DOESN'T USE CANE/WALKER AROUND HOME".

In R5C1, display "3".

In R5C2, display "CHAIR STANDS".

In R5C3, if CHAIRSTANDS flag = 2 (no), display "NO".

Otherwise, display "YES".

In R6C1, display "4".

In R6C2, display "GRIP STRENGTH".

In R6C3:

If LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag=2 (no), display "NO".

Else if LEFTGRIPTEST flag=2 (no) and RIGHTGRIPTEST flag NE 2 (no), display "YES RIGHT".

Else if LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag=2 (no), display "YES LEFT".

Else if [LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag NE 2 (no)] and [RIGHHANDED flag=1 (yes) or EITHERHANDED flag=1 (yes)], display "YES RIGHT".

Else if [LEFTGRIPTEST flag NE 2 (no) and RIGHTGRIPTEST flag NE 2 (no)] and [LEFHANDED flag = 1 (yes)], display "YES LEFT".

Otherwise, display "YES".

Display "TRANSFER INFORMATION TO FRONT PAGE OF ACTIVITIES BOOKLET"

Display "AFTER ACTIVITIES ARE COMPLETED, PRESS 1 AND ENTER TO CONTINUE"

QUESTION TEXT:

ACTIVITIES TO SET UP AND DEMONSTRATE

ACTIVITY	ADMINISTER
1. BALANCE STANDS	{YES/NO}
2. WALKING COURSE	{YES/NO}
	{A. DOESN'T USE CANE/WALKER AROUND HOME/ B. SOMETIMES USES CANE/WALKER AROUND HOME/ C. ALWAYS USES CANE/WALKER AROUND HOME}
3. CHAIR STANDS	[YES/NO]
4. GRIP STRENGTH	{YES RIGHT/YES LEFT/NO}

TRANSFER INFORMATION TO FRONT PAGE OF ACTIVITIES BOOKLET

AFTER ACTIVITIES ARE COMPLETED, PRESS 1 AND ENTER TO CONTINUE

PE15

PE15

NOT ON FILE

QUESTION TEXT:

REMEMBER TO AFFIX SP ID LABEL AND WRITE YOUR INTERVIEWER ID AND DATE ON ACTIVITIES
BOOKLET COVER

PRESS 1 AND ENTER TO CONTINUE

PROGRAMMER INSTRUCTIONS:

Go to Section HW – Height & Weight.

Flag variables set in PE Section

f1lefthand	R1 F PE CAN SP DO LEFT HAND TEST
f1righthand	R1 F PE CAN SP DO RGT HAND TEST
f1eitherhand	R1 F PE CAN SP DO EITHR HAND TST
f1lftgrptst	R1 F PE CAN SP DO LFT GRIP TEST
f1rhtgrptst	R1 F PE CAN SP DO RIGHT GRIP TST
f1charstnds	R1 F PE CAN SP DO CHAIR STANDS
f1balstands	R1 F PE CAN SP DO BALANCE STANDS
f1wlkingrse	R1 F PE CAN SP DO WALKING COURSE

Affix SP ID Label

ab1datemonth R1 AB COVER DATE MONTH
ab1dateyear R1 AB COVER DATE YEAR

Date:

		/			/	2	0	1	
m	m		d	d		y	y	y	y

Interviewer ID:

N	H	A	T				
---	---	---	---	--	--	--	--

National Health and Aging Trends Study

Activities Booklet



42625



ACTIVITIES TO SET UP AND DEMONSTRATE

Transfer information from laptop screen. Mark administration for each activity "YES" or "NO" and copy to the administration box on the page listed for each activity.

ACTIVITY	ADMINISTER	PAGE
1. BALANCE STANDS	<input type="checkbox"/> YES <input type="checkbox"/> NO	4
2. WALKING COURSE	<input type="checkbox"/> YES <input type="checkbox"/> NO	16
	↓	
	<input type="checkbox"/> WA3a. Doesn't use cane/walker around home <input type="checkbox"/> WA3b. Sometimes uses cane/walker around home <input type="checkbox"/> WA3c. Always uses cane/walker around home	17
3. CHAIR STANDS	<input type="checkbox"/> YES <input type="checkbox"/> NO	22
4. GRIP STRENGTH	<input type="checkbox"/> YES RIGHT <input type="checkbox"/> NO <input type="checkbox"/> YES LEFT	28
5. PEAK AIR FLOW	YES	34

GENERAL INSTRUCTIONS

- Administer activities in the order presented in booklet
- Read/say **bold blue text** to SP EXACTLY as written
- Check that SP is wearing appropriate shoes (tennis shoes or shoes with less than 1-inch heels, but not slippers). If not, request SP to change shoes or put shoes on
- Check lighting to see if adequate for SP to see. If not, ask if there is a light you can turn on
- Identify place for SP to sit while watching you demonstrate activities



GENERAL INSTRUCTIONS

Record start time:

<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>
HRS			MINS	

AM
PM

Now I would like to ask you to try to perform a few simple movements, that is to move your body in different ways.

For each movement, I will first describe it and show it to you. Then I'd like you to try to do it.

If you feel it would be unsafe to try it, tell me, and we'll move on to the next one.

Do you have any questions before we begin?

in1strtahrs R1 IN8 START TIME HOURS
in1strtabmin R1 IN8 START TIME MINUTES
in1strtamppm R1 IN8 START TIME AM OR PM

THIS PAGE INTENTIONALLY LEFT BLANK



BALANCE STANDS

Balance Stands Administration:

BA1

YES



NO

GO TO WALKING COURSE p.16

- Clear space for balance stands activity
- Get out stopwatch



SIDE BY SIDE STAND

- Reset stopwatch to 0:00'00"00

Now I'll show you the first movement.

- Demonstrate with inside edges of your feet touching at the heels and toes



I want you to try to stand with your feet together, side-by-side, for about 10 seconds. You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Try to hold this position until I tell you to stop.

Do you think it would be safe to try this?

BA2

YES 

NO

GO TO BA3 3. Not attempted 

Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

YES



NO

GO TO BA3 3. Not attempted 

Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.



SIDE BY SIDE STAND — RESULTS

ba1sxsresult R1 BA3 SIDE BY SIDE STAND RESULT

BA3

<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
		BA4
<p>SEMI-TANDEM</p> <p>Next Page</p> <p></p>		
<p>Time held:</p>  <p>SECS 1/100</p> <p>GO TO WALKING COURSE p.16 </p>		
<p>Reasons not attempted:</p> <p><u>Mark all that apply</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify:  <p>GO TO WALKING COURSE p.16 </p>		

ba1blstdsecs R1 BA4A SECS SIDE BY SIDE STAND

ba1blstdhndr R1 BA4B HNRDS SIDE BY SIDE STND

ba1rsn1ssstd R1 BA5 1 NO STAND SP FELT UNSAFE

ba1rsn2ssstd R1 BA5 2 NO STAND PRXY FELT UNSF

ba1rsn3ssstd R1 BA5 3 NO STND INTWR FELT UNSF

ba1rsn4ssstd R1 BA5 4NO STND SP UNABL2UNDRSTD

ba1rsn9ssstd R1 BA5 9 NO STAND OTHER SPECIFY



SEMI-TANDEM STAND

- Reset stopwatch to 0:00'00"00

Now I'll show you the second movement.

- Demonstrate with inside edge of one foot touching the big toe of the other



I want you to try to stand with the side of the heel of one foot touching the big toe of the other foot for about 10 seconds. You may put either foot in front, whichever is more comfortable for you.

You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Again, try to hold this position until I tell you to stop.

Do you think it would be safe to try this?

BA6

 YES

 NO

GO TO BA7 3. Not attempted


Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

 YES

 NO

GO TO BA7 3. Not attempted


Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.



SEMI-TANDEM STAND — RESULTS

ba1stdmreslt R1 BA7 SEMI TANDEM STAND RESULT

BA7

<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<div style="text-align: center;"> FULL TANDEM Next Page </div>		<div style="text-align: center;"> Time held: SECS 1/100 </div> <div style="text-align: center; margin-top: 10px;"> GO TO WALKING COURSE p.16 </div>
		<div style="text-align: center;"> BA8 </div> <div style="text-align: center;"> Reasons not attempted: <u>Mark all that apply</u> </div> <div style="list-style-type: none; padding-left: 0;"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 40px; width: 100%; margin-top: 5px;"></div> </div> <div style="text-align: center; margin-top: 10px;"> GO TO WALKING COURSE p.16 </div>

ba1stdmsecs R1 BA8A SECS HELD SEMI TANDM STD

ba1stdmhndr R1 BA8B HNRDS HLD SEMI TANDM STD

ba1rsn1ststd R1 BA9 1 NO STNDM SP FELT UNSAFE

ba1rsn2ststd R1 BA9 2NO STNDM PRXY FELT UNSAF

ba1rsn3ststd R1 BA9 3 NO STNDM INTR FELT UNSF

ba1rsn4ststd R1 BA9 4NO STNDM SP UNABL2UNDSTD

ba1rsn9ststd R1 BA9 9 NO STNDM OTHER SPECIFY



FULL TANDEM STAND

- Reset stopwatch to 0:00'00"00

Now I'll show you the third movement.

- Demonstrate with heel of one foot in front of and touching toes of the other



I want you to try to stand with the heel of one foot in front of and touching the toes of the other foot for about 10 seconds. You may put either foot in front, whichever is more comfortable for you.

You may use your arms, bend your knees, or move your body in order to keep your balance, but try not to move your feet. Try to hold this position until I tell you to stop.

Do you think it would be safe to try this?

BA10

 YES

 NO

GO TO BA11 3. Not attempted

Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position

Are you ready?

 YES

 NO

GO TO BA11 3. Not attempted

Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 10 seconds if SP is still holding position, say:

Stop.

42625



FULL TANDEM STAND — RESULTS

ba1ftdmreslt R1 BA11 FULL TANDEM STAND RESULT

BA11

<input type="checkbox"/> 1. COMPLETED, HELD FOR 10 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 10 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
		BA12
ONE LEG EYES OPEN Next Page		Time held:  SECS 1/100
GO TO WALKING COURSE p.16		
Reasons not attempted: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: 		
GO TO WALKING COURSE p.16		

ba1ftdmsecs R1 BA12A SECS HLD FULL TANDM STD

ba1ftdmhndr R1 BA12B HNRDS HLD FLL TANDM STD

ba1rsn1ftstd R1 BA13 1 NO FTNDM SP FLT UNSAFE

ba1rsn2ftstd R1 BA13 2 NO FTNDM PRXY FLT UNSAF

ba1rsn3ftstd R1 BA13 3 NO FTNDM INTR FLT UNSF

ba1rsn4ftstd R1 BA13 4 NO FTNDM SP UNABL2UNDST

ba1rsngftstd R1 BA13 9 NO FTNDM OTHER SPECIFY



ONE LEG STAND EYES OPEN

- Reset stopwatch to 0:00'00"00

Now I'll show you the fourth movement.



I want you to try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can. I will stop you at 30 seconds.

You may use your arms, bend your knees, or move your body to keep your balance. Try not to move the foot on which you are standing and try not to let your legs touch each other. Try to hold this position until I tell you to stop. If you feel you are losing your balance take a step. I'll hold you up until you feel stable.

Do you think it would be safe to try this?

BA14

YES 

NO

GO TO BA15 3. Not attempted 

Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position: 1 foot raised

Are you ready?

YES



NO

GO TO BA15 3. Not attempted 

Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 30 seconds if SP is still holding position, say:

Stop.

42625



ONE LEG STAND EYES OPEN — RESULTS

ba11leoreslt R1 BA15 ONE LEG STAND EYES OPEN

BA15

<input type="checkbox"/> 1. COMPLETED, HELD FOR 30 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 30 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
<div style="text-align: right; margin-bottom: 5px;">BA16</div> <p>Time held:</p> <div style="display: flex; align-items: center; justify-content: space-around;"> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"></div> <div style="margin: 0 10px;">/</div> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"></div> <div style="border: 1px solid black; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"></div> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> SECS 1/100 </div> <div style="background-color: #f0a; color: white; padding: 5px 10px; text-align: center; margin-top: 10px;"> GO TO WALKING COURSE p.16 </div>		<div style="text-align: right; margin-bottom: 5px;">BA17</div> <p>Reasons not attempted: <u>Mark all that apply</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; width: 100%; height: 40px; margin-top: 5px;"></div> <div style="background-color: #f0a; color: white; padding: 5px 10px; text-align: center; margin-top: 10px;"> GO TO WALKING COURSE p.16 </div>

ba11leosfsec R1 BA16A SECS HLD 1LEG EYES OPEN

ba11leohndr R1 BA16B HNRDS HLD 1LEG EYE OPEN

ba1rsn11leo R1 BA17 1 NO1LEGEO SP FLT UNSAFE

ba1rsn21leo R1 BA17 2 NO1LEGEO PRXY FLT UNSAF

ba1rsn31leo R1 BA17 3 NO1LEGEO INTR FLT UNSF

ba1rsn41leo R1 BA17 4 NO1LEGEO SP UNABL2UNDST

ba1rsn91leo R1 BA17 9 NO1LEGEO OTHER SPECIFY



ONE LEG STAND EYES CLOSED

- Reset stopwatch to 0:00'00"00

Now I'll show you the last of these movements.



This time I want you to close your eyes and try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can. I will stop you at 30 seconds.

You may use your arms, bend your knees, or move your body to keep your balance. Try not to move the foot on which you are standing and try not to let your legs touch each other. Try to hold this position until I tell you to stop. If you feel you are losing your balance take a step. I'll hold you up until you feel stable.

Do you think it would be safe to try this?

BA18

YES

NO

GO TO BA19 3. Not attempted

Please close your eyes. When you are ready, lift one leg off the ground a few inches. I will not let go until you say you are ready.

Help SP into position:

- Support SP's elbow with one hand while standing slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position: 1 foot raised and eyes closed

Are you ready?

YES



NO

GO TO BA19 3. Not attempted

Ready, begin.

- Start stopwatch
- Remove support hand
- Step back half a step. Keep your hands near SP's elbow and back

After 30 seconds if SP is still holding position, say:

Stop.

42625



ONE LEG STAND EYES CLOSED — RESULTS

ba11lecreslt R1 BA19 ONE LEG STAND EYES CLOS

BA19

<input type="checkbox"/> 1. COMPLETED, HELD FOR 30 SEC	<input type="checkbox"/> 2. ATTEMPTED, NOT HELD FOR 30 SEC	<input type="checkbox"/> 3. NOT ATTEMPTED
		BA20
Time held:  SECS 1/100		
 WALKING COURSE Next Page		
Reasons not attempted: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 40px; width: 100%;"></div> 		
 WALKING COURSE Next Page		

ba11lecsfsec R1 BA20A SECS HLD 1LEG EYES CLOS

ba11lechndr R1 BA20B HNRDS HLD 1LEG EYE CLOS

ba1rsn11lec R1 BA21 1 NO1LEGEC SP FLT UNSAFE

ba1rsn21lec R1 BA21 2NO1LEGEC PRXY FLT UNSAF

ba1rsn31lec R1 BA21 3 NO1LEGEC INTR FLT UNSF

ba1rsn41lec R1 BA21 4NO1LEGEC SP UNABL2UNDST

ba1rsn91lec R1 BA21 9NO1LEGEC OTHER SPECIFY



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WALKING COURSE

Walking Course Administration:

WA1

YES 

NO

GO TO CHAIR STANDS p.22 

- Get out walking course chain & masking tape
- Look for appropriate space for course (16' x 3'), you may need to use a hallway or nearby room
- Find as smooth a surface as possible to lay out the course. Avoid high-pile carpet
- Do not lay course out over the edge of a rug, a throw rug, or any irregular surface
- Clear any obstacles from activity area (move small furniture, only with permission)

Is there an appropriate space to set up the walking course?

WA2

YES 

NO

GO TO WA5 3. Not attempted 

- Lay out chain straight down center of course area. Tape each end to the floor
- Using an arm's length of masking tape, place tape lengths under the two colored links of chain
- Untape chain from floor, leaving only taped start and finish lines

wa1wlkcorspc R1 WA2 WALKING COURSE SPACE



WALKING COURSE 1

- Reset stopwatch to 0:00'00"00

This is our walking course. I want you to walk to the other end of the course at your usual speed, just as if you were walking down the street to go to the store. Walk all the way past the other end of the tape before you stop. I will walk with you.



- Demonstrate starting from start line and walking completely past end line

WA3

WA3a	Do you think it would be safe to try this?		
<input type="checkbox"/>	<input type="checkbox"/> YES		<input type="checkbox"/> NO GO TO WA5 <input checked="" type="checkbox"/> 3. Not attempted
WA3b	Do you think it would be safe to try this <u>without</u> a cane or walker?		
<input type="checkbox"/>	<input type="checkbox"/> YES		<input type="checkbox"/> NO ASK WA3c
WA3c	You may use a cane or walker if you need to. Do you think it would be safe to try this?		
<input type="checkbox"/>	<input type="checkbox"/> YES		<input type="checkbox"/> NO GO TO WA5 <input checked="" type="checkbox"/> 3. Not attempted

Help SP into position:

- Stand slightly behind and to the side
► Hold stopwatch behind SP's back
► Check SP's feet position: both feet on start line

When I want you to start, I will say "Ready, begin."

YES



NO

GO TO WA5 3. Not attempted

Ready, begin.

- Start stopwatch when either of SP's feet moves
► Walk slightly behind and to the side of SP
► Stop timing when one of SP's feet completely crosses end line

42625



WALKING COURSE 1 — RESULTS

wa1wkaidused R1 WA4 WALKING AID USED COURSE 1

WA4

Aid used:

- 1. None
- 2. Cane
- 3. Walker or rollator
- 9. Other, specify:

wa1wlkc1rslt R1 WA5 WALKING COURSE 1 RESULT

WA5

<input type="checkbox"/> 1. COMPLETED WA6	<input type="checkbox"/> 2. ATTEMPTED GO TO CHAIR STANDS p.22	<input type="checkbox"/> 3. NOT ATTEMPTED WA7
<p>Completion time:</p>  <div style="display: flex; justify-content: space-around; width: 100%;"> SECS 1/100 </div> <p>WALKING COURSE 2 Next Page</p>	<p>Reasons not attempted: <u>Mark all that apply</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 5. No appropriate space <input type="checkbox"/> 9. Other, specify: <input style="width: 150px; height: 50px; border: 1px solid black; margin-top: 10px;" type="text"/> <p>GO TO CHAIR STANDS p.22</p>	



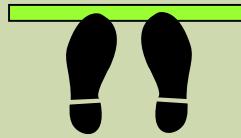
WALKING COURSE 2

- Reset stopwatch to 0:00'00"00

Now I want you to repeat the walk. Remember to walk at your usual pace, and go all the way past the tape at the other end of the course.

Help SP into position:

- Stand slightly behind and to the side
- Hold stopwatch behind SP's back
- Check SP's feet position: both feet on start line



When I want you to start, I will say "Ready, begin."

YES



NO

GO TO WA9 3. Not attempted

Ready, begin.

- Start stopwatch when either of SP's feet moves
- Walk slightly behind and to the side of SP
- Stop timing when one of SP's feet completely crosses end line

wa1rsn11wkc	R1 WA7 1 WLKCOURS1 SP FLT UNSAFE
wa1rsn21wkc	R1 WA7 2WLKCOURS1 PRXY FLT UNSAF
wa1rsn31wkc	R1 WA7 3WLKCOURS1 INTR FLT UNSF
wa1rsn41wkc	R1 WA7 4WLKCOURS1 SP UNABL2UNDST
wa1rsn51wkc	R1 WA7 5WLKCOURS1 NOT APPR SPACE
wa1rsn91wkc	R1 WA7 9WLKCOURS1 OTHER SPECIFY



WALKING COURSE 2 — RESULTS

wa1wa1wkaidusc2 R1 WA8 WALKING AID USED COURSE 2 WA8

Aid used:

- 1. None
- 2. Cane
- 3. Walker or rollator
- 9. Other, specify:

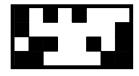
wa1wlkc2rslt R1 WA9 WALKING COURSE 2 RESULT WA9

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
WA10 Completion time: SECS 1/100 CHAIR STANDS Next Page	 CHAIR STANDS Next Page	WA11 Reasons not attempted: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <input style="width: 150px; height: 1.2em; border: 1px solid black; margin-left: 10px;" type="text"/> CHAIR STANDS Next Page

wa1rsn12wkc R1 WA11 1 WKCOURS2 SP FLT UNSAFE
 wa1rsn22wkc R1 WA11 2 WKCOURS2 PRXY FLT UNSAF
 wa1rsn32wkc R1 WA11 3 WKCOURS2 INTR FLT UNSF
 wa1rsn42wkc R1 WA11 4 WKCOURS2 SP UNABL2UNDST
 wa1rsn92wkc R1 WA11 9 WKCOURS2 OTHER SPECIFY



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CHAIR STANDS

Chair Stands Administration:

CH1

YES 

NO

GO TO GRIP STRENGTH p.28

- Look for appropriate chair(s) for activity (hard back and preferably no arms), you may need to look in a hallway or nearby room
- An SP in a wheelchair can use it as a chair if SP can get up from it without help

Is there an appropriate chair available?

ch1chravail

R1 CH2 APPROPRIATE CHAIR AVAIL

CH2

YES 

NO

GO TO CH7 ☑ 3. Not attempted

- Place chair for SP with its back against a wall or other solid vertical surface
- Get out measuring tape
- When measuring chair height, ignore plush removable cushions, and always round down to nearest inch



SINGLE CHAIR STAND

Next I'm going to ask you to stand up, keeping your arms folded across your chest. I want you to fold your arms across your chest and sit so that your feet are on the floor. Then, I'll ask you to stand up, keeping your arms folded across your chest.

Demonstrate standing from a seated position with your arms folded across your chest

Do you think it would be safe to try this?

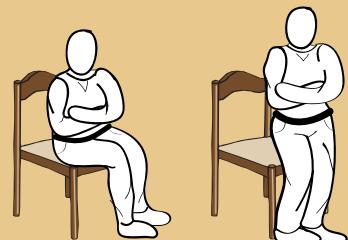
CH3

YES 

NO

GO TO CH7 3. Not attempted 

- Check SP's chair is secure against wall
- Stand in front of SP
- Check SP's position: sitting with arms folded over chest



Are you ready?

YES



NO

GO TO CH7 3. Not attempted 

Stand.

ch1chstcompl R1 CH4 CHAIR STND COMPLETED TRY1 CH4

NOT COMPLETED 

COMPLETED

GO TO CH5 Record chair height 

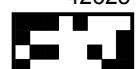
Let's try again, this time using your arms.

- Check SP's position: sitting

Are you ready?

- Confirm SP is ready

Stand.



SINGLE CHAIR STAND — RESULT

CH5	CH6
Chair Height: <input style="width: 40px; height: 40px; border: 1px solid black; vertical-align: middle;" type="text"/> <input style="width: 40px; height: 40px; border: 1px solid black; vertical-align: middle;" type="text"/> INCHES	<input type="checkbox"/> WHEELCHAIR USED

ch1chairheit R1 CH5 CHAIR HEIGHT(INCHES)
 ch1whlchrusd R1 CH6 WHEELCHAIR USED
 ch1sgchstres R1 CH7 SINGLE CHAIR STAND RESLT

CH7	CH8	CH9
<input type="checkbox"/> 1. COMPLETED <input type="checkbox"/> 2. ATTEMPTED <input type="checkbox"/> 3. NOT ATTEMPTED	<input type="checkbox"/> 1. With arms GO TO GRIP STRENGTH p.28 <input type="checkbox"/> 2. Without arms  REPEATED CHAIR STANDS Next Page	Reasons not attempted: <u>Mark all that apply</u> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 5. No appropriate chair <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; width: 100%; height: 40px; margin-top: 5px;"></div> GO TO GRIP STRENGTH p.28

ch1armuse R1 CH8 CHAIR STAND ARM USE
 ch1rsn11chs R1 CH9 1CH STAND1 SP FLT UNSAFE
 ch1rsn21chs R1 CH9 2CH STAND1 PRXY FLT UNSAF
 ch1rsn31chs R1 CH9 3CH STAND1 INTR FLT UNSF
 ch1rsn41chs R1 CH9 4CH STAND1 SP UNABL2UNDST
 ch1rsn51chs R1 CH9 5CH STAND1 NOT APPR CHAIR
 ch1rsn91chs R1 CH9 9CH STAND1 OTHER SPECIFY

REPEATED CHAIR STANDS

Now, I'm going to ask you to do the same movement, but this time as QUICKLY as you can 5 times without stopping in between. After standing up each time, sit back down and then stand up again. Remember to keep your arms folded across your chest. I will count out loud as you stand "1, 2, 3, 4, 5" and time you with a stopwatch.

- Demonstrate standing from a seated position with your arms folded across your chest

Do you think it would be safe to try this?

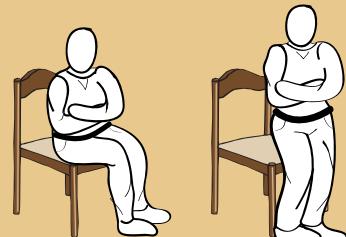
CH10

YES 

NO

GO TO CH12 3. Not attempted 

- Stand in front of SP
► Reset stopwatch to 0:00'00"00.
► Check SP's position: sitting with arms folded over chest



Are you ready?

YES



NO

GO TO CH12 3. Not attempted 

Stand.

- Start stopwatch
► Count the number of stands out loud (1, 2, 3, 4, 5) each time SP rises

- Stop timing when SP has stood up the 5th time

GO TO CH12 1. Completed 

- Stop timing if: SP uses his/her arms, has not completed 5 stands in 1 minute, or you become concerned for SP's safety

GO TO CH12 2. Attempted 

If SP becomes tired, short of breath, or stops before completing 5 stands, ask:

Can you continue?

CH11

YES 

NO

GO TO CH12 2. Attempted 

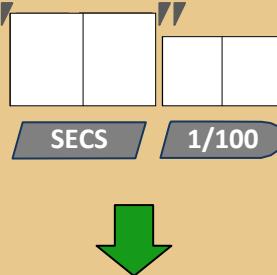
- Continue counting & timing

42625



REPEATED CHAIR STANDS — RESULTS

ch12chstrslt R1 CH12 REPEAT CHAIR STAND RSLTS **CH12**

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
CH13	CH14	CH16
Completion time:  SECS 1/100	# of stands completed: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	Reasons not attempted: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>
CH15		Reasons not completed: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP became tired or short of breath <input type="checkbox"/> 2. SP used SP's arms <input type="checkbox"/> 3. All stands not completed in 1 min <input type="checkbox"/> 4. You were concerned for SP's safety <input type="checkbox"/> 5. SP stopped and was unable to continue <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>
 GRIP STRENGTH Next Page		
 GRIP STRENGTH Next Page		

ch1chstndsec R1 CH13A TIME REPEAT CH STD SECS
 ch1chstdhndr R1 CH13B TIME RPEAT CH STD HNRDS
 ch1chstddone R1 CH14 NUMBER CHAIR STANDS DONE
 ch1chstndn1 R1 CH15 1 CH STD SP TIRED
 ch1chstndn2 R1 CH15 2 CH STD SP USED ARMS
 ch1chstndn3 R1 CH15 3 CH STD OVER 1 MIN
 ch1chstndn4 R1 CH15 4 CH STD CNCRN SP SAFETY

ch1chstndn5 R1 CH15 5 CH STD SP STOPPED
 ch1chstndn9 R1 CH15 9 CH STD OTHERSPECIFY
 ch1chstntat1 R1 CH16 1 NO CH ST SP UNSAFE
 ch1chstntat2 R1 CH16 2 NO CH ST PRXY UNSAFE
 ch1chstntat3 R1 CH16 3 NO CH ST INTV UNSAFE
 ch1chstntat4 R1 CH16 4 NO CH ST SP UNAB2UNDST
 ch1chstntat9 R1 CH16 9 NO CH ST OTHER SPEC



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GRIP STRENGTH

Grip Strength Administration:

<input type="checkbox"/> YES RIGHT	<input type="checkbox"/> YES LEFT		<input type="checkbox"/> NO	GR1
GO TO WAIST CIRCUMFERENCE p.34 				

- Remove the dynamometer from its case. If the display shows no numbers, press  to turn on
- As marked in grip strength administration box, set "L" for left hand, or "R" for right hand. Press  until the correct letter appears
- Set the number of trials to 1. If needed, press  until 1 appears
- Wipe dynamometer handle with an antibacterial cloth

- Make sure readings are displaying in KG
- If SP has a very large hand, you can adjust the grip position to 3
- If no numbers appear on the dynamometer display when you turn it on, check that the batteries are connected properly, and replace them if necessary



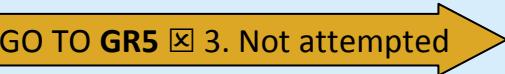
GRIP STRENGTH 1

Next, I'm going to ask you to try to squeeze this handle using your (right/left) hand.

- Demonstrate grip position while sitting with your arm in an L shape, and the dynamometer or forearm resting on a stable surface

First, bend your elbow with your arm against your side. Then grab the two pieces of metal together like this and squeeze as hard as you can. The metal will not move, but the display will give me a measure of your grip. I will ask you to do this 2 times with the same hand. If you feel any pain or discomfort, tell me, and we will stop.

Do you think it would be safe to try this?

GR2		
<input type="checkbox"/> YES		<input type="checkbox"/> NO GO TO GR5 <input checked="" type="checkbox"/> 3. Not attempted 

- Press the "TEST" button and then hand dynamometer to SP

Please get in position, but don't squeeze until I say "begin." Hold the handle while you bend your elbow with your arm against your side.

- Check SP's position: sitting with arm in L shape

Are you ready?

YES		NO	GO TO GR3 <input checked="" type="checkbox"/> Hand tested 
-----	---	----	--

Begin.

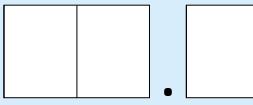
When SP begins squeezing, say:

Squeeze, squeeze, squeeze!

When the numbers on the display stop changing, say:

Stop.

GRIP STRENGTH 1 — RESULTS

GR3 Hand tested: <input type="checkbox"/> RIGHT <input type="checkbox"/> LEFT	GR4 <input type="checkbox"/> GRIP POSITION SET TO 3	<small>gr1handtstd1 R1 GR3 GRIP1 TEST WHICH HAND</small> <small>gr1ad gr1ps3 R1 GR4 GRIP1POSITION ADJUST TO 3</small>
<input type="checkbox"/> 1. COMPLETED <input type="checkbox"/> 2. ATTEMPTED <input type="checkbox"/> 3. NOT ATTEMPTED		GR5 Display reading:  KG ↓ GRIP STRENGTH 2 Next Page
GR6		 GO TO WAIST CIRCUMFERENCE p.34 →
GR7		Reasons not attempted: <u>Mark all that apply</u> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: <div style="border: 1px solid black; height: 50px; width: 100%;"></div>
 GO TO WAIST CIRCUMFERENCE p.34 → 		

gr1grp1reslt R1 GR5 GRIP STRENGTH 1 RESULT
 gr1grp1rdng R1 GR6 GRP1 DISPLAY READING
 gr1grp1noat1 R1 GR7 1 SP FELT UNSAFE
 gr1grp1noat2 R1 GR7 2 PROXY FELT UNSAFE
 gr1grp1noat3 R1 GR7 3 INTERVIEWR FELT UNSAFE
 gr1grp1noat4 R1 GR7 4 SP UNABLE 2 UNDERSTAND
 gr1grp1noat9 R1 GR7 9 OTHER SPECIFY



GRIP STRENGTH 2

- Press the "RESET" button to set display back to 0.0
- Press the "TEST" button and then hand dynamometer to SP

Now let's try a second time. Remember to hold the handle while you bend your elbow and with your arm against your side, but don't squeeze until I say "begin."

- Check SP's position: sitting with arm in L shape

Are you ready?

YES



NO

GO TO GR10 3. Not attempted

Begin.

When SP begins squeezing, say:

Squeeze, squeeze, squeeze!

When the numbers on the display stop changing, say:

Stop.



GRIP STRENGTH 2 — RESULTS

<p>GR8</p> <p>Hand tested:</p> <p><input type="checkbox"/> RIGHT <input type="checkbox"/> LEFT</p>	<p>GR9</p> <p><input type="checkbox"/> GRIP POSITION SET TO 3</p>	<p>gr1handtstd2 R1 GR8 GRIP2 TEST WHICH HAND gr1adjgr2ps3 R1 GR9 GRIP2POSITION ADJUST TO 3</p>
		<p>gr1grp2reslt R1 GR10 GRIP STRENGTH 2 RESULT GR10</p>
<p><input type="checkbox"/> 1. COMPLETED</p>	<p><input type="checkbox"/> 2. ATTEMPTED</p>	<p><input type="checkbox"/> 3. NOT ATTEMPTED</p>
<p>GR11</p> <p>Display reading: . KG</p>		<p>GR12</p> <p>Reasons not attempted: <u>Mark all that apply</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify:
<p> WAIST CIRCUMFERENCE Next Page</p>		<p> WAIST CIRCUMFERENCE Next Page</p>

gr1grp2reslt R1 GR10 GRIP STRENGTH 2 RESULT

gr1grp2rdng R1 GR11 GRP2 DISPLAY READING

gr1grp2noat1 R1 GR12 1 SP FELT UNSAFE

gr1grp2noat2 R1 GR12 2 PROXY FELT UNSAFE

gr1grp2noat3 R1 GR12 3 INTERVIEWER FELT UNSAFE

gr1grp2noat4 R1 GR12 4 SP UNABLE 2 UNDERSTAND

gr1grp2noat9 R1 GR12 9 OTHER SPECIFY



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WAIST CIRCUMFERENCE

- Wipe down flexible measuring tape with antibacterial cloth.
- Determine position for SP to perform activity:
 - If SP can stand unassisted, perform activity with SP **standing up**
 - If SP cannot stand or has difficulty, perform activity with SP **sitting**
 - If SP cannot sit unassisted, perform activity with SP **lying down**
- When administering activity, check that measuring tape:
 - Is horizontal all the way around SP's waist
 - Is lined up with SP's navel
 - Is snug but not tight
 - Has large numbers facing out
 - Has end that starts with 1" overlapping end with higher numbers



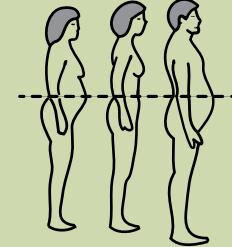
WAIST CIRCUMFERENCE

Next I'm going to measure your waist circumference. While standing up, I will ask you to place this soft measuring tape around your waist, over your clothing, holding it securely at the level of your navel or belly button.

- Demonstrate wrapping measuring tape around navel

Once the tape measure is in place, I will ask you to take a normal breath and exhale, holding your breath at the end of the exhale. I will then record the measurement.

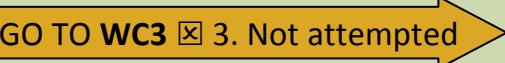
Do you think it would be safe to try this?



WC1

YES 

NO

GO TO WC3 3. Not attempted 

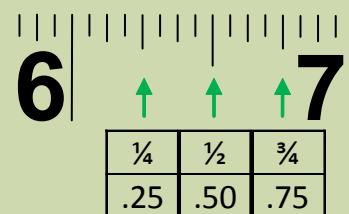
Please point to your navel. Now take this measuring tape and place it around your waist at the level of your navel.

- If SP cannot wrap measuring tape around waist by self, have SP hold one end at navel while you bring around other end, then hand to SP.

Please take a normal breath and exhale, holding your breath at the end of the exhale.

- Record measurement on the tape to the nearest $\frac{1}{4}$ inch after SP exhales

You can stop now.



WAIST CIRCUMFERENCE — RESULTS

Variable names & labels on p. 37 WC2

Measurement difficulties (mark all that apply):

- 1. None
- 2. SP had breathing difficulties
- 3. SP unable to hold breath at end of exhale
- 4. SP gave less than full effort due to illness, pain, or other symptoms or discomfort
- 5. SP gave less than full effort for non-health reason
- 6. SP had difficulty or unable to locate navel
- 9. Other, specify:

WC3

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
Tape measure reading: <input style="width: 25px; height: 1.2em; border: 1px solid black; margin-right: 10px;" type="text"/> . <input style="width: 25px; height: 1.2em; border: 1px solid black; margin-right: 10px;" type="text"/> INCHES	WC4 PEAK AIR FLOW Next Page	WC8 Reasons not attempted: Mark all that apply <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 5. SP Refused <input type="checkbox"/> 9. Other, specify: <input style="width: 150px; height: 40px; border: 1px solid black; margin-top: 10px;" type="text"/>
Measured by: <input type="checkbox"/> 1. You <input type="checkbox"/> 2. SP	WC6 PEAK AIR FLOW Next Page	WC7 PEAK AIR FLOW Next Page



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wc1measdiff1	R1 WC2 1 MEAS DIFF NONE
wc1measdiff2	R1 WC2 2 MEAS DIFF DIFF BREATH
wc1measdiff3	R1 WC2 3 MEAS DIFF NOHOLD BREATH
wc1measdiff4	R1 WC2 4 MEAS DIFF EFFORT PAIN
wc1measdiff5	R1 WC2 5 MEAS DIFF EFFORT OTHER
wc1measdiff6	R1 WC2 6 MEAS DIFF LOCATE NAVEL
wc1measdiff9	R1 WC2 9 MEAS DIFF OTHER SPECIFY
wc1waistrslt	R1 W3 WAIST CIRCUMFRNC RESULTS
wc1wstmsrinc	R1 W4A WAIST MEASURE INCHES
wc1wstmsrqrt	R1W4B WAIST MEASURE QTR INCHES
wc1wstbulkcl	R1 WC5 BULKY CLOTHING WORN
wc1whomeasur	R1 WC6 WHO MEASURED
wc1wstpostn	R1 WC7 POSITION 4 WAIST MEASURE
wc1wstnotat1	R1 WC8 1 NO WC SP FELT UNSAFE
wc1wstnotat2	R1 WC8 2 NO WC PROXY UNSAFE
wc1wstnotat3	R1 WC8 3 NO WC INTERVIEWR UNSAFE
wc1wstnotat4	R1 WC8 4 NO WC SP UNABLE2UNDRSTD
wc1wstnotat5	R1 WC8 5 NO WC SP REFUSED
wc1wstnotat9	R1 WC8 9 NO WC OTHER SPECIFY



PEAK AIR FLOW

- Remove peak air flow meter from case and wipe with antibacterial cloth
- Attach interviewer cardboard mouthpiece to meter
- Determine position for SP to perform activity:
 - If SP can stand unassisted, perform activity with SP **standing up**
 - If SP cannot stand or has difficulty, perform activity with SP **sitting**
 - If SP cannot sit unassisted, perform activity with SP **lying down**
- Allow for **at least 30 seconds** between SP attempts
- When reading peak air flow meter, if the sliding marker falls between two hash marks, round **down** to the next number



PEAK AIR FLOW 1

Now I'm going to ask you to perform a simple activity that will measure how fast you can push out air from your lungs. When you blow into this instrument, the value of the biggest, fastest "huff" of air will be recorded. It is important that you blow as hard and as fast as you can. I would like you to perform the activity 2 times.

When we are ready to begin, I'll ask you to get into position. Take as deep a breath as possible. Open your mouth and close your lips firmly around the outside of the mouthpiece, and then blow as hard and as fast as you can into the mouthpiece. Like this.

- Demonstrate activity position and movement

Do you think it would be safe to try this?

PK1

YES 

NO

GO TO PK4 3. Not attempted 

- Remove interviewer mouthpiece from meter
- Help SP into position, hand meter to SP
- Open sealed bag with SP mouthpiece

Please take this new mouthpiece out of the bag and fit it into the meter. Tap it lightly with the palm of your hand to make sure it is firmly attached.

- Check SP's position: mouthpiece attached, meter in hands, fingers clear of sliding marker and air holes
- Reset meter to 0

Please take a deep breath, place your lips around the outside of the mouthpiece, and blow as hard and as fast as you can into the mouthpiece.



PEAK AIR FLOW 1 — RESULTS

pk1pkarf1pos R1 PK2 PEAK AIR FLOW 1 POSITION PK2

Activity position:

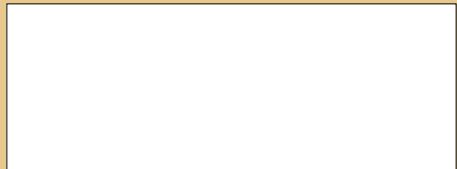
- 1. Standing
- 2. Sitting
- 3. Lying down

pk1pkarf1ef R1 PK3 PK AIR FLW 1 EFFORT GIVEN PK3

Effort given:

- 1. Full effort
- 2. SP gave less than full effort due to illness, pain, or other symptoms or discomfort
- 3. SP gave less than full effort for non-health reason

pk1pkarf1rs R1 PK4 PEAK AIR FLOW 1 RESULT PK4

<input type="checkbox"/> 1. COMPLETED	<input type="checkbox"/> 2. ATTEMPTED	<input type="checkbox"/> 3. NOT ATTEMPTED
PK5		PK6
Meter reading:  L/MIN	 PEAK AIR FLOW 2 Next Page	Reasons not attempted: <u>Mark all that apply</u> <ul style="list-style-type: none"> <input type="checkbox"/> 1. SP felt unsafe <input type="checkbox"/> 2. Proxy felt unsafe for SP <input type="checkbox"/> 3. You felt unsafe for SP/SP unsteady with support <input type="checkbox"/> 4. SP unable to understand directions <input type="checkbox"/> 9. Other, specify: 
 PEAK AIR FLOW 2 Next Page		
 GO TO CLOSING p.44		



PEAK AIR FLOW 2

► *Reset meter to 0*

Now let's try a second time. Again, place your lips around the outside of the mouthpiece, and blow as hard and as fast as you can into the mouthpiece.

pk1pkarfl1rd R1 PK5 PEAK AIR FLOW 1 READING
pk1pk1noatt1 R1 PK6 1 PEAK NO SP FELT UNSAFE
pk1pk1noatt2 R1 PK6 2 PEAK NO PROXY UNSAFE
pk1pk1noatt3 R1 PK6 3 PEAK NO INTERVWR UNSAFE
pk1pk1noatt4 R1 PK6 4 PEAK NO SP UNABL2UNDSTD
pk1pk1noatt9 R1 PK6 9 PEAK NO OTHER SPECIFY



PEAK AIR FLOW 2 — RESULTS

pk1paf2posit R1 PK7 PEAK AIR FLOW 2 POSITION PK7

Activity position:

- 1. Standing
- 2. Sitting
- 3. Lying down

pk1pkaf13eff R1 PK8 PEAK AIR FLW 2 EFFRT GIVN PK8

Effort given:

- 1. Full effort
- 2. SP gave less than full effort due to illness, pain, or other symptoms or discomfort
- 3. SP gave less than full effort for non-health reason

pk1pkarfl2rs R1 PK9 PEAK AIR FLOW 2 RESULT PK9

1. COMPLETED

2. ATTEMPTED

3. NOT ATTEMPTED

PK10

Meter reading:

--	--	--

L/MIN


CLOSING
Next Page


CLOSING
Next Page

PK11

Reasons not attempted:
Mark all that apply

- 1. SP felt unsafe
- 2. Proxy felt unsafe for SP
- 3. You felt unsafe for SP/SP unsteady with support
- 4. SP unable to understand directions
- 9. Other, specify:


CLOSING
Next Page

42625



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pk1pkarfl2rd	R1 PK10 PEAK AIR FLOW 2 READING
pk1pk2noatt1	R1 PK11 1 PEAK NO SP FELT UNSAFE
pk1pk2noatt2	R1 PK11 2 PEAK NO PROXY UNSAFE
pk1pk2noatt3	R1 PK11 3 PEAK NO INTRVWR UNSAFE
pk1pk2noatt4	R1 PK11 4 PEAK NO SP UNABL2UNDST
pk1pk2noatt9	R1 PK11 9 PEAK NO OTHER SPECIFY
ba1dblssadm	R1 D BALANCE SIDE BY SIDE ADMIN
ba1dblstadm	R1 D BALANCE SEMI TANDEM ADMIN
ba1dblftadm	R1 D BALANCE FULL TANDEM ADMIN
ba1dblopadm	R1 D BALANCE 1 LEG OP EYE ADMIN
ba1dblcladm	R1 D BALANCE 1 LEG CLS EYE ADMIN
wa1dwlkadm	R1 D WALKING COURSE ADMIN
ch1dschradm	R1 D SINGLE CHAIR ADMIN
ch1drchradm	R1 D REPEAT CHAIR ADMIN
gr1dgripadm	R1 D GRIP STRENGTH ADMIN
wc1dwaistadm	R1 D WAIST CIRCUMFERENCE ADMIN
pk1dpeakadm	R1 D PEAK AIR FLOW ADMIN
r1dnhatssppb	R1 D NHATS SPPB SCORE
r1dnhatbsasc	R1 D NHATS BALANCE SCORE
r1dnhatswksc	R1 D NHATS WALK SCORE
r1dnhatschsc	R1 D NHATS REPEAT CHAIR SCORE
r1dnhatsgrav	R1 D NHATS AVG GRIP SCORE
r1dnhatsgrb	R1 D NHATS BEST GRIP SCORE
r1dnhatspkav	R1 D NHATS AVG AIR FLOW SCORE
r1dnhatspkb	R1 D NHATS BEST AIR FLOW SCORE
r1dsppbmiss	R1 D REASON MISSING SPPB
r1dorigsppb	R1 D ORIGINAL SPPB SCORE
r1dorigbasc	R1 D ORIGINAL BALNCE SCORE
r1dorigwksc	R1 D ORIGINAL WALK SCORE
r1dorigchsc	R1 D ORIGINAL REPEAT CHAIR SCORE

CLOSING

Record end time:

<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>
HRS		MINS		

AM
PM

Put away all equipment:

- Remove SP mouthpiece from peak flow meter and put in trash bag
- Place peak flow meter and dynamometer in proper cases
- Remove all tape from floor
- Gather up all trash, put in bag
- Put all equipment in NHATS tote bag
- Return any borrowed chairs to original area
- Rearrange any moved furniture to original position

GO TO CAPI

cl1endtimhrs R1 CL1 HRS END TIME HOURS

cl1endtimmin R1 CL1 MINS END TIME MINUTES

cl1endtmampm R1 CL1 AMPM END TIME AM OR PM



NHATS Round 1

Section HW [HEIGHT AND WEIGHT]

Sequence: 31

HW1PRE

HW1PRE

NOT ON FILE

QUESTION TEXT

Now, I have a few questions about {your/SP's} height and weight.

PRESS 1 AND ENTER TO CONTINUE

HW2

hw1currweigh

R1 HW2 YOU CURRENTLY WEIGH

QUESTION TEXT:

How much {do you/does SP} currently weigh?

ENTER WEIGHT IN POUNDS

ENTER NUMBER

Range	65 to 600
Soft Range	90 to 300
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 65-600.

Soft range: 90-300.

HW3

hw1weightat50

R1 HW3 WEIGH AT ABOUT AGE 50

DISPLAY INSTRUCTIONS:

Display "age 50" in bold underlined text.

QUESTION TEXT:

What was {your/SP's} usual weight at about age 50? If you don't remember exactly, please make your best guess.

ENTER WEIGHT IN POUNDS

ENTER NUMBER

Range	65 to 600
Soft Range	90 to 300
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard range: 65-600.

Soft range: 90-300.

HW4

hw1lst10pnds

R1 HW4 LOST 10 POUNDS IN LAST YR

DISPLAY INSTRUCTIONS:

Display “lost 10 or more pounds” in bold underlined text.

QUESTION TEXT:

{Have you/Has SP} lost 10 or more pounds in the last 12 months?

CODES

1	YES	
2	NO	HW7
	REFUSED	HW7
	DON'T KNOW	HW7

HW5**hw1trytolose**

R1 HW5 WERE YOU TRYNG LOSE WEGHT

QUESTION TEXT:

{Were you/Was SP} trying to lose weight?

CODES

1	YES	
2	NO	
	REFUSED	
	DON'T KNOW	

HW7**hw1howtallft**

R1 HW7 HOW TALL ARE YOU FEET

DISPLAY INSTRUCTIONS:

Display HW7 and HW8 on the same screen.

QUESTION TEXT:

How tall {are you/is SP}?

ENTER HEIGHT IN FEET

ENTER NUMBER

Range	3 to 7
Soft Range	4 to 6
REFUSED	HW9
DON'T KNOW	HW9

PROGRAMMER INSTRUCTIONS:

Hard range: 3-7.

Soft range: 4-6.

HW8**hw1howtallin**

R1 HW8 HOW TALL ARE YOU INCHES

DISPLAY INSTRUCTIONS:

Display HW7 and HW8 on the same screen.

QUESTION TEXT:

[How tall {are you/is SP?}]

ENTER HEIGHT IN INCHES

ENTER NUMBER

Range	0 to 11
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: 0-11

HW9**hw1tal50feet**

R1 HW9 HOW TALL AT AGE 50 FEET

DISPLAY INSTRUCTIONS:

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

QUESTION TEXT:

How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.

ENTER HEIGHT IN FEET

ENTER NUMBER

Range	3 to 7
Soft Range	4 to 6
REFUSED	SECTION EL
DON'T KNOW	SECTION EL

PROGRAMMER INSTRUCTIONS:

Hard range: 3-7.

Soft range: 4-6.

HW10**hw1tal50inch**

R1 HW10 HOW TALL AT AGE 50 INCHES

DISPLAY INSTRUCTIONS:

Display HW9 and HW10 on the same screen.

Display "age 50" in bold underlined text.

QUESTION TEXT:

[How tall {were you/was SP} without shoes at about age 50? If you don't remember exactly, please make your best guess.]

ENTER HEIGHT IN INCHES

ENTER NUMBER

Range	0 to 11
-------	---------

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range 0-11

Go to Section EL - Early Life

NHATS Round 1

Section EL [EARLY LIFE]

Sequence: 32

EL1PRE

EL1PRE

NOT ON FILE

QUESTION TEXT

Now I want to ask a few questions about when {you were/SP was} younger.

PRESS 1 AND ENTER TO CONTINUE

EL1

el1borninus

R1 EL1 WERE YOU BORN IN THE US

QUESTION TEXT:

{Were you/Was SP} born in the United States?

CODES

1	YES	
2	NO	EL3
	REFUSED	EL3
	DON'T KNOW	EL3

EL2

el1stateborn (Restricted)

R1 EL2 WHAT STATE WERE YOU BORN

QUESTION TEXT:

In what state {were you/was SP} born?

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

REFUSED	EL5
DON'T KNOW	EL5

PROGRAMMER INSTRUCTIONS:

Use lookup file of state names.

Display response label for state name selected.

All responses skip to EL5.

EL3

el1cntryborn (Restricted)

R1 EL3 WHAT CONTRY WERE YOU BORN

QUESTION TEXT:

In what country {were you/was SP} born?

TYPE THE FIRST 3 LETTERS OF THE COUNTRY. THEN USE ARROW KEYS TO LOCATE COUNTRY, AND
PRESS ENTER TO SELECT. IF COUNTRY IS NOT LISTED, SELECT 'NOT ON LIST'

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use the 'Country List' as lookup file.
Enable alphabetic search.
Display response label for country selected
If "NOT ON LIST SELECTED", go to EL3a.
Otherwise, go to EL4a.

EL3A**EL3A**

NOT ON FILE

QUESTION TEXT:

SPECIFY COUNTRY OF BIRTH

ENTER TEXT

ENTER TEXTLength 50

EL4A**el1dage2us**

R1 D AGE CAME TO US

QUESTION TEXT:

In about what year did {you/SP} first come to live in the United States?

ENTER YEAR [EL5]

ENTER NUMBERREFUSED EL5
DON'T KNOW**PROGRAMMER INSTRUCTIONS:**

Hard range CURRENT YEAR – 110
Soft range CURRENT YEAR – 65

If year entered is ≤ SP BIRTH YEAR from IS6, display error message "INVALID RESPONSE. YEAR CAME TO UNITED STATES CANNOT BE EARLIER THAN SP BIRTH YEAR."

EL4B**el1dage2us**

R1 D AGE CAME TO US

QUESTION TEXT:

At about what age did {you/SP} first come to live in the United States?

IF LESS THAN 1 YEAR OLD, ENTER 0

ENTER AGE

ENTER NUMBERRange 0 to 110
Soft Range 0 to 65
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Hard range 0-110
Soft range 0-65

If age entered > SP AGE, display error message "INVALID RESPONSE. AGE CAME TO UNITED STATES CANNOT BE GREATER THAN CURRENT AGE."

EL5**el1hlthchild**

R1 EL5 YOUR HELATH AS CHILD

QUESTION TEXT:

Thinking about when {you were/SP was} growing up, would you say that {you/his/her} health as a child was excellent, very good, good, fair, or poor?

CODES

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

EL6**el1fingrowup**

R1 EL6 WELL OFF FINANLY GROWG UP

QUESTION TEXT:

SHOW CARD EL1

How well off financially {was your/was SP's} family when {you were/{he/she} was} growing up? Was it well off, above average, average, below average, or poor?

CODES

- | | |
|---|---------------|
| 1 | WELL OFF |
| 2 | ABOVE AVERAGE |
| 3 | AVERAGE |
| 4 | BELOW AVERAGE |
| 5 | POOR |
| | REFUSED |
| | DON'T KNOW |
-

EL7**el1lvbhpars15**

R1 EL7 LIV W BTH PRNTS TO AGE 15

DISPLAY NSTRUCTIONS:

Display “both” in bold underlined text.

QUESTION TEXT:

Did {you/SP} live with both of {your/his/her} parents (birth or adopted) for most of {your/his/her} childhood up to the age of 15?

CODES

1	YES	BOX EL9
2	NO	
	REFUSED	BOX EL9
	DON'T KNOW	BOX EL9

EL8**el1lvwmofaor**

R1 EL8 LIV W MOTHER FATHR OR OTH

QUESTION TEXT:

Did {you/SP} live with {your/his/her} mother only, {your/his/her} father only, another relative, or with non-relatives?

CODES

1	MOTHER ONLY
2	FATHER ONLY
3	ANOTHER RELATIVE
4	NON-RELATIVES
5	VARIED/MOVED AROUND
	REFUSED
	DON'T KNOW

BOX EL9**BOXEL9**

NOT ON FILE

If (EL1=2 (NO, BORN OUTSIDE THE U.S.), DK, or RF) and (EL4b>15 or (EL4a-SP'S BIRTH YEAR>15)), go to EL10.
Otherwise, go to EL9a.

EL9A**el1lvctytn15 (Restricted)**

R1 EL9A WHR LIV CITY/TOWN AGE 15

QUESTION TEXT:

Where did {you/SP} live when {you were/{he/she} was} age 15?

ENTER CITY/TOWN

CONFIRM SPELLING

ENTER TEXT

Length

25

EL9B**el1stlivag15 (Restricted)**

R1 EL9B STATE LIVED AT AGE 15

QUESTION TEXT:

[Where did {you/SP} live when {you were/{he/she} was} age 15?]

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

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use the lookup file of state names.
Display response label for state name selected.

EL10**el1higstschl**

R1 EL10 HGHST DGREE SCOOL COMPLD

QUESTION TEXT:

SHOW CARD EL2

What is the highest degree or level of school {you/SP} completed?

CODES

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

BOX EL11**BOXEL11**

NOT ON FILE

If any HOUSEHOLD MEMBER RELATIONSHIP = 13 (MOTHER), set EL11=1 (YES) and go to BOX EL12.
Otherwise go to EL11

EL11**el1mothalive**

R1 EL11 YOUR MOTHER STILL LIVING

QUESTION TEXT:

Is {your/SP's} mother still living?

CODES

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

BOX EL12**BOXEL12**

NOT ON FILE

If any HOUSEHOLD MEMBER RELATIONSHIP = 16(FATHER), set EL12=1 (YES) and go to Section RL – Race,
Ethnicity, Language.
Otherwise go to EL12

EL12**e1fathalive**

R1 EL12 YOUR FATHER STILL LIVING

QUESTION TEXT:

Is {your/SP's} father still living?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section RL – Race, Ethnicity, Language.

Derived Variables from Items in EL Section

e1dage2us	R1 D AGE CAME TO US
e1dsameres	R1 D CITY STATE NOW AND AGE 15

NHATS Round 1

Section RL [RACE, ETHNICITY, LANGUAGE]

Sequence: 34

RL1PRE

RL1PRE

NOT ON FILE

QUESTION TEXT

Now we'd like to ask you some questions about {your/SP's} race and ethnic background.

PRESS 1 AND ENTER TO CONTINUE

RL1

rl1yourrace1 (Sensitive)

R1 RL1 RACE OF SP WHITE

rl1yourrace2 (Sensitive)

R1 RL1 RACE OF SP AFRICN AMERICN

rl1yourrace3 (Sensitive)

R1 RL1 RACE OF SP AMERICN INDIAN

rl1yourrace4 (Sensitive)

R1 RL1 RACE OF SP ALASKA NATIVE

rl1yourrace5 (Sensitive)

R1 RL1 RACE OF SP ASIAN

rl1yourrace6 (Sensitive)

R1 RL1 RACE OF SP NATIVE HWAIIAN

rl1yourrace7 (Sensitive)

R1 RL1 RACE OF SP PACIFIC ISLNDR

rl1yourrace8 (Sensitive)

R1 RL1 RACE OF SP OTHER SPECIFY

QUESTION TEXT:

SHOW CARD RL1

What race {do you/does SP} consider {yourself/himself/herself} to be: White, Black or African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, or something else?

SELECT ALL THAT APPLY

CODES

Code All That Apply

1	WHITE/CAUCASIAN	BOX RL2
2	BLACK/AFRICAN AMERICAN	BOX RL 2
3	AMERICAN INDIAN	BOX RL2
4	ALASKA NATIVE	BOX RL2
5	ASIAN	BOXRL2
6	NATIVE HAWAIIAN	BOX RL2
7	PACIFIC ISLANDER	BOX RL2
8	OTHER (SPECIFY)	
	REFUSED	BOX RL2
	DON'T KNOW	BOX RL2

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

RL1A

RL1A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER RACE

ENTER TEXT

Length

75

BOX RL2**BOXRL2**

NOT ON FILE

If more than one response category selected at RL1, continue.

Otherwise, go to RL3.

RL2**rl1primarace (Sensitive)**

R1 RL2 RACE CONSID YRSLF PRIMRLY

DISPLAY INSTRUCTIONS:

Display “or” between each race in question text.

In question text, display only response categories selected at RL1.

Display only response codes from categories selected at RL1.

QUESTION TEXT:

{Do you consider yourself/Does SP consider {himself/herself} primarily {RESPONSE CATEGORIES SELECTED AT RL1}?

CODES**Code All That Apply**

- | | |
|---|------------------------------|
| 1 | WHITE/CAUCASIAN |
| 2 | BLACK/AFRICAN AMERICAN |
| 3 | AMERICAN INDIAN |
| 4 | ALASKA NATIVE |
| 5 | ASIAN |
| 6 | NATIVE HAWAIIAN |
| 7 | PACIFIC ISLANDER |
| 8 | OTHER RACE SPECIFIED AT RE1A |
| | REFUSED |
| | DON'T KNOW |

RL3**rl1hisplatno (Sensitive)**

R1 RL3 CNSDR YRSF HSPAN OR LATNO

QUESTION TEXT:

{Do you/Does SP} consider {yourself/himself/herself} Hispanic or Latino?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | |
| 2 | NO | RL5 |
| | REFUSED | RL5 |
| | DON'T KNOW | RL5 |
-

RL4**rl1mexpurcu1 (Sensitive)**

R1 RL4 HISP ETHNCTY MEXICAN AMER

rl1mexpurcu2 (Sensitive)

R1 RL4 HISP ETHNCTY PUERO RICAN

rl1mexpurcu3 (Sensitive)

R1 RL4 HISP ETHNCTY CUBAN AMER

rl1mexpurcu4 (Sensitive)

R1 RL4 HISP ETHNCTY OTHR SPECIFY

rl1mexpurcu5 (Sensitive)

R1 RL4 HISP ETHNCTY DOMINICAN (from RL4A)

rl1mexpurcu6 (Sensitive)

R1 RL4 HISP ETHNCTY CENTRAL AMER (from RL4A)

rl1mexpurcu7 (Sensitive)	R1 RL4 HISP ETHNCTY SOUTH AMER (from RL4A)
rl1mexpurcu8 (Sensitive)	R1 RL4 HISP ETHNCTY SPANISH (from RL4A)

QUESTION TEXT:

SHOW CARD RL2

Would {you/SP} say {you are/{he/she} is} Mexican American, Puerto Rican, Cuban American, or something else?

SELECT ALL THAT APPLY

CODES **Code All That Apply**

1	MEXICAN AMERICAN/CHICANO	RL5
2	PUERTO RICAN	RL5
3	CUBAN AMERICAN	RL5
4	OTHER (SPECIFY)	RL5
	REFUSED	RL5
	DON'T KNOW	RL5

PROGRAMMER INSTRUCTIONS:

Allow select all that apply.

RL4A

RL4A

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER HISPANIC OR LATINO GROUP

ENTER TEXT

Length 75

RL5

rl1condspanh

R1 RL5 INTRVIW CONDCTD IN SPANSH

QUESTION TEXT:

IS THIS INTERVIEW BEING CONDUCTED IN SPANISH?

CODES

1	YES	RL7
2	NO	

RL6

rl1spkothlan

R1 RL6 SPEAK LANG OTH THN ENGLSH

QUESTION TEXT:

{Do you/Does SP} speak a language other than English?

CODES

1	YES	
2	NO	SECTION VA
	REFUSED	SECTION VA
	DON'T KNOW	SECTION VA

RL7**rl1unspokeng**

R1 RL7 HOW UNDRSTND SPOKEN ENGL

QUESTION TEXT:

How well would you say {you understand/SP understands} English when someone is speaking to {you/him/her}? Would you say very well, well, not well, or not at all?

CODES

- 1 VERY WELL
 - 2 WELL
 - 3 NOT WELL
 - 4 NOT AT ALL
 - REFUSED
 - DON'T KNOW
-

RL8**rl1spkengwel**

R1 RL8 HOW WELL SPEAK ENGLISH

QUESTION TEXT:

How well would you say {you speak/SP speaks} English? Would you say very well, well, not well, or not at all?

CODES

- 1 VERY WELL
- 2 WELL
- 3 NOT WELL
- 4 NOT AT ALL
- REFUSED
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section VA – Veteran's Status.

Derived Variables from Items in RL Section

rl1dracehisp	R1 D RACE AND HISPANIC ETHNICITY
---------------------	----------------------------------

NHATS Round 1

Section VA [VETERAN'S STATUS]

Sequence: 35

VA1 **va1serarmfor** R1 VA1 SERVED IN ARMED FORCES

QUESTION TEXT:

Did {you/SP} ever serve on active duty in the Armed Forces of the United States?

CODES

1	YES	
2	NO	VA3
	REFUSED	SECTION WB
	DON'T KNOW	SECTION WB

VA2 **va1whnservva1 (Sensitive)** R1 VA2 WHEN SERVD BEFRE NOV 1941
 va1whnservva2 (Sensitive) R1 VA2 WHN SERVD WWII
 va1whnservva3 (Sensitive) R1 VA2 WHN SERVD 1947 TO 1950
 va1whnservva4 (Sensitive) R1 VA2 WHN SERVD KOREAN WAR
 va1whnservva5 (Sensitive) R1 VA2 WHN SERVD 1955 TO 1964
 va1whnservva6 (Sensitive) R1 VA2 WHN SERVD VIETNAM ERA
 va1whnservva7 (Sensitive) R1 VA2 WHN SERVD 1975 TO 1990
 va1whnservva8 (Sensitive) R1 VA2 WHN SERVD 1990 TO 2001
 va1whnservva9 (Sensitive) R1 VA2 WHN SERVD 2001 OR LATER

QUESTION TEXT:

SHOWCARD VA1

When did {you/SP} serve on active duty in the U.S. Armed Forces?

SELECT ALL THAT APPLY

SELECT EACH PERIOD SP SERVED, EVEN IF IT WAS ONLY FOR PART OF THE PERIOD

CODES **Code All That Apply**

1	NOVEMBER 1941 OR EARLIER
2	WORLD WAR II (DECEMBER 1941-DECEMBER 1946)
3	JANUARY 1947 – JUNE 1950
4	KOREAN WAR (JULY 1950 – JANUARY 1955)
5	FEBRUARY 1955 – JULY 1964
6	VIETNAM ERA (AUGUST 1964 – APRIL 1975)
7	MAY 1975 – JULY 1990
8	AUGUST 1990 – AUGUST 2001 (INCLUDING PERSIAN GULF WAR)
9	SEPTEMBER 2001 OR LATER
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

VA3

va1memnatgrd

R1 VA3 MEMBER OF NATIONAL GUARD

QUESTION TEXT:

{Were you/Was SP} ever an active member of a National Guard or military reserve unit?

CODES

1 YES

2 NO

REFUSED

DON'T KNOW

SECTION WB

SECTION WB

SECTION WB

NHATS Round 1

Section WB [WELL-BEING]

Sequence: 36

BOX WB1PRE

BOXWB1PRE

NOT ON FILE

If PROXY flag=1(YES), go to Section IP – Insurance Plans.

Otherwise, continue.

WB1PRE

WB1PRE

NOT ON FILE

QUESTION TEXT

The next few questions focus on your feelings over the last month.

PRESS 1 AND ENTER TO CONTINUE

WB1

wb1offelche1

R1 WB1 OFTEN YOU FEEL CHEERFUL

wb1offelche2

R1 WB1 OFTEN YOU FEEL BORED

wb1offelche3

R1 WB1 OFTEN YOU FEEL FULLOFLIFE

wb1offelche4

R1 WB1 OFTEN YOU FEEL UPSET

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display

If at WB1a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

SHOW CARD WB1

{[{}During the last month, how often did you feel{[]}]}

{variable text [a-d]}

RESPONSE [1] a. cheerful?

RESPONSE [2] b. bored?

RESPONSE [3] c. full of life?

RESPONSE [4] d. upset?

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

CODES

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

PROGRAMMER INSTRUCTIONS:

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

WB2	wb1truestme1	R1 WB2 SP LIFE HAS MEANING PURPS
	wb1truestme2	R1 WB2 SP FEELS CONFIDENT
	wb1truestme3	R1 WB2 SP GAVE UP IMPROVING LIFE
	wb1truestme4	R1 WB2 SP LIKES LIVING SITUATION

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at WB2a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}Next, tell me whether you agree a lot, a little, or not at all with the following statements about your life.{[]}

{variable text [a-d]}

RESPONSE [1] a. My life has meaning and purpose.

RESPONSE [2] b. I feel confident and good about myself.

RESPONSE [3] c. I gave up trying to improve my life a long time ago.

RESPONSE [4] d. I like my living situation very much.

CODES

- | | |
|---|------------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

WB3	wb1ageyofeel	R1 WB3 AGE YOU FEEL MOST OF TIME
------------	---------------------	----------------------------------

QUESTION TEXT:

Sometimes people feel older or younger than their age. During the last month, what age did you feel most of the time?

ENTER AGE

ENTER NUMBER

- | | |
|------------|-----------|
| Range | 18 to 110 |
| REFUSED | |
| DON'T KNOW | |

WB4	wb1agrwstmt1	R1 WB4 SP SELF DETERMINATION
------------	---------------------	------------------------------

wb1agrwstmt2	R1 WB4 SP WANTS-FINDS WAY TO DO
wb1agrwstmt3	R1 WB4 SP ADJUSTS TO CHANGE

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display

If at WB4a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{[For these last few statements, please tell me if you agree a lot, a little, or not at all.]}{}

{variable text [a-c]}

RESPONSE [1] a. Other people determine most of what I can and cannot do.

RESPONSE [2] b. When I really want to do something, I usually find a way to do it.

RESPONSE [3] c. I have an easy time adjusting to change.

CODES

- | | |
|---|------------------|
| 1 | AGREE A LOT |
| 2 | AGREE A LITTLE |
| 3 | AGREE NOT AT ALL |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

Go to Section IP – Insurance Plans.

NHATS Round 1

Section IP [INSURANCE PLANS]

Sequence: 37

IP1PRE

IP1PRE

NOT ON FILE

QUESTION TEXT

Now we have a few questions about {your/SP's} health insurance.

PRESS 1 AND ENTER TO CONTINUE

IP1

ip1covmedcad

R1 IP1 COVERD BY MEDICARE PART D

QUESTION TEXT:

{Are you/Is SP} (currently) covered by or enrolled in a Medicare Prescription Drug plan, also called Part D?

CODES

- | | | |
|---|------------|-----|
| 1 | YES | IP3 |
| 2 | NO | |
| | REFUSED | |
| | DON'T KNOW | |
-

IP2

ip1otdrugcov

R1 IP2 DRUG COVERG SOME OTHR WAY

QUESTION TEXT:

{Do you/Does SP} have prescription drug coverage through a current or former employer or some other way?

CODES

- | | | |
|---|-----------|--|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'TKNOW | |
-

IP3

ip1mgapmedsp

R1 IP3 MEDIGAP OR MEDICARE SUPP

QUESTION TEXT:

Some people have additional coverage besides Medicare to pay for doctors and other medical care. This is sometimes referred to as Medigap or a Medicare Supplement. {Do you/Does SP} have this type of health insurance coverage?

CODES

- | | | |
|---|-----------|--|
| 1 | YES | |
| 2 | NO | |
| | REFUSED | |
| | DON'TKNOW | |
-

DISPLAY INSTRUCTIONS:

Display “, also known as {STATE NAME FOR MEDICAID PROGRAM},” and “{STATE NAME FOR MEDICAID PROGRAM}” if state name for Medicaid is not “Medicaid”.

Otherwise display “Medicaid”

QUESTION TEXT:

Medicaid {, also known as {STATE NAME FOR MEDICAID PROGRAM},} is a state program for low-income people or for people on public assistance. Sometimes people with very large medical bills are also covered by Medicaid.

{Are you/Is SP} now covered by {Medicaid/{STATE NAME FOR MEDICAID PROGRAM}}?

CODES

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

PROGRAMMER INSTRUCTIONS:

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.

QUESTION TEXT:

TRICARE is a health care program for active duty and retired members of the uniformed Armed Forces, their families, and survivors.

{Are you/Is SP} now covered by TRICARE?

CODES

- | | |
|---|-----------|
| 1 | YES |
| 2 | NO |
| | REFUSED |
| | DON'TKNOW |

QUESTION TEXT:

Not including government programs, {do you/does SP} have any insurance that would pay for a year or more of care in a nursing home, assisted living, or in {your/his/her} home?

CODES

- | | | |
|---|-----------|------------|
| 1 | YES | |
| 2 | NO | SECTION LF |
| | REFUSED | SECTION LF |
| | DON'TKNOW | SECTION LF |

IP7	ip1typcar01	R1 IP7 LTC INS NURSNG HOME COVD
	ip1typcar02	R1 IP7 LTC INS ASSISTD LVNG COVD
	ip1typcar03	R1 IP7 LTC INS HOME HEALTH COVD

QUESTION TEXT:

Which types of care are covered by {your/SP's} policy? Care in: a nursing home, assisted living, or care in {your/his/her} home?

SELECT ALL THAT APPLY

CODES	Code All That Apply
1	NURSING HOME CARE
2	ASSISTED LIVING
3	CARE BY HOME HEALTH PROVIDERS IN HOME
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

IP8	ip1paypremms	R1 IP8 HOW MUCH PAY IN PREMIUMS
------------	---------------------	---------------------------------

QUESTION TEXT:

SHOW CARD IP1

For the year ending December {CURRENT YEAR-1}, how much altogether did {you/SP} pay in premiums?
Would you say

CODES	
1	Less than \$1,000,
2	\$1,000 to less than \$2,000,
3	\$2,000 to less than \$3,000,
4	\$3,000 to less than \$5,000, or
5	\$5,000 or more?
	REFUSED
	DON'T KNOW

IP9	ip1longhadpl	R1 IP9 HOW LONG HAD THIS POLICY
------------	---------------------	---------------------------------

QUESTION TEXT:

How long {have you/has SP} had this policy?

INDICATE RESPONSE UNIT

CODES		
1	NUMBERS OF YEARS	IP9A
2	AGE	IP9B
	REFUSED	SECTION LF
	DON'T KNOW	SECTION LF

IP9A

ip1numyears

R1 IP9A NUMBER OF YEARS

QUESTION TEXT:

ENTER NUMBER OF YEARS SP HAS HAD POLICY

ENTER ZERO IF LESS THAN 1 YEAR

ENTER NUMBER

Range

0 to 40

PROGRAMMER INSTRUCTIONS:

Range 0-40

Go to Section LF – Labor Force

IP9B

ip1agepurpol

R1 IP9B AGE WHEN PURCHSD POLICY

QUESTION TEXT:

ENTER AGE OF SP WHEN PURCHASED POLICY

ENTER NUMBER

Range

30 to 110

Soft Range

40 to 90

PROGRAMMER INSTRUCTIONS:

Hard range 30-110

Soft range 40-90

Go to Section LF – Labor Force

NHATS Round 1

Section LF [LABOR FORCE]

Sequence: 38

LF1PRE

LF1PRE

NOT ON FILE

QUESTION TEXT

We have some questions about {you/SP} and {your/his/her} family to help us understand how well people are managing financially these days.

PRESS 1 AND ENTER TO CONTINUE

BOX LF1

BOXLF1

NOT ON FILE

If FACILITY flag=1 (YES) and PA17 NE 1 (WORKED IN LAST MONTH), go to LF11.

Otherwise, go to LF1.

LF1

If1workfpay

R1 LF1 WORKED FOR PAY RECENTLY

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

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

CODES

1	YES	LF4
2	NO	
3	RETIRED/DON'T WORK ANYMORE	LF11
	REFUSED	
	DON'T KNOW	

LF2

If1abstlstwk

R1 LF2 ABSENT FRM JOB LAST WEEK

QUESTION TEXT:

{Do you/Does SP} have a job from which {you were/{he/she} was} absent last week because of illness, vacation, or some other reason?

CODES

1	YES	LF4
2	NO	
3	RETIRED/DON'T WORK ANYMORE	LF11
	REFUSED	LF11

LF3**If1wrkplstmn**

R1 LF3 WORK FOR PAY IN LST MONTH

QUESTION TEXT:

Now think about last month, that is {MONTH BEFORE INTERVIEW MONTH}. Did {you/SP} do any work for pay at any time in the last month?

CODES

1	YES	LF8
2	NO	LF11
	REFUSED	LF11
	DON'T KNOW	LF11

LF4**If1mrthnonjb**

R1 LF4 MOR THN ONE JOB LAST WEEK

QUESTION TEXT:

Last week, did {you/SP} have more than one job, including part-time, evening, or weekend work?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

LF5**If1hrswkwork**

R1 LF5 HRS PR WEEK WORK MAIN JOB

DISPLAY INSTRUCTIONS:

If LF4=1 (YES), display “main job” and “By main job, I mean the job at which {you work/{he/she} works} the most hours.”

Otherwise, display “job”.

QUESTION TEXT:

How many hours per week {do you/does SP} usually work at {your/his/her} {job/main job}? {By main job, I mean the job at which {you work/{he/she} works} the most hours.}

ENTER NUMBER OF HOURS USUALLY WORK

IF NUMBER OF HOURS VARY EACH WEEK, ENTER 97

ENTER NUMBER

Range	1 to 70
REFUSED	LF8
DON'TKNOW	LF8

BOX LF6**BOXLF6**

NOT ON FILE

If LF2=1 (YES, ABSENT LAST WEEK), go to LF7.
Otherwise go to LF6.

LF6**If1hrwrkltwk**

R1 LF6 HOURS WORK LAST WEEK

QUESTION TEXT:

How many hours did {you/SP} work last week?

ENTER NUMBER OF HOURS

ENTER NUMBER

Range	1 to 70
REFUSED	LF8
DON'T KNOW	LF8

PROGRAMMER INSTRUCTIONS:

ALL RESPONSES SKIP TO LF8

LF7**If1hrwrklstw**

R1 LF7 HOW MNY HOURS DID YOU WRK

QUESTION TEXT:

You said {you were/SP was} absent from work last week. How many hours did {you/he/she} work the last week {you were/{he/she} was} at work?

ENTER NUMBER OF HOURS

ENTER NUMBER

Range	1 to 70
REFUSED	
DON'T KNOW	

LF8**If1oftpaid**

R1 LF8 HOW OFTN PAID ON MAIN JOB

DISPLAY INSTRUCTIONS:

If LF4=1 (YES), display “In {your/SP's} main job, {are you/is {he/she}}”

Otherwise, display “Are you/Is SP”.

QUESTION TEXT:

{Are you/Is SP} /In {your/SP's} main job, {are you/is {he/she}} paid every week, every two weeks, two times a month, or on some other schedule?

CODES

1	EVERY WEEK	LF9
2	EVERY TWO WEEKS	LF9
3	TWO TIMES A MONTH	LF9
4	OTHER SCHEDULE (SPECIFY)	
	REFUSED	LF9
	DON'T KNOW	LF9

LF8A**LF8A**

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PAYMENT SCHEDULE

ENTER TEXTLength 25

LF9**If1lstpaychk**

R1 LF9 HOW MUCH LAST PAYCHECK

DISPLAY INSTRUCTIONS:

If LF4=1(YES), display "for {your/his/her} main job"

QUESTION TEXT:

How much was {your/SP's} last paycheck before taxes and any other deductions {for {your/his/her} main job}?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: If it is easier, you can just tell me how much {you earn/SP earns} per hour or per day.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER PAYCHECK AMOUNT
2	ENTER PAY PER HOUR
3	ENTER PAY PER DAY
	REFUSED
	DON'T KNOW

LF9A**If1pychkmnt**

R1 LF9A PAYCHECK AMOUNT

QUESTION TEXT:

ENTER PAYCHECK AMOUNT [LF10]

\$ _____

ENTER NUMBER

Range 1 to 999999

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999,999) so that dollar sign is displayed and commas are inserted appropriately.

LF9B**If1perhrpay**

R1 LF9B PAY PER HOUR

QUESTION TEXT:

ENTER PAY PER HOUR [LF10]

\$ _____

ENTER NUMBER

Range

1 to 999.99

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999.99) so that dollar sign is displayed and decimal point is inserted appropriately.

LF9C**lf1perdaypay**

R1 LF9C PAY PER DAY

QUESTION TEXT:

ENTER PAY PER DAY

\$ _____

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$9,999) so that dollar sign is displayed and comma is inserted appropriately.

LF10**lf1ernfrmwrk**

R1 LF10 AMT EARN FRM WRK LST MTH

QUESTION TEXT:

Now thinking about the month of {CURRENT MONTH -1 MONTH}, how much did {you/SP} earn altogether from any work {you/he/she} did in {CURRENT MONTH -1 MONTH}, before taxes and before any other deductions?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

\$ _____

ENTER NUMBER

Range

1 to 999999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999,999) so that dollar sign is displayed and commas are inserted appropriately.

LF11**lf1occupaton**

R1 LF11 OCCUPATION MOST OF LIFE

QUESTION TEXT:

We are interested in the work people did most of their lives. What kind of work was that? (In other

words, what was {your/SP's} occupation?)

CODES

1	ENTER OCCUPATION	
2	NEVER WORKED ENTIRE LIFE	BOX LF13
3	HOMEMAKER/RAISED CHILDREN/WORKED IN THE HOME	BOX LF13
	REFUSED	BOX LF13
	DON'T KNOW	BOX LF13

LF11A

If1doccpctgy

R1 D LONGEST OCCUPATION CATEGORY

QUESTION TEXT:

ENTER OCCUPATION DESCRIPTION

ENTER TEXT

Length 75

BOX LF12

BOXLF12

NOT ON FILE

If LF1 or LF2 or LF3 = 1 (YES), go to LF12.
Otherwise, go to BOX LF13.

LF12

If1diffwrknew

R1 LF12 DO THS WRK SOMETHNG DIFF

QUESTION TEXT:

{Are you/Is SP} doing this kind of work now or {are you/is {he/she}} doing something different?

CODES

1	SAME KIND OF WORK
2	SOMETHING DIFFERENT
	REFUSED
	DON'T KNOW

BOX LF13

BOXLF13

NOT ON FILE

If [HH1= 1 (MARRIED) or 2 (LIVING WITH A PARTNER)] and [(HH11=1 (LIVES WITH SP) AND (FACILITY FLAG NE 1)) or HH12=1 (PRIVATE RESIDENCE)], go to LF13.

Otherwise, go to Section HP – Home Ownership.

LF13

If1huswifwrk

R1 LF13 HUSB WIFE PARTN PAY WORK

DISPLAY INSTRUCTIONS:

If PROXY flag = 1 (YES) and PROXY RELATIONSHIP = 2(SPOUSE/PARTNER),
display "you".
Else if PROXY flag=1 (YES) display "SP's".

Otherwise display "your".

If PROXY RELATIONSHIP NE 2 and HH1=2 (LIVING WITH A PARTNER), display "partner"

Else if PROXY RELATIONSHIP NE 2 and HH5=1 (MALE), display "husband"

Else if PROXY RELATIONSHIP NE 2 and HH5=2 (FEMALE), display "wife"

QUESTION TEXT:

Did {you/your/SP's}{husband/wife/partner} do any work for pay in the month of {CURRENT MONTH-1 MONTH}?

CODES

1	YES	
2	NO	SECTION HP
	REFUSED	SECTION HP
	DON'T KNOW	SECTION HP

LF14

lf1huwpaearn

R1 LF14 HUS WIFE PAR PAY LAT MTH

DISPLAY INSTRUCTIONS:

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

Else if PROXY flag =1 (YES), display "SP's".

Otherwise display "your".

If PROXY RELATIONSHIP NE 2 and HH1=2 (LIVING WITH A PARTNER), display "partner"

Else if PROXY RELATIONSHIP NE 2 and HH5=1 (MALE), display "husband"

Else if PROXY RELATIONSHIP NE 2 and HH5=2 (FEMALE), display "wife"

QUESTION TEXT:

In {CURRENT MONTH -1 MONTH}, how much altogether did {you/your/SP's}{husband/wife/partner} earn before taxes and before any other deductions?

IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

\$ _____

ENTER NUMBER

Range	1 to 999999
REFUSED	SECTION HP
DON'T KNOW	SECTION HP

PROGRAMMER INSTRUCTIONS:

Use input mask in response field (\$999,999) so that dollar sign is displayed and commas are inserted appropriately.

Go to Section HP – Home Ownership

Derived Variables from Items in LF Section

If1doccpctgy	R1 D LONGEST OCCUPATION CATEGORY
--------------	----------------------------------

NHATS Round 1

Section HP [HOME OWNERSHIP]

Sequence: 39

BOX HP1

BOXHP1

NOT ON FILE

If FACILITY flag = 1 (yes), go to Section IA – Income and Assets.
Otherwise, go to HP1.

HP1

hp1ownrentot

R1 HP1 OWN RENT OR OTHER

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} own
the home (apartment/condo) at {SP's {ADDRESS 1, ADDRESS 2} from PERSON ROSTER}, rent it, or is
there some other arrangement?

CODES

1	OWN	
2	RENT	HP6
3	SOME OTHER ARRANGEMENT	HP5
	REFUSED	HP5
	DON'T KNOW	HP5

HP2

hp1mrtpadoff

R1 HP2 MORTGAGE PAID OFF

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1= 1 (MARRIED) OR 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Is {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} mortgage paid
off or are monthly mortgage payments still being made?

IF NEEDED: Include any payments on a home equity loan or second mortgage.

CODES

1	PAID OFF	HP4
2	STILL MAKE PAYMENTS	
3	REVERSE MORTGAGE	HP4
	REFUSED	HP4
	DON'T KNOW	HP4

HP3**hp1mthlymort**

R1 HP3 MORTGAGE PAYMNT EACH MNTH

QUESTION TEXT:

How much (altogether) is that each month?

ENTER DOLLAR AMOUNT [HP3B]

ENTER NUMBER

Range	1 to 9999
Soft Range	100 to 5000
REFUSED	HP3b
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999

Soft Range: 100-5000

Use input mask in response field (\$9,999) so that dollar sign is displayed and commas are inserted appropriately.

HP3A**hp1mortpaymt**

R1 HP3A MORTGAGE PAYMENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Is it.....

CODES

1	less than \$250,
2	\$250 -\$499,
3	\$500-\$999, or
4	\$1,000 or more?
	REFUSED
	DON'T KNOW

HP3B**hp1whnpayoff**

R1 HP3B WHEN EXPCT PAY OFF MORTG

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "Do you". Otherwise, display "Does SP".

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} expect to pay off the mortgage(s) within 5 years, 10 years, or longer?

CODES

- | | |
|---|----------------------|
| 1 | 5 YEARS |
| 2 | 10 YEARS |
| 3 | LONGER THAN 10 YEARS |
| | REFUSED |
| | DON'T KNOW |

HP3C**hp1amtstlowe**

R1 HP3C HOW MUCH STILL OWE

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you". Otherwise, display "does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

About how much {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} still owe on the mortgage(s)?

IF NEEDED: The nearest \$10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT [HP4]

ENTER NUMBER

- | | |
|------------|---------------|
| Range | 1 to 9999999 |
| Soft Range | 500 to 900000 |
| REFUSED | HP4 |
| DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999999
Soft Range: 500-900000

Use input mask in response field (\$9,999,999) so that dollar sign is displayed and commas are inserted appropriately.

HP3D**hp1amoutowed**

R1 HP3D THE AMOUNT OWED IS

QUESTION TEXT:

SHOW CARD HP2

Is the amount owed...

CODES

- | | |
|---|------------------------------------|
| 1 | less than \$50,000, |
| 2 | between \$50,000 and \$100,000, or |
| 3 | over \$100,000 |
| | REFUSED |
| | DON'T KNOW |
-

HP4**hp1homevalue**

R1 HP4 PRESENT VALUE OF HOME

QUESTION TEXT:

What is the present value of this home? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?

IF NEEDED: Your best guess or the nearest \$10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT

[SECTION IA]

ENTER NUMBER

- | | |
|------------|---------------|
| Range | 1 to 9999999 |
| Soft Range | 500 to 900000 |
| REFUSED | SECTION IA |
| DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999999
Soft Range: 500-900000

Use input mask in response field (\$9,999,999) so that dollar sign is displayed and commas are inserted appropriately.

HP4A**hp1homvalamt**

R1 HP4A HOME VALUE AMOUNT

QUESTION TEXT:

SHOW CARD HP3

Would it be...

CODES

1	less than \$50,000,	SECTION IA
2	\$50,000-\$74,999,	SECTION IA
3	\$75,000-\$99,999,	SECTION IA
4	\$100,000-\$199,999,	SECTION IA
5	\$200,000-\$299,999,	SECTION IA
6	\$300,000-\$499,999,	SECTION IA
7	\$500,000-\$749,999, or \$750,000 or more?	SECTION IA
	REFUSED	SECTION IA
	DON'T KNOW	SECTION IA

HP5**hp1payment**

R1 HP5 DO YOU PAY RENT

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display “Do you”. Otherwise, display “Does SP”.

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}”.

If PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display “SP FIRSTNAME LASTNAME”. Otherwise, display “SPOUSE/PARTNER FIRSTNAME LASTNAME”.

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} pay rent to live here?

CODES

1	YES	
2	NO	SECTION IA
	REFUSED	SECTION IA
	DON'T KNOW	SECTION IA

HP6**hp1rentamt**

R1 HP6 RENT PAID EACH MONTH

QUESTION TEXT:

How much is that each month?

ENTER DOLLAR AMOUNT

[BOX HP7]

ENTER NUMBER

Range	1 to 9999
Soft Range	1 to 3000
REFUSED	HP7
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Hard Range: 1-9999

Soft Range: 1-3000

Use input mask in response field (\$9,999) so that dollar sign is displayed and commas are inserted appropriately.

HP6A**hp1rentamout**

R1 HP6A RENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Is it...

CODES

- | | |
|---|------------------|
| 1 | less than \$250, |
| 2 | \$250 -\$499, |
| 3 | \$500-\$999, or |
| 4 | \$1,000 or more? |
| | REFUSED |
| | DON'T KNOW |
-

BOX HP7**BOXHP7**

NOT ON FILE

If HP6>=\$500 or HP6a=3 (\$500-999) or 4 (\$1,000 or more), go to Section IA – Income and Assets.
Otherwise, go to HP7.

HP7**hp1sec8pubsn**

R1 HP7 HME SEC 8 PUBL/SENR HOUS

QUESTION TEXT:

Is this home in Section 8 or public housing or housing for low-income seniors?

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section IA – Income and Assets

NHATS Round 1

Section IA [INCOME AND ASSETS]

Sequence: 40

IA1PRE

IA1PRE

NOT ON FILE

We are interested in how people are getting along financially these days. The next few questions are about income and other resources. Your responses can help us understand how people manage financially as they age.

Please feel free to refer to any records or other persons that may be of assistance in answering these questions.

Many of these questions ask about "last month." By last month, I mean in {CURRENT MONTH - 1}.

PRESS 1 AND ENTER TO CONTINUE

IA1

ia1recsspa1

R1 IA1 SP REC SOCIAL SECURITY

ia1recsspa2

R1 IA1 SPOUSE PART REC SOC SEC

ia1recsspa3

R1 IA1 NO SOC SECURITY PAYMNT REC

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you". Otherwise, display "SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE". Display "in the last month" in bold underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Social Security retirement and/or Railroad Retirement payments in the last month (that is in {CURRENT MONTH - 1})?

IF NEEDED: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes.

{SELECT ALL THAT APPLY}

CODES

Code All That Apply

- | | | |
|---|--|-----|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE | |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE | |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE | IA4 |
| | REFUSED | IA4 |
| | DON'T KNOW | IA4 |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message
“INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

BOX IA2**BOXIA2**

NOT ON FILE

If IA1 NE 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

IA2**ia1howrecssp**

R1 IA2 HOW REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "Do you".
Otherwise, display "Does SP".

QUESTION TEXT:

{Do you/Does SP} get Social Security checks through the mail, or use direct deposit to a bank account?

CODES

- | | |
|---|----------------|
| 1 | MAIL |
| 2 | DIRECT DEPOSIT |
| | REFUSED |
| | DON'T KNOW |
-

IA3A**ia1msrtrecss (Sensitive)**

R1 IA3A MTH STRD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “MONTH” in underlined text”.

QUESTION TEXT:

What month and year did {you/SP} start receiving Social Security?

ENTER MONTH

ENTER NUMBER

- Range
REFUSED
DON'T KNOW

1 to 12

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

IA3B**ia1yrstressp (Sensitive)**

R1 IA3B YR STRTD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “YEAR” in underlined text”.

QUESTION TEXT:

[What month and year did {you/SP} start receiving Social Security?]

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: {CURRENT YEAR - 45} – {CURRENT YEAR}.
Do not display the phrase 'Enter Number'.

IA4

ia1recssils1
ia1recssils2
ia1recssils3

R1 IA4 SP RECEIVD SSI LAST MONTH
R1 IA4 SPOUSE PRT REC SSI LST MO
R1 IA4 NO SSI RECEIVD LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP}{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Supplemental Security Income, which is also called SSI, last month?

IF NEEDED: These are monthly government payments to lower-income people in need.

{SELECT ALL THAT APPLY}

CODES**Code All That Apply**

- 1 YES, SP RECEIVED PAYMENT FROM SOURCE
- 2 YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
- 3 NO PAYMENT RECEIVED FROM THIS SOURCE
- REFUSED
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA5

ia1rvapayls1
ia1rvapayls2

R1 IA5 SP REC PAY FRM VA LAST MO
R1 IA5 SPOUS PA REC VA PAY LSTMO

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
 Otherwise, display "SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
 If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
 Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP}{or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive any payments from the Veteran's Administration (U.S. Department of Veterans Affairs) last month related to military service or veteran survivor's benefits?

{SELECT ALL THAT APPLY}

CODES Code All That Apply

- 1 YES, SP RECEIVED PAYMENT FROM SOURCE
- 2 YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
- 3 NO PAYMENT RECEIVED FROM THIS SOURCE
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA6PRE**IA6PRE**

NOT ON FILE

People sometimes have other retirement income. This may be from pensions or retirement plans related to their jobs.

PRESS 1 AND ENTER TO CONTINUE

IA6**ia1penjobou1**

R1 IA6 SP HAS PENSION PLAN

ia1penjobou2

R1 IA6 SPOUSE HAS PENSION PLAN

ia1penjobou3

R1 IA6 NO PENSION PLAN

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
 Otherwise, display "Does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any pension plans that were a job-related or union benefit?

IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan.

{SELECT ALL THAT APPLY}

CODES Code All That Apply

- | | |
|---|---|
| 1 | YES, SP RECEIVED PAYMENT FROM SOURCE |
| 2 | YES, SPOUSE/PARTNER RECEIVED PAYMENT
FROM SOURCE |
| 3 | NO PAYMENT RECEIVED FROM THIS SOURCE
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA7

ia1iraothac1

R1 IA7 SP HAS IRA OTH RETIRE ACC

ia1iraothac2

R1 IA7 SPOUSE HAS IRA OTHR ACC

ia1iraothac3

R1 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you". Otherwise, display "Does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH".

QUESTION TEXT:

SHOW CARD IA1

Please look at the types of retirement plans on this card. {Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of these retirement accounts?

IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution.

IF NEEDED: IRAs (Individual Retirement Accounts) and Keoghs are plans you set up on your own.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS 401K, 403B, IRA, OR KEOGH
2	YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH
3	NO ACCOUNTS OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
 If 3 (NO ACCT) selected and [1 (SP ACCT) or 2 (SPOUSE ACCT)] is selected, display error message
 "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving
 the screen.

IA8	ia1mutfdstk1	R1 IA8 SP OWNS MUTUAL FUND STOCK
	ia1mutfdstk2	R1 IA8 SPOUSE OWNS FUNDS STOCK
	ia1mutfdstk3	R1 IA8 SP SPOUSE OWN FUNDS STOCK
	ia1mutfdstk4	R1 IA8 NO FUNDS OR STOCK OWNED

DISPLAY INSTRUCTIONS:

If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "Not including the
 retirement accounts we have already talked about, {do you/does SP}".
 Otherwise, display "Do you/Does SP".

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
 Otherwise, display "Does SP" or "does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME
 LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
 Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option
 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

{Not including the retirement accounts we have already talked about, {do you/does SP}/{Do you/
 Does SP}} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any
 mutual funds or stocks?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
 If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
 message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when

leaving the screen.

IA9	ia1ownbond1	R1 IA9 SP OWNS BONDS
	ia1ownbond2	R1 IA9 SPOUSE OWNS BONDS
	ia1ownbond3	R1 IA9 SP SPOUSE OWN BONDS
	ia1ownbond4	R1 IA9 NO BONDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you". Otherwise, display "does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

Not including what we've already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA10PRE

IA10PRE

NOT ON FILE

The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own.

PRESS 1 AND ENTER TO CONTINUE

IA10	ia1bnkacccd1	R1 IA10 SP OWNS CHECK ACCT
	ia1bnkacccd2	R1 IA10 SPOUSE OWNS CHECK ACCT
	ia1bnkacccd3	R1 IA10 SP SPOUSE OWN CHECK ACCT

ia1bnkacccd4	R1 IA10 NO CHECK ACCT OWNED
ia1bnkacccd5	R1 IA10 SP OWNS SAVINGS ACCT
ia1bnkacccd6	R1 IA10 SPOUSE OWNS SAVING ACCT
ia1bnkacccd7	R1 IA10 SP SPOUSE OWN SAVNG ACT
ia1bnkacccd8	R1 IA10 NO SAVINGS ACCT OWNED
ia1bnkacccd9	R1 IA10 SP OWNS CDS
ia1bnkaccc10	R1 IA10 SPOUSE OWNS CDS
ia1bnkaccc11	R1 IA10 SP SPOUSE OWN CDS
ia1bnkaccc12	R1 IA10 NO CDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you". Otherwise, display "does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

Not counting what we've already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of the following types of accounts?

RESPONSE [1] a. A checking account?

RESPONSE [2] b. A savings account or money market account?

RESPONSE [3] c. Certificates of deposit?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSETS OF THIS TYPE REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA13	ia1realestt1	R1 IA13 SP OWNS REAL ESTATE
	ia1realestt2	R1 IA13 SPOUSE OWNS REAL ESTATE
	ia1realestt3	R1 IA13 SP SPOUSE OWN REAL ESTTE
	ia1realestt4	R1 IA13 NO REAL ESTATE OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

If HP1 = 1 (OWNS HOME), display "besides {SP}'s home".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own
a business, a farm, or any other real estate {besides {SP's} home}, including land or rental properties?

{SELECT ALL THAT APPLY}

CODES Code All That Apply

- | | |
|---|--|
| 1 | YES, SP HAS ASSET |
| 2 | YES, SPOUSE/PARTNER HAS ASSET |
| 3 | YES, SP AND SPOUSE/PARTNER HAVE ASSET
JOINTLY |
| 4 | NO ASSETS OF THIS TYPE
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA14PRE**IA14PRE**

NOT ON FILE

We now have a few questions about income which are important for understanding how
people manage financially as they age.

PRESS 1 AND ENTER TO CONTINUE

BOX IA14**BOXIA14**

NOT ON FILE

If IA1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IA14.
Else if IA1 = 1 (SP RECEIVED SS/RR), go to IA15a.
Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IA16a.
Otherwise, go to BOX IA17.

IA14**iassrrpymnt**

R1 IA14 RECENT MTHLY SS RR PYMNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".

Otherwise, display “SP’s”.

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

First, what was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- 1 ENTER COMBINED AMOUNT
2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA15A
SEPARATELY
REFUSED IA14B
DON'T KNOW IA14B

IA14A

ia1ssrrjtamt

R1 IA14A JOINT SS RR AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA14A = 1-9999, go to BOX IA17

IA14B

ia1ssrrjtest

R1 IA14B ESTMT JOINT SSRR AMOUNT

QUESTION TEXT:

SHOW CARD IA2

Was it...

CODES

- | | | |
|---|---------------------|----------|
| 1 | less than \$1,200, | BOX IA17 |
| 2 | \$1,200-\$1,599, | BOX IA17 |
| 3 | \$1,600-\$1,999, | BOX IA17 |
| 4 | \$2,000-\$2,499, or | BOX IA17 |
| 5 | \$2,500 or more? | BOX IA17 |
| | REFUSED | BOX IA17 |
| | DON'T KNOW | BOX IA17 |

IA15A**ia1ssrrspamt**

R1 IA15A SP SS RR AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "your".
Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA15A = 1-9999, go to BOX IA16a

IA15B**ia1ssrrspest**

R1 IA15B ESTIMATE SP SS RR AMT

QUESTION TEXT:

SHOW CARD IA3
Was it...

CODES

1	less than \$600,
2	\$600-\$899,
3	\$900-\$1,099,
4	\$1,100-\$1,499, or
5	\$1,500 or more? REFUSED DON'T KNOW

BOX IA16A**BOXIA16A**

NOT ON FILE

If IA14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA16a.
Otherwise, go to BOX IA17.

IA16A**ia1ssrrptamt**

R1 IA16A PARTNER SS RR AMT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA16A = 1-9999, go to BOX IA17

IA16B**ia1ssrrptest**

R1 IA16B ESTIMT PARTNR SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Was it...

CODES

1	less than \$600,
2	\$600-\$899,
3	\$900-\$1,099,
4	\$1,100-\$1,499, or
5	\$1,500 or more?
	REFUSED
	DON'T KNOW

BOX IA17**BOXIA17**

NOT ON FILE

If IA4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IA17.
Else if IA4 = 1 (SP RECEIVED SSI), go to IA18a.
Else if IA4 = 2 (SPOUSE RECEIVED SSI), go to IA19a.
Otherwise, go to BOX IA20.

IA17**ia1ssipymnt**

R1 IA17 RECENT MTHLY SSI PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA18A
	REFUSED	IA17B
	DON'T KNOW	IA17B

IA17A**ia1ssijtamt**

R1 IA17A JOINT SSI AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range 1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If IA17A = 1-9999, go to BOX IA20.

IA17B**ia1ssijtest**

R1 IA17B ESTIMATE JOINT SSI AMT

QUESTION TEXT:

SHOW CARD IA4

Was it...

CODES

1	less than \$300,	BOX IA20
2	\$300-\$699,	BOX IA20
3	\$700-\$999, or	BOX IA20
4	\$1000 or more?	BOX IA20
	REFUSED	BOX IA20
	DON'T KNOW	BOX IA20

IA18A

ia1ssispamt

R1 IA18A SP SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "your".
Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP SSI AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA18A = 1-9999, go to BOX IA19A.

IA18B

ia1ssipest

R1 IA8B ESTIMATE SP SSI AMOUNT

QUESTION TEXT:

SHOW CARD IA5

Was it...

CODES

1	less than \$100,
2	\$100-\$199,
3	\$200-\$399,
4	\$400-\$699, or
5	\$700 or more? REFUSED DON'T KNOW

BOX IA19A

BOXIA19A

NOT ON FILE

If IA17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA19a.
Otherwise, go to BOX IA20.

IA19A**ia1ssiptamt**

R1 IA19A PARTNR SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA19A = 1-9999, go to BOX IA20.

IA19B**ia1ssiptest**

R1 IA19B ESTIMATE PARTNR SSI AMT

QUESTION TEXT:

SHOW CARD IA5

Was it...

CODES

1	less than \$100,
2	\$100-\$199,
3	\$200-\$399,
4	\$400-\$699, or
5	\$700 or more?
	REFUSED
	DON'T KNOW

BOX IA20**BOXIA20**

NOT ON FILE

If IA5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IA20.
Else if IA5 = 1 (SP RECEIVED VA), go to IA21a.
Else if IA5 = 2 (SPOUSE RECEIVED VA), go to IA22a.
Otherwise, go to BOX IA23.

IA20

ia1vapymnt

R1 IA20 RECENT MNTHLY VA PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your". Otherwise, display "SP's".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1 ENTER COMBINED AMOUNT
2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA21A
SEPARATELY
REFUSED IA20B
DON'T KNOW IA20B

|A2oA

ia1vajtamt

R1 IA2oA JOINT VA AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If $IA20A = 1-9999$, go to BOX IA23.

|A30B

ia1vajtest

B1 IA20B ESTIMAT JOINT VA AMOUNT

QUESTION TEXT:

SHOW CARD IA6

Was it...

CODES

REFUSED
DON'T KNOW

BOX IA23
BOX IA23

IA21A**ia1vaspamt**

R1 IA21A SP VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "your".
Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP VA AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA21A = 1-9999, go to BOX IA22A.

IA21B**ia1vaspest**

R1 IA21B ESTIMATE SP VA AMOUNT

QUESTION TEXT:

SHOW CARD IA7

Was it...

CODES

1	less than \$500,
2	\$500-\$699,
3	\$700-\$899,
4	\$900-\$1,099, or
5	\$1,100 or more?
	REFUSED
	DON'T KNOW

BOX IA22A**BOXIA22A**

NOT ON FILE

If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22a.
Otherwise, go to BOX IA23.

IA22A**ia1vaptamt**

R1 IA22A PARTNER VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{\$SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

QUESTION TEXT:

What was the amount of {your/{\$SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA22A = 1-9999, go to BOX IA23.

IA22B**ia1vapttest**

R1 IA22B ESTIMATE PARTNR VA AMT

QUESTION TEXT:

SHOW CARD IA7
Was it...

CODES

1	less than \$500,
2	\$500-\$699,
3	\$700-\$899,
4	\$900-\$1,099, or
5	\$1,100 or more? REFUSED DON'T KNOW

BOX IA23**BOXIA23**

NOT ON FILE

If IA6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IA23.
Else if IA6 = 1 (SP RECEIVED PENSION PLAN), go to IA24a.
Else if IA6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IA25a.
Otherwise, go to BOX IA26.

IA23**ia1penpymt**

R1 IA23 RCNT MTH JOBPENSION PYMT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA24A
	REFUSED	IA23B
	DON'T KNOW	IA23B

IA23A**ia1penjtamt**

R1 IA23A JOINT JOB PENSION AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range 1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA23A = 1-9999, go to BOX IA26.

IA23B**ia1penjtest**

R1 IA23B EST JOINT JOB PENSN AMT

QUESTION TEXT:

SHOW CARD IA8

Was it...

CODES

1	less than \$600,	BOX IA26
2	\$600-\$1,099,	BOX IA26
3	\$1,100-\$2,099,	BOX IA26
4	\$2,100-\$4,499, or	BOX IA26

5	\$4,500 or more? REFUSED DON'T KNOW	BOX IA26 BOX IA26 BOX IA26
---	---	----------------------------------

IA24A

ia1penspamt

R1 IA24A SP JOB PENSION AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you have" and "your".
Otherwise, display "SP has" and "SP's".

If IA23=2, (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/SP has} a job-related pension plan." and "this".

QUESTION TEXT:

{You told me earlier that {you have/SP has} a job-related pension plan.} In all, how much was received from {{your/SP's} job-related /this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP PENSION PLAN AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA24A = 1-9999, go to BOX IA25a.

IA24B

ia1penspest

R1 IA24B EST SP JOB PENSION AMT

QUESTION TEXT:

SHOW CARD IA9

Was it...

CODES

- | | |
|---|---|
| 1 | less than \$400, |
| 2 | \$400-\$799, |
| 3 | \$800-\$1,499, |
| 4 | \$1,500-\$3,399, or |
| 5 | \$3,400 or more?
REFUSED
DON'T KNOW |

BOX IA25A

BOXIA25A

NOT ON FILE

If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25a.
Otherwise, go to BOX IA26.

IA25A

ia1pentamt

R1 IA25A PARTNR JOB PNSN AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has" and "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If IA23 = 2 (ENTER SP and SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan" and "this".

QUESTION TEXT:

{You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan.} In all, how much was received from {{your}/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} job-related/this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

IA25B

ia1penptest

R1 IA25B EST PARTNR JOB PEN AMT

QUESTION TEXT:

SHOW CARD IA9

Was it...

CODES

- | | |
|---|---------------------|
| 1 | less than \$400, |
| 2 | \$400-\$799, |
| 3 | \$800-\$1,499, |
| 4 | \$1,500-\$3,399, or |
| 5 | \$3,400 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA26

BOXIA26

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA26.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA27a.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA28a.
Otherwise, go to BOX IA35.

IA26

ia1retworth

R1 IA26 RETIREMENT ACCOUNT WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you". Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display “currently” in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and Keough accounts.

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- 1 ENTER COMBINED AMOUNT
2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA27A
SEPARATELY
REFUSED IA26B
DON'T KNOW IA26B

|A26a

ia1retjtwrt

R1 IA26A JOINT RETIR ACCT WORTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range 1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA26A = 1-9999999, go to BOX IA29.

IA26b**ia1retjtest**

R1 IA26B EST JOINT RET ACCT WRTH

QUESTION TEXT:

SHOW CARD IA10

Is it...

CODES

1	less than \$16,000,	BOX IA29
2	\$16,000-\$49,999,	BOX IA29
3	\$50,000-\$118,999,	BOX IA29
4	\$119,000-\$224,999, or	BOX IA29
5	\$225,000 or more? REFUSED DON'T KNOW	BOX IA29 BOX IA29 BOX IA29

IA27a**ia1retspwrt**

R1 IA27A SP RETIREMENT ACCT WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display “you have”.
Otherwise, display “SP has”.

Display “currently” in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/SP has} retirement accounts.
In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and Keough accounts.

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range	1 to 999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA27A = 1-999999, go to BOX IA28a.

IA27b**ia1retspst**

R1 IA27B EST SP RET ACCT WORTH

QUESTION TEXT:

SHOW CARD IA11

Is it...

CODES

- | | |
|---|------------------------|
| 1 | less than \$10,000, |
| 2 | \$10,000-\$27,999, |
| 3 | \$28,000-\$54,999, |
| 4 | \$55,000-\$143,999, or |
| 5 | \$144,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA28a**BOXIA28a**

NOT ON FILE

If IA26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA28a.
Otherwise, go to BOX IA29.

IA28a**ia1retpwrt**

R1 IA28A PRTNR RET ACCT WORTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{\$SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME}has} retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and Keough accounts.

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

- | | |
|------------|-------------|
| Range | 1 to 999999 |
| REFUSED | |
| DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA28A = 1-999999, go to BOX IA29.

IA28b**ia1retptest**

R1 IA28B EST PARTNR ACCT WORTH

QUESTION TEXT:

SHOW CARD IA11

Is it...

CODES

- | | |
|---|------------------------|
| 1 | less than \$10,000, |
| 2 | \$10,000-\$27,999, |
| 3 | \$28,000-\$54,999, |
| 4 | \$55,000-\$143,999, or |
| 5 | \$144,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA29**BOXIA29**

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA29.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA30a.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA31a.
Otherwise, go to BOX IA35.

IA29**ia1rtlmwdrw**

R1 IA29 RETRMNT WDRW AMT LST MTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "Last month" in bold underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- | | | |
|---|---|-------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS
SEPARATELY | IA30A |
| | REFUSED | IA29B |
| | DON'T KNOW | IA29B |

IA29a**ia1rtlmtwdr**

R1 IA29A JOINT RET WDRW LST MTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA29A = 1-9999, go to BOX IA32.

IA29b**ia1rtlmttest**

R1 IA29B EST JONT RET WDR LS MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA12

For last month, was it...

CODES

1	less than \$200,	BOX IA32
2	\$200-\$299,	BOX IA32
3	\$300-\$699,	BOX IA32
4	\$700-\$1,499, or	BOX IA32
5	\$1,500 or more?	BOX IA32
	REFUSED	BOX IA32
	DON'T KNOW	BOX IA32

IA30a**ia1rtlmspwrdr**

R1 IA30A SP RET WDRWL LAST MONTH

DISPLAY INSTRUCTIONS:If PROXY flag = 2 (no), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "last month" in underlined text.

QUESTION TEXT:Last month, how much altogether did {you/SP} receive or withdraw from {your/his/her} retirement accounts
(for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA30A = 1-9999, go to BOX IA31a.

IA30b**ia1rtlmspest**

R1 IA30B EST SP RET WDR LST MNTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13

For last month, was it...

CODES

- | | |
|---|-------------------|
| 1 | less than \$100, |
| 2 | \$100-\$199, |
| 3 | \$200-\$399, |
| 4 | \$400-\$1,099, or |
| 5 | \$1,100 or more? |
| | REFUSED |
| | DON'T KNOW |
-

BOX IA31a**BOXIA31a**

NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31a.
Otherwise, go to BOX IA32.

IA31a**ia1rtlmptrwdr**

R1 IA31A PARTNR RET WDR LST MTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}" and "{his/her}.

Display "Last month" in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA31A = 1-9999, go to BOX IA32.

IA31b**ia1rtlmpst**

R1 IA31B EST PARTNR WDR LST MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13

For last month, was it...

CODES

- | | |
|---|-------------------|
| 1 | less than \$100, |
| 2 | \$100-\$199, |
| 3 | \$200-\$399, |
| 4 | \$400-\$1,099, or |
| 5 | \$1,100 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA32**BOXIA32**

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA32.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA33a.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA34a.
Otherwise, go to BOX IA35.

IA32**ia1rtyrwdrw**

R1 IA32 RETRMNT WDRWL AMT LST YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- | | | |
|---|---|-------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS
SEPARATELY | IA32A |
| | REFUSED | IA32B |
| | DON'T KNOW | IA32B |

IA32a

ia1rtyrjtamt

R1 IA32A AMT JOINT RET WDR LS YR

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range 1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA32A = 1-9999999, go to BOX IA35.

IA32b

ia1rtyrjtest

R1 IA32B EST JOINT RET WDR LS YR

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA14

For last year, was it...

CODES

- | | | |
|---|----------------------|----------|
| 1 | less than \$2,400, | BOX IA35 |
| 2 | \$2,400-\$3,599, | BOX IA35 |
| 3 | \$3,600-\$8,399, | BOX IA35 |
| 4 | \$8,400-\$17,999, or | BOX IA35 |
| 5 | \$18,000 or more? | BOX IA35 |
| | REFUSED | BOX IA35 |
| | DON'T KNOW | BOX IA35 |
-

IA33a

ia1rtyrspamt

R1 IA33A SP AMT RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range	1 to 9999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA33A = 1-9999999, go to BOX IA34a.

IA33b

ia1rtyrspest

R1 IA33B EST SP RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA15

For last year, was it...

CODES

1	less than \$1,200,
2	\$1,200-\$2,399,
3	\$2,400-\$4,799,
4	\$4,800-\$13,199, or
5	\$13,200 or more?
	REFUSED
	DON'T KNOW

BOX IA34A

BOXIA34A

NOT ON FILE

If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34a.
Otherwise, go to BOX IA35.

IA34a

ia1rtyrptamt

R1 IA34A PARTNR RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}" and "{his/her}".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range
REFUSED
DON'T KNOW

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA34A = 1-9999999, go to BOX IA35.

IA34b

ia1rtyrptest

R1 IA34B EST PRTNR WDR RET LS YR

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA15

For last year, was it...

CODES

- | | |
|---|----------------------|
| 1 | less than \$1,200, |
| 2 | \$1,200-\$2,399, |
| 3 | \$2,400-\$4,799, |
| 4 | \$4,800-\$13,199, or |
| 5 | \$13,200 or more? |

REFUSED
DON'T KNOW

BOX IA35

BOXIA35

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), go to IA35.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS), go to IA36a.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37a.
Otherwise, go to BOX IA38.

IA35

ia1skbdwrth

R1 IA35 NONRETR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} own {mutual funds or stocks}{government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

- | | | |
|---|---|-----------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS
SEPARATELY | IA36A |
| | REFUSED | BOX IA35B |
| | DON'T KNOW | BOX IA35B |
-

IA35a

ia1skbdjtwrt

R1 IA35A JOINT STKS BNDS WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE'S/PARTNER MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999

Do not display the phrase 'Enter Number'.

If IA35A = 1-9999999, go to BOX IA38.

BOX IA35b

BOXIA35b

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8= 3 (JOINT MUTUAL FUNDS), go to IA35b.
Otherwise, go to IA35c.

IA35b

ia1skbdjtest

R1 IA35B EST JOINT STKS BNDS WRT

QUESTION TEXT:

SHOW CARD IA16

Is it...

CODES

1	less than \$62,000,	BOX IA38
2	\$62,000-\$85,999,	BOX IA38
3	\$86,000-\$149,999,	BOX IA38
4	\$150,000-\$434,999, or	BOX IA38
5	\$435,000 or more? REFUSED DON'T KNOW	BOX IA38

IA35c

ia1bndjtest

R1 IA35C EST JOINT ONLY BNDS WRT

QUESTION TEXT:

SHOW CARD IA17

Is it...

CODES

1	less than \$1,000,	BOX IA38
2	\$1,000-\$1,999,	BOX IA38
3	\$2,000-\$19,999,	BOX IA38
4	\$20,000-\$49,999, or	BOX IA38
5	\$50,000- or more? REFUSED DON'T KNOW	BOX IA38

IA36a

ia1skbdspwrt

R1 IA36A SP STKS BONDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you own".
Otherwise, display "SP owns".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you own/SP owns}{mutual funds or stocks}{government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range	1 to 9999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA36A = 1-9999999, go to BOX IA37a.

BOX IA36b

BOXIA36b

NOT ON FILE

If IA8 = 1 (SP MUTUAL FUNDS), go to IA36b.
Otherwise, go to IA36c.

IA36b

ia1skbdsppest

R1 IA36B EST SP STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it...

CODES

1	less than \$77,000,	BOX IA37A
2	\$77,000-\$79,999,	BOX IA37A
3	\$80,000-\$171,999,	BOX IA37A
4	\$172,000-\$199,999, or	BOX IA37A
5	\$200,000- or more?	BOX IA37A
	REFUSED	BOX IA37A
	DON'T KNOW	BOX IA37A

IA36c

ia1bndspes

R1 IA36C EST SP ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Is it...

CODES

- | | |
|---|-----------------------|
| 1 | less than \$1,000, |
| 2 | \$1,000-\$15,999, |
| 3 | \$16,000-\$33,999, |
| 4 | \$34,000-\$55,999, or |
| 5 | \$56,000- or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA37a

BOXIA37a

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37a.
Otherwise, go to BOX IA38.

IA37a

ia1skbdptwrt

R1 IA37A PARTNR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you own".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns".

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between each one.

QUESTION TEXT:

You told me earlier that {you own/{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns} {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

- | | |
|------------|--------------|
| Range | 1 to 9999999 |
| REFUSED | |
| DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.

If IA37A = 1-9999999, go to BOX IA38.

BOX IA37b**BOXIA37b**

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS), go to IA37b.
Otherwise, go to IA37c.

IA37b**ia1skbdptest**

R1 IA37B PART EST STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it...

CODES

1	less than \$77,000,	BOX IA38
2	\$77,000-\$79,999,	BOX IA38
3	\$80,000-\$171,999,	BOX IA38
4	\$172,000-\$199,999, or	BOX IA38
5	\$200,000- or more? REFUSED DON'T KNOW	BOX IA38 BOX IA38 BOX IA38

IA37c**ia1bndptest**

R1 IA37C PART EST ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Is it...

CODES

1	less than \$1,000,
2	\$1,000-\$15,999,
3	\$16,000-\$33,999,
4	\$34,000-\$55,999, or
5	\$56,000- or more? REFUSED DON'T KNOW

BOX IA38**BOXIA38**

NOT ON FILE

If [IA10a = 1 (SP CHECKING) and IA10a = 2 (SPOUSE CHECKING)] or IA10a = 3 (JOINT CHECKING) or
[IA10b = 1 (SP SAVINGS) and IA10b = 2 (SPOUSE SAVINGS)] or IA10b = 3 (JOINT SAVINGS), or
[IA10c = 1 (SP CDS) and IA10c = 2 (SPOUSE CDS)] or IA10c = 3 (JOINT CDS), go to IA38.
Else if IA10a = 1 (SP CHECKING) or IA10b = 1 (SP SAVINGS) or IA10c = 1 (SP CDS), go to IA39a.
Else if IA10a = 2 (SPOUSE CHECKING) or IA10b = 2 (SPOUSE SAVINGS) or IA10c = 2 (SPOUSE CDS), go to IA40a.
Otherwise, go to BOX IA41.

IA38**ia1bkcdwrth**

R1 IA38 BANK ACCT CD WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA10a = 1 (SP CHECKING) or IA10a = 2 (SPOUSE CHECKING) or IA10a = 3 (JOINT CHECKING), display "checking accounts".

If IA10b = 1 (SP SAVINGS) or IA10b = 2 (SPOUSE SAVINGS) or IA10b = 3 (JOINT SAVINGS), display "savings or money market accounts".

If IA10c = 1 (SP CDS) or IA10c = 2 (SPOUSE CDS) or IA10c = 3 (JOINT CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have {checking accounts} {savings or money market accounts} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA39A
	REFUSED	BOX IA38B
	DON'T KNOW	BOX IA38B

IA38a**ia1bkcdjtwrt**

R1 IA38A JOINT BNK ACCT CD WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range 1 to 999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA38A = 1-999,999, go to BOX IA41.

BOX IA38b**BOXIA38b**

NOT ON FILE

If IA10c = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38b.
Otherwise, go to IA38c.

IA38b**ia1bkcdjtest**

R1 IA38B EST JOINT BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA20

Is it...

CODES

1	less than \$11,000,	BOX IA41
2	\$11,000-\$22,999,	BOX IA41
3	\$23,000-\$44,999,	BOX IA41
4	\$45,000-\$112,999, or	BOX IA41
5	\$113,000- or more? REFUSED DON'T KNOW	BOX IA41

IA38c**ia1bnkjtest**

R1 IA38C EST JOINT BNK NO CD WRT

QUESTION TEXT:

SHOW CARD IA21

Is it...

CODES

1	less than \$1,000,	BOX IA41
2	\$1,000-\$5,999,	BOX IA41
3	\$6,000-\$13,999,	BOX IA41
4	\$14,000-\$35,999, or	BOX IA41
5	\$36,000- or more? REFUSED DON'T KNOW	BOX IA41

IA39a**ia1bkcdspwrt**

R1 IA39A SP BNK CDS WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you have".
Otherwise, display "SP has".

If IA10a = 1 (SP CHECKING), display "a checking account".
If IA10b = 1 (SP SAVINGS), display "a savings or money market account".
If IA10c = 1 (SP CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you have/SP has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range	1 to 999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA39A = 1-999,999, go to BOX IA40a.

BOX IA39b**BOXIA39b**

NOT ON FILE

If IA10c = 1 (SP CDs), go to IA39b.
Otherwise, go to IA39c.

IA39b**ia1bkcdspst**

R1 IA39B SP EST BNK ACCT CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Is it...

CODES

1	less than \$10,000,	BOX IA40A
2	\$10,000-\$22,999,	BOX IA40A
3	\$23,000-\$55,999,	BOX IA40A
4	\$56,000-\$80,999, or	BOX IA40A
5	\$81,000 or more?	BOX IA40A
	REFUSED	BOX IA40A
	DON'T KNOW	BOX IA40A

IA39c**ia1bnkspst**

R1 IA39C SP EST BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Is it...

CODES

- | | |
|---|----------------------|
| 1 | less than \$600, |
| 2 | \$600-\$999, |
| 3 | \$1,000-\$2,999, |
| 4 | \$3,000-\$10,999, or |
| 5 | \$11,000 or more? |
| | REFUSED |
| | DON'T KNOW |
-

BOX IA40a**BOXIA40a**

NOT ON FILE

If IA10a = 2 (SPOUSE CHECKING) or IA10b = 2 (SPOUSE SAVINGS) or IA10c = 2 (SPOUSE CDS), go to IA40a.
Otherwise, go to BOX IA41.

IA40a**ia1bkcdptwrt**

R1 IA40A PARTNR BNK ACCT CD WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you have”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME} has”.

If IA10a = 2 (SPOUSE CHECKING), display “a checking account”.
If IA10b = 2 (SPOUSE SAVINGS), display “a savings or money market account”.
If IA10c = 2 (SPOUSE CDS), display “certificates of deposit or CDs”.

If more than one type of account displayed, display “and” between each one.

Display “last month” in underlined text.

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

- | | |
|------------|-------------|
| Range | 1 to 999999 |
| REFUSED | |
| DON'T KNOW | |

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA40A = 1-999999, go to BOX IA41.

BOX IA4ob

BOXIA4ob

NOT ON FILE

If IA1oc = 2 (SPOUSE CDS), go to IA4ob.
Otherwise, go to IA4oc.

IA4ob

ia1bkcdptest

R1 IA4oB EST PARTNR BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Is it...

CODES

1	less than \$10,000,	BOX IA41A
2	\$10,000-\$22,999,	BOX IA41A
3	\$23,000-\$55,999,	BOX IA41A
4	\$56,000-\$80,999, or	BOX IA41A
5	\$81,000 or more? REFUSED DON'T KNOW	BOX IA41A

IA4oc

ia1bnkptest

R1 IA4oC EST PART BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Is it...

CODES

1	less than \$600,
2	\$600-\$999,
3	\$1,000-\$2,999,
4	\$3,000-\$10,999, or
5	\$11,000 or more? REFUSED DON'T KNOW

BOX IA41

BOXIA41

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), or [IA10a = 1 (SP CHECKING) and IA10a = 2 (SPOUSE CHECKING)] or IA10a = 3 (JOINT CHECKING) or [IA10b = 1 (SP SAVINGS) and IA10b = 2 (SPOUSE SAVINGS)] or IA10b = 3 (JOINT SAVINGS), or [IA10c = 1 (SP CDS) and IA10c = 2 (SPOUSE CDS)] or IA10c = 3 (JOINT CDS), go to IA41.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS) or IA10a = 1 (SP CHECKING) or IA10b = 1 (SP SAVINGS) or IA10c = 1 (SP CDS), go to IA42a.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10a = 2 (SPOUSE CHECKING) or IA10b = 2 (SPOUSE SAVINGS) or IA10c = 2 (SPOUSE CDS), go to IA43a.
Otherwise, go to BOX IA44.

IA41**ia1itdvinc**

R1 IA41 AMT INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If [IA10a = 1 (SP CHECKING) or 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING)] or [IA10b = 1 (SP SAVINGS) or 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS)] or [IA10c = 1 (SP CDS) or 2 (SPOUSE CDS) or 3 (JOINT CDS)], display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have altogether from {mutual funds or stocks} {government, corporate, or other bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA42A
	REFUSED	IA41B
	DON'T KNOW	IA41B

IA41a**ia1itdvjamt**

R1 IA41A JOINT INT DIV INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range 1 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999
Do not display the phrase 'Enter Number'.
If IA41A = 1-99999, go to BOX IA44.

IA41b**ia1ltdvjtest**

R1 IA41B EST JNT INTDV INC LS YR

QUESTION TEXT:

SHOW CARD IA24

Was it...

CODES

1	less than \$500,	BOX IA44
2	\$500-\$999,	BOX IA44
3	\$1,000-\$3,999,	BOX IA44
4	\$4,000-\$15,999, or	BOX IA44
5	\$16,000 or more?	BOX IA44
	REFUSED	BOX IA44
	DON'T KNOW	BOX IA44

IA42a**ia1ltdvspanmt**

R1 IA42A SP INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you".
Otherwise, display "SP".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 1 (SP BONDS), display "bonds".
If IA10a = 1 (SP CHECKING) or IA10b = 1 (SP SAVINGS) or IA10c = 1 (SP CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} have altogether from {mutual funds or stocks}{bonds}{bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA42A = 1-9999, go to BOX IA43a.

IA42b**ia1itdvspes**

R1 IA42B EST SP INTDIV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Was it...

CODES

- | | |
|---|---------------------|
| 1 | less than \$200, |
| 2 | \$200-\$999, |
| 3 | \$1,000-\$3,999, |
| 4 | \$4,000-\$6,999, or |
| 5 | \$7,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA43a**BOXIA43a**

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10a = 2 (SPOUSE CHECKING) or IA10b = 2 (SPOUSE SAVINGS) or IA10c = 2 (SPOUSE CDS), go to IA43a.
Otherwise, go to BOX IA44.

IA43a**ia1itdvptamt**

R1 IA43A PART INT DIV INC LS YR

DISPLAY INSTRUCTIONS:

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

If IA8 = 2 (SPOUSE MUTUAL FUNDS,) display “mutual funds or stocks”.
If IA9 = 2 (SPOUSE BONDS), display “bonds”.
If IA10a = 2 (SPOUSE CHECKING) or IA10b = 2 (SPOUSE SAVINGS) or IA10c = 2 (SPOUSE CDS), display “bank accounts or CDs”.

If more than one type of asset displayed, display “and” between each one.

Display “In the last year” in bold underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range
REFUSED

1 to 9999

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA43A = 1-9999, go to BOX IA44.

IA43b

ia1itdvptest

R1 IA43B ESTPRT INT DV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Was it...

CODES

- | | |
|---|---------------------|
| 1 | less than \$200, |
| 2 | \$200-\$999, |
| 3 | \$1,000-\$3,999, |
| 4 | \$4,000-\$6,999, or |
| 5 | \$7,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA44

BOXIA44

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 =3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA44.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA45a.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46a.
Otherwise, go to BOX IA47.

IA44

ia1brewrt

R1 IA44 BUSINESS REALESTATE WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home".

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have a business, a farm, or real estate {other than {SP}'s home}. If that real estate was sold today and then any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA45A
	REFUSED	IA44B
	DON'T KNOW	IA44B

IA44a**ia1brejtwt**

R1 IA44A JOINT BUS REAL WRTH

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range 1 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA44A = 1-99999999, go to BOX IA47.

IA44b**ia1brejtest**

R1 IA44B EST JOINT BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA26

Would it be...

CODES

1	less than \$30,000,	BOX IA47
2	\$30,000-\$151,999,	BOX IA47
3	\$152,000-\$367,999,	BOX IA47
4	\$368,000-\$956,999, or \$957,000 or more?	BOX IA47
5	REFUSED	BOX IA47
	DON'T KNOW	BOX IA47

IA45a**ia1brespwrt**

R1 IA45A SP BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you have".
Otherwise, display "SP has".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

QUESTION TEXT:

You told me earlier that {you have/SP has} a business, a farm, or real estate {other than {SP}'s home}. If that real estate was sold today and then any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA45A = 1-99999999, go to BOX IA46a.

IA45b

ia1brespest

R1 IA45B EST SP BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be...

CODES

- | | |
|---|-------------------------|
| 1 | less than \$30,000, |
| 2 | \$30,000-\$88,999, |
| 3 | \$89,000-\$295,999, |
| 4 | \$296,000-\$360,999, or |
| 5 | \$361,000 or more? |
| | REFUSED |
| | DON'T KNOW |
-

BOX IA46a

BOXIA46a

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46a.
Otherwise, go to BOX IA47.

IA46a

ia1breptwrt

R1 IA46A PART BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a business, a farm, or real estate {other than {SP}'s home}. If that real estate was sold today and then any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA46A = 1-99999999, go to BOX IA47.

IA46b

ia1breptest

R1 IA46B EST PART BUS RE WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be...

CODES

1	less than \$30,000,
2	\$30,000-\$88,999,
3	\$89,000-\$295,999,
4	\$296,000-\$360,999, or
5	\$361,000 or more?
	REFUSED
	DON'T KNOW

BOX IA47

BOXIA47

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA47.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA48a.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49a.
Otherwise, go to IA50.

IA47

ia1breiinc

R1 IA47 BUS REALESTATE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA48A
	REFUSED	IA47B
	DON'T KNOW	IA47B

IA47a**ia1breijtamt**

R1 IA47A JOINT BUS RE INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range	1 to 99999999
-------	---------------

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA47A = 1-99999999, go to BOX IA50.

IA47b**ia1breijtest**

R1 IA47B EST JNT BUS RE INC LSYR

QUESTION TEXT:

SHOW CARD IA28

Was it...

CODES

1	less than \$7,200,	IA50
2	\$7,200-\$16,799,	IA50
3	\$16,800-\$40,799,	IA50
4	\$40,800-\$86,399,	IA50
5	\$86,400 or more?	IA50
	REFUSED	IA50
	DON'T KNOW	IA50

IA48a

ia1breispamt

R1 IA48A AMT SP BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "you".
Otherwise, display "SP".

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA48A = 1-99999999, go to BOX IA49a.

IA48b

ia1breispest

R1 IA48B EST SP BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it...

CODES

1	less than \$6,000,
2	\$6,000-11,999,
3	\$12,000-\$23,999,
4	\$24,000-\$47,999, or
5	\$48,000 or more?
	REFUSED
	DON'T KNOW

BOX IA49a

BOXIA49a

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49a.
Otherwise, go to IA50.

IA49a**ia1breiptamt**

R1 IA49A PART BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}".

Display "in the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount. The nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

If IA49A = 1-99999999, go to BOX IA50.

IA49b**ia1breiptest**

R1 IA49B EST PRT BS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it...

CODES

1	less than \$6,000,
2	\$6,000-11,999,
3	\$12,000-\$23,999,
4	\$24,000-\$47,999, or
5	\$48,000 or more?
	REFUSED
	DON'T KNOW

IA50**ia1totinc**

R1 IA50 TOTAL INCOME

ia1toincimf

R1 F IMPUTED TOTAL INC FLG

ia1toincim1

R1 IA50 IMPUTED TOTAL INC1

ia1toincim2

R1 IA50 IMPUTED TOTAL INC2

ia1toincim3

R1 IA50 IMPUTED TOTAL INC3

ia1toincim4

R1 IA50 IMPUTED TOTAL INC4

ia1toincim5

R1 IA50 IMPUTED TOTAL INC5

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your". Otherwise, display "SP's".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA1 = 1 (SP SS/RR) or 2 (SPOUSE SS/RR), display "Social Security or Railroad Retirement".

If IA4 = 1 (SP SSI) or 2 (SPOUSE SSI), display "Supplemental Security Income".

If IA5 = 1 (SP VA) or 2 (SPOUSE VA), display "the Veteran's Administration".

If IA6 = 1 (SP PENSION) or 2 (SPOUSE PENSION), display "a pension plan".

If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "any retirement accounts".

If IA8 = 1 (SP MUTUAL FUNDS), 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS), 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "bonds".

If IA10a = 1 (SP CHECKING), 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING) or IA10b = 1 (SP SAVINGS), 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS), display "bank accounts".

If IA10c = 1 (SP CDS), 2 (SPOUSE CDS) or 3 (JOINT CDS), display "CDs".

If IA13 = 1 (SP REAL ESTATE), 2 (SPOUSE REAL ESTATE) or 3 (JOINT REAL ESTATE), display "business, farm, or real estate".

If LF1 = 1 (SP WORK LAST WEEK) or LF2 = 1 (SP HAD JOB LAST WEEK) or LF3 = 1 (SP WORK LAST MONTH) or LF13 = 1 (SPOUSE WORK LAST MONTH), display "jobs".

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

Display "last year" in underlined text.

QUESTION TEXT:

Now I want to ask about {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s total income for last year, that is, for the calendar year ending in December {CURRENT YEAR - 1} before any federal or state taxes were taken out.

Now think about that total income from:

{Social Security or Railroad Retirement} {Supplemental Security Income}

{the Veteran's Administration}

{a pension plan} {any retirement accounts}

{mutual funds or stocks} {bonds}

{bank accounts} {CDs} {business, farm or real estate}

{jobs} and from any other sources.

How much was {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s total income before taxes for last year (this is, for the 12 months ending in December {CURRENT YEAR - 1})?

IF NEEDED: We don't need an exact dollar amount – the nearest \$1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER TOTAL INCOME FOR LAST YEAR

[SECTION CO]

ENTER NUMBER

Range

1 to 99999999

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA50 = 1-99,999,999, go to Section CO.

BOX IA51a

BOXIA51a

NOT ON FILE

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51a.
Otherwise, go to IA51b.

IA51a	ia1toincesjt	R1 IA51A JOINT EST TOT INCOME
	ia1eincimjf	R1 F IMPTD JOINT EST TOT INC FLG
	ia1eincimj1	R1 IA51A IMP EST JOINT TOT INC1
	ia1eincimj2	R1 IA51A IMP EST JOINT TOT INC2
	ia1eincimj3	R1 IA51A IMP EST JOINT TOT INC3
	ia1eincimj4	R1 IA51A IMP EST JOINT TOT INC4
	ia1eincimj5	R1 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA30

Was it...

CODES

1	less than \$27,600,	SECTION CO
2	\$27,600-\$41,999,	SECTION CO
3	\$42,000-\$63,999,	SECTION CO
4	\$64,000-\$107,999 or	SECTION CO
5	\$108,000 or more? REFUSED DON'T KNOW	SECTION CO SECTION CO SECTION CO

IA51B

IA51B	ia1toincessg	R1 IA51B SINGLE EST TOT INC
	ia1eincimsf	R1 F IMPUTED SGL EST TOT INC FLG
	ia1eincims1	R1 IA51B IMP EST SP SGL TOT INC1
	ia1eincims2	R1 IA51B IMP EST SP SGL TOT INC2
	ia1eincims3	R1 IA51B IMP EST SP SGL TOT INC3
	ia1eincims4	R1 IA51B IMP EST SP SGL TOT INC4
	ia1eincims5	R1 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA31

Was it...

CODES

- | | |
|---|-----------------------|
| 1 | less than \$14,000, |
| 2 | \$14,000-\$21,999, |
| 3 | \$22,000-\$35,999, |
| 4 | \$36,000-\$48,999, or |
| 5 | \$49,000 or more? |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Go to Section CO – Car Ownership.

NHATS Round 1

Section CO [CAR OWNERSHIP] Sequence: 41

CO1 **co1owncartrv** R1 CO1 OWN ANY CARS TRUCKS VANS

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER)], display “Do you”. Otherwise, display “Does SP”.

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “or {your/his/her} {husband/wife/partner}”. If HH1=2 (LIVING WITH A PARTNER), display “partner”.

If SPOUSE GENDER=1(MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “husband”.

If SPOUSE GENDER=2 (FEMALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “wife”.

If SP GENDER=1(MALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “husband”.

If SP GENDER=2 (FEMALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “wife”.

QUESTION TEXT:

{Do you/Does SP} {or {your/his/her} {husband/wife/partner}} own any cars, trucks, or vans?

IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes.

CODES

1	YES	
2	NO	SECTION EW
	REFUSED	SECTION EW
	DON'T KNOW	SECTION EW

CO2 **co1manyvhcls** R1 CO2 HOW MANY VEHICLES OWN

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”. Otherwise, display “does SP”.

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “or {your/his/her} {husband/wife/partner}”. If HH1=2 (LIVING WITH A PARTNER), display “partner”.

If SPOUSE GENDER=1(MALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “husband”.

If SPOUSE GENDER=2 (FEMALE) and [PROXY RELATIONSHIP ≠ 2 (SPOUSE/PARTNER) or PROXY flag = 2 (no)], display “wife”.

If SP GENDER=1(MALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “husband”.

If SP GENDER=2 (FEMALE) and PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “wife”.

QUESTION TEXT:

How many vehicles {do you/does SP} {or {your/his/her} {husband/wife/partner}} own?

ENTER NUMBER OF VEHICLES

ENTER NUMBER

Range	1 to 20
Soft Range	1 to 4
REFUSED	SECTION EW
DON'T KNOW	SECTION EW

PROGRAMMER INSTRUCTIONS:

Soft range: 1-4

Hard range: 1-20

BOX CO2**BOXCO2**

NOT ON FILE

If CO2=1, go to Section EW – Economic Well-being.
Otherwise, go to CO3.

CO3**co1valuevehi**

R1 CO3 VALUE HOW MUCH WOLD BRING

QUESTION TEXT:

Altogether, what is their present value, that is, about how much would they bring if {you/SP} sold them on today's market? The nearest \$1,000 is fine.

ENTER DOLLAR AMOUNT

\$

ENTER NUMBER

Range	100 to 1000000
Soft Range	1000 to 40000
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Soft range: \$1000-\$40000

Hard range: \$100-\$1000000

Use input mask in response field (\$ 999,999,999) so that dollar sign is displayed and commas are inserted appropriately.

If a dollar amount is given, skip to Section EW.

CO3A**co1vehivalue**

R1 CO3A VEHICLE VALUE

QUESTION TEXT:

SHOW CARD CO1

Would it be...

CODES

- | | |
|---|-----------------------|
| 1 | less than \$2,500, |
| 2 | \$2,500-\$4,999, |
| 3 | \$5,000-\$7,499, |
| 4 | \$7,500-\$9,999, |
| 5 | \$10,000-\$19,999, or |
| 6 | \$20,000 or more? |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Keep dollar signs & punctuation for response options exactly as detailed above.

Go to Section EW – Economic Well-being.

NHATS Round 1

Section EW [ECONOMIC WELL-BEING]

Sequence: 42

EW1

ew1pycredbal

R1 EW1 PAY OFF CREDIT CARD BALAN

DISPLAY INSTRUCTIONS:

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise display "Does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If HP2 = 2 (HAVE TRADITIONAL MORTGAGE) or HP2 = 3 (HAVE REVERSE MORTGAGE), display "other kinds of".

QUESTION TEXT:

These next questions are about {other kinds of} debt.

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} usually pay off all credit card balances every month or only the minimum amount due?

CODES

1	PAY OFF BALANCE	EW5
2	PAY MINIMUM	
3	PAY MORE THAN MINIMUM, BUT NOT ENTIRE BALANCE	
4	DON'T HAVE ANY CREDIT CARDS	EW5
	REFUSED	
	DON'T KNOW	

EW2

ew1crecardeb

R1 EW2 TOTAL CREDIT CARD DEBT

QUESTION TEXT:

SHOW CARD EW1

Adding up all credit card balances, is the amount owed....

CODES

1	less than \$1,000,
2	over \$1,000 but less than \$2,000,
3	over \$2,000 but less than \$4,000,
4	over \$4,000 but less than \$6,000,
5	over \$6,000 but less than \$10,000,
6	over \$10,000 but less than \$20,000, or \$20,000 or more?
7	REFUSED
	DON'T KNOW

EW3**ew1crecdmed**

R1 EW3 CREDIT CARD MEDICAL CARE

QUESTION TEXT:

Is any of the amount owed on credit cards for medical care?

CODES

1	YES	
2	NO	EW5
	REFUSED	EW5
	DON'T KNOW	EW5

EW4**ew1amtcrdmed**

R1 EW4 AMT ON CARDS FOR MED CARE

QUESTION TEXT:

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

CODES

1	MOST
2	SOME
3	A LITTLE
	REFUSED
	DON'T KNOW

EW5**ew1medpaovtm**

R1 EW5 MED BILLS PAID OVERTIME

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you". Otherwise, display "Does SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Display "paid off over time" in underlined text.

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any medical bills that are being paid off over time?

CODES

1	YES	
2	NO	EW7
	REFUSED	EW7
	DON'T KNOW	EW7

EW6**ew1ampadovrt**

R1 EW6 AMT FOR MED BILL OVR TIME

QUESTION TEXT:

SHOW CARD EW2

About how much is that amount? Is it...

CODES

- | | |
|---|--|
| 1 | less than \$500, |
| 2 | over \$500 but less than \$1,000, |
| 3 | over \$1,000 but less than \$2,000, |
| 4 | over \$2,000 but less than \$4,000, |
| 5 | over \$4,000 but less than \$6,000, |
| 6 | over \$6,000 but less than \$10,000, |
| 7 | over \$10,000 but less than \$20,000, or |
| 8 | \$20,000 or more? |
| | REFUSED |
| | DON'T KNOW |

EW7**ew1finhlpfam**

R1 EW7 FINANCIAL HELP FRM FAMILY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 =1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3(DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "children or other".

QUESTION TEXT:

Family members often help each other out financially. The next questions are about last year, ending December 31, {CURRENT YEAR – 1 YEAR}.

Last year, did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive any financial help or financial gifts from {children or other} relatives, either regularly – like every month – or just every so often as needed?

CODES

- | | | |
|---|------------|------|
| 1 | YES | |
| 2 | NO | EW11 |
| | REFUSED | EW11 |
| | DON'T KNOW | EW11 |

BOX EW8**BOXEW8**

NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), go to EW8.
Otherwise, go to EW10.

EW8**ew1whohelfit**

R1 EW8 CHILD HELPED FINANCIALLY

ew1whohelfiz

R1 EW8 OTHER HELPED FINANCIALLY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME

LASTNAME/SPOUSE/PARTNER FIRSTNAME/LASTNAME}'s".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Was that one of {your/SP's} {or {SP FIRSTNAME/LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} children or someone else who helped out (financially)?

SELECT ALL THAT APPLY

CODES

1	CHILD/CHILDREN	
2	SOMEONE ELSE	EW10
	REFUSED	EW10
	DON'T KNOW	EW10

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW9**op1chhlfin**

R1 EW9 CHILDREN WHO HELP FINANCE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Which children helped out (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

ENTER TEXT

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW10**ew1atchhelyr**

R1 EW10 AMT FROM CHILDR LST YR

QUESTION TEXT:

SHOW CARD EW2

About how much was that in the last year (ending December 31, {CURRENT YEAR - 1 YEAR})? Would you say...

CODES

- | | |
|---|--|
| 1 | less than \$500, |
| 2 | over \$500 but less than \$1,000, |
| 3 | over \$1,000 but less than \$2,000, |
| 4 | over \$2,000 but less than \$4,000, |
| 5 | over \$4,000 but less than \$6,000, |
| 6 | over \$6,000 but less than \$10,000, |
| 7 | over \$10,000 but less than \$20,000, or |
| 8 | \$20,000 or more? |
| | REFUSED |
| | DON'T KNOW |

EW11**ew1fingftfam**

R1 EW11 FINANCIAL GIFTS TO FAMLY

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), display "children or other".

QUESTION TEXT:

Last year, ending December 31, {CURRENT YEAR - 1 YEAR}, did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} give any financial help or financial gifts to {children or other} relatives, either regularly -- like every month -- or just every so often as needed?

CODES

- | | | |
|---|------------|----------|
| 1 | YES | |
| 2 | NO | BOX EW15 |
| | REFUSED | BOX EW15 |
| | DON'T KNOW | BOX EW15 |

BOX EW12

BOXEW12

NOT ON FILE

If any PERSON ROSTER members have relationship codes = 3 (DAUGHTER), 4 (SON), 7 (STEPDAUGHTER), or 8 (STEPSON), go to EW12.
Otherwise, go to EW14.

EW12

ew1whregoth1

R1 EW12 SP GAVE CHILD FINCL HLP

ew1whregoth2

R1 EW12 SP GAVE GRANDCHD FIN HLP

ew1whregoth3

R1 EW12 SP GAVE OTHR FINANCL HLP

DISPLAY INSTRUCTIONS:

If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:

Was that (financial) help to one of {your/SP's} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} children, a grandchild, or someone else?

SELECT ALL THAT APPLY

CODES

1	CHILD/CHILDREN	
2	GRANDCHILD/GRANDCHILDREN	EW14
3	SOMEONE ELSE	EW14
	REFUSED	EW14
	DON'T KNOW	EW14

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW13

op1hlpchfin

R1 EW13 HELPED CHILDREN FINANCE

DISPLAY INSTRUCTIONS:

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

QUESTION TEXT:

Which children were helped (financially)?

PROBE: Any other children?

SELECT ALL THAT APPLY

ENTER TEXT

PROGRAMMER INSTRUCTIONS:

Allow code all that apply

EW14

ew1amthlpgiv

R1 EW14 AMOUNT OF HELP GIVEN

QUESTION TEXT:

SHOW CARD EW2

About how much was that in the last year? Would you say...

CODES

- | | |
|---|--|
| 1 | less than \$500, |
| 2 | over \$500 but less than \$1,000, |
| 3 | over \$1,000 but less than \$2,000, |
| 4 | over \$2,000 but less than \$4,000, |
| 5 | over \$4,000 but less than \$6,000, |
| 6 | over \$6,000 but less than \$10,000, |
| 7 | over \$10,000 but less than \$20,000, or |
| 8 | \$20,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX EW15

BOXEW15

NOT ON FILE

If FACILITY flag = 1 (YES), go to Section HL - Helpers

Otherwise, go to EW15.

EW15

ew1progneed1

R1 EW15 SP RECEIVED FOOD STAMPS

ew1progneed2

R1 EW15 SP REC OTHR FOOD ASST

ew1progneed3

R1 EW15 SP REC GAS ENERGY ASST

DISPLAY INSTRUCTIONS:

If PROXY flag is null, or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}?".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

Use "Same Question Stem" display.

If at EW15a, do not display question text in brackets.
Otherwise, display question text in brackets.

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

QUESTION TEXT:

{[]} There are several state and federal programs that help people in need. In the last year, did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive help from any of these programs? {}

RESPONSE [1] a. Food stamps (also called the Supplemental Nutrition Assistance Program, or SNAP)?

RESPONSE [2] b. Other food assistance such as Meals-on-Wheels?

RESPONSE [3] c. Gas, electricity, or other energy assistance?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.
Display "variable text" in the a-c sequence until all rows have been displayed.
Go to Section HL – Helpers.

NHATS Round 1

Section HL [HELPERS]

Sequence: 43

BOX HL1PRE

BOXHL1PRE

NOT ON FILE

QUESTION TEXT

If no PERSON ROSTER MEMBERS are flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPROUNDINSIDE and
HELPSSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEDWITHLAUNDRY and
HELPEDWITHSHOPPING and
HELPEDWITHMEALS and
HELPEDWITHBANKING and
HELPEDWITHMONEYMATTERS and
HELPEDTRACKMEDS and
SATINWITHDOCTOR and
HELPEDMAKEINSURANCEDECISIONS, go to Section LS.

Else if PERSON ROSTER MEMBER flagged = 1 (YES) for
HELPSGOOUTSIDE and
HELPROUNDINSIDE and
HELPSSOUTOF BED and
TOOKPLACESMOSTOFTEN and
TOOKPLACES and
HELPSWITHHEATING and
HELPSWITHBATHING and
HELPSWITHTOILETING and
HELPSWITHDRESSING and
HELPEDWITHLAUNDRY and
HELPEDWITHSHOPPING and
HELPEDWITHMEALS and
HELPEDWITHBANKING and
HELPEDWITHMONEYMATTERS and
HELPEDTRACKMEDS and
SATINWITHDOCTOR and
HELPEDMAKEINSURANCEDECISIONS
are STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
HELPEDWITHMEALS), or MEALS ON WHEELS (for HELPEDWITHMEALS), go to Section LS.

Otherwise, go to HL1PRE.

HL1PRE

HL1PRE

NOT ON FILE

Next I have a few questions about the people who you said help {you/SP} with daily activities.

PRESS 1 AND ENTER TO CONTINUE

BOX HL1**op1ishelper**

R1 BXHL1 HELPS SP

For each PERSON ROSTER MEMBER flagged = 1 (YES) for
HELPSGOOUTSIDE or
HELPSTAROUNDINSIDE or
HELPSSOUTOF BED or
TOOKPLACESMOSTOFTEN or
TOOKPLACES or
HELPSSWITHEATING or
HELPSSWITHBATHING or
HELPSSWITHTOILETING or
HELPSSWITHDRESSING or
HELPEDWITHLAUNDRY or
HELPEDWITHSHOPPING or
HELPEDWITHMEALS or
HELPEDWITHBANKING or
HELPEDWITHMONEYMATTERS or
HELPEDTRACKMEDS or
SATINWITHDOCTOR or
HELPEDMAKEINSURANCEDECISIONs
who is not a STAFF PERSON FROM PLACE SP LIVES or RESTAURANT/TAKE OUT SERVICES (for
HELPEDWITHMEALS), or MEALS ON WHEELS (for HELPED WITH MEALS), set HELPER flag=1 (YES).

Write HELPER flag to PERSON ROSTER for each roster member.

Loop through HL1 and HL8 for each PERSON ROSTER MEMBER with a HELPER flag =1 (YES).

HL1**op1helpsched**

R1 HL1 HELP IS REG SCHEDULED

QUESTION TEXT:

Does {PERSON ROSTER MEMBER FIRSTNAME LASTNAME} have a regular schedule, or does his/her
schedule vary?

CODES

1	REGULAR	
2	VARIED	HL3
	REFUSED	HL3
	DON'T KNOW	HL3

PROGRAMMER INSTRUCTIONS:

Write HELPSCHEDULE response to PERSON ROSTER for roster member.

HL2**op1numdayswk**

R1 HL2 NUM DAYS HELP PER WK

QUESTION TEXT:

In the last month, on how many days per week did {PERSON ROSTER MEMBER FIRST NAME LASTNAME}
help {you/SP}?

ENTER NUMBER OF DAYS

ENTER NUMBER

Range	1 to 7
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write # DAYHELPWEEK response to PERSON ROSTER for roster member.

All responses go to HL4.

HL3**op1numdaysmn**

R1 HL3 NUM DAYS HELP PER MON

QUESTION TEXT:

In the last month, on how many days did {PERSON ROSTER MEMBER FIRST NAME LASTNAME} help {you/SP}?

ENTER NUMBER OF DAYS

ENTER NUMBER

Range	1 to 31
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write # DAYHELPMONTH response to PERSON ROSTER for roster member.

HL4**op1numhrsday**

R1 HL4 NUM HRS HELP PER DAY

QUESTION TEXT:

On days when {PERSON ROSTER MEMBER FIRST NAME LASTNAME} helped, about how many hours per day did (he/she) help {you/SP}?

ENTER NUMBER OF HOURS

IF LESS THAN 1 HOUR, ENTER ZERO

ENTER NUMBER

Range	0 to 24
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Write # HOURSHELP response to PERSON ROSTER for roster member.

BOX HL5**BOXHL5**

NOT ON FILE

If PERSON ROSTER member relationship = 2 (SPOUSE/PARTNER), go to BOX HL9.
Otherwise, go to HL5.**HL5****op1paidhelpr**

R1 HL5 HELPER IS PAID

QUESTION TEXT:

Is {PERSON ROSTER MEMBER FIRSTNAME LASTNAME} paid to provide this help?

CODES

1	YES	
2	NO	BOXHL9
	REFUSED	BOXHL9
	DON'T KNOW	BOXHL9

PROGRAMMER INSTRUCTIONS:

Write PAIDHELP response to PERSON ROSTER for roster member.

HL6	op1sppayhlp	R1 HL6 SP PAYS FOR HELP
	op1govpayhlp	R1 HL6 GOVT PAYS FOR HELP
	op1inspayhlp	R1 HL6 INSUR PAYS FOR HELP
	op1othpayhlp	R1 HL6 OTHER PAYS FOR HELP

QUESTION TEXT:

Is {PERSON ROSTER MEMBER FIRST NAME LASTNAME} paid by {you/SP}, {your/his/her} family, by a government program, by {your/his/her} insurance, or what?

SELECT ALL THAT APPLY

CODES

1	SP AND/OR FAMILY	BOX HL7
2	GOVERNMENT PROGRAM	BOX HL7
3	INSURANCE	BOX HL7
91	OTHER (SPECIFY)	
	REFUSED	BOX HL7
	DON'T KNOW	BOX HL7

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

Write WHOPAYS response to PERSON ROSTER for roster member.

HL6a	HL6a	NOT ON FILE
-------------	-------------	-------------

QUESTION TEXT:

SPECIFY WHO PAYS FOR PERSON WHO HELPS {SP}.

Text 50 char

ENTER TEXT

Length 50

BOX HL7	BOXHL7	NOT ON FILE
----------------	---------------	-------------

If HL6=1 (SP AND/OR FAMILY), go to HL7.
Else if HL6=2, go to HL8.
Otherwise, go to BOX HL9.

HL7	op1payunit	R1 HL7 PAYMENT UNIT
------------	-------------------	---------------------

QUESTION TEXT:

How much did {you/SP} (and {your/his/her} family) pay {PERSON ROSTER MEMBER FIRST NAME LASTNAME} last month?

INDICATE RESPONSE UNIT

CODES

1	HOURLY	HL7A
2	WEEKLY	HL7B
3	MONTHLY	HL7C
	REFUSED	BOXHL8
	DON'T KNOW	BOXHL8

PROGRAMMER INSTRUCTIONS:

Write PAYUNIT response to PERSON ROSTER for roster member.

HL7a

op1hourlypay

R1 HL7A HOURLY AMOUNT PAID

DISPLAY INSTRUCTIONS:

Collect response using dollars and cents mask (\$xxx.xx)

QUESTION TEXT:

ENTER HOURLY AMOUNT PAID
\$_____.

ENTER NUMBER

Range	1 to 999.99
Soft Range	5 to 50

PROGRAMMER INSTRUCTIONS:

Write HOURLYAMOUNT response to PERSON ROSTER for roster member.
If valid amount given, skip to Box HL8.

HL7b

op1weeklypay

R1 HL7B WEEKLY AMOUNT PAID

QUESTION TEXT:

ENTER WEEKLY AMOUNT PAID
\$_____.

ENTER NUMBER

Range	1 to 9999
Soft Range	50 to 1000

PROGRAMMER INSTRUCTIONS:

Write WEEKLYAMOUNT response to PERSON ROSTER for roster member.
If valid amount given, skip to Box HL8.

HL7c

op1monthlypay

R1 HL7C MONTHLY AMOUNT PAID

QUESTION TEXT:

ENTER MONTHLY AMOUNT PAID
\$_____.

ENTER NUMBER

Range	1 to 9999
-------	-----------

Soft Range 50 to 5000

PROGRAMMER INSTRUCTIONS:

Write MONTHLYAMOUNT response to PERSON ROSTER for roster member.

BOX HL8

BOXHL8

NOT ON FILE

If HL6=2 (GOVERNMENT PROGRAM), go to HL8.

Otherwise, go to Box HL9.

HL8

op1progmpaid

R1 HL8 PROGRAM PAID FOR HELPER

DISPLAY INSTRUCTIONS:

Display “, also known as {STATE NAME FOR MEDICAID PROGRAM}” if state name for Medicaid is not “Medicaid”.

QUESTION TEXT:

Do you know whether this program is Medicaid {, also known as {STATE MEDICAID PROGRAM NAME}}, Medicare, a state program, or something else?

CODES

1	MEDICAID	BOXHL9
2	MEDICARE	BOXHL9
3	STATE PROGRAM	BOXHL9
91	OTHER (SPECIFY)	
	REFUSED	BOXHL9
	DON'T KNOW	BOXHL9

PROGRAMMER INSTRUCTIONS:

Use NHATS State Name for Medicaid file for {STATE NAME FOR MEDICAID PROGRAM} display.
Write PROGRAMPaid response to PERSON ROSTER for roster member.

HL8a

HL8a

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER PROGRAM

Text 50 char

ENTER TEXT

Length 50

BOX HL9

BOXHL9

NOT ON FILE

Go to HL1 for next PERSON ROSTER MEMBER with HELPER flag=1 (YES).
If no additional PERSON ROSTER MEMBER with HELPER flag=1 (YES), go to Section CC – SP and Caregiver Eligibility for National Study of Caregiving (NSOC)

Derived Variables from Items in HL Section

op1dhrsmth	R1 D HL2 HL3 HL4 HRS HELP MONTH
-------------------	---------------------------------

NHATS Round 1

Section LS [NLTCS QUESTIONS]

Sequence: 45

LS1PRE

LS1PRE

NOT ON FILE

QUESTION TEXT

The last few questions we have for you may sound very similar to what you have heard already, but we need your answers to understand how differences in question wording affect health and aging trends.

PRESS 1 AND ENTER TO CONTINUE

LS1

ls1evdayact1

R1 LS1 EATING W OUT HELP SP EQUP

ls1evdayact2

R1 LS1 GET IN OUT BED W OUT HELP

ls1evdayact3

R1 LS1 GET IN OUT CHR W OUT HELP

ls1evdayact4

R1 LS1 WALK INSIDE WITHOUT HELP

ls1evdayact5

R1 LS1 GO OUTSDE W OUT HLP SP EQ

ls1evdayact6

R1 LS1 DRESSING WITHOUT HELP

ls1evdayact7

R1 LS1 BATHING WITHOUT HELP

ls1evdayact8

R1 LS1 TOILETING WITHOUT HELP

DISPLAY INSTRUCTIONS:

USE "SAME QUESTION STEM" DISPLAY FOR LS1a-LS1h

If at LS1a, do not display question text in brackets.
Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}{The next few questions are about {your/SP's} ability to do everyday activities without help. By help, I mean either the help of another person, including the people who live with {you/him/her}, or the help of special equipment. []}

{[]}{Do you/Does SP} have any problem...{[]}

{variable text a-h}

RESPONSE [1] a. eating without the help of another person or special equipment?

RESPONSE [2] b. getting in or out of bed without help?

RESPONSE [3] c. getting in or out of chairs without help?

RESPONSE [4] d. walking around inside without help?

RESPONSE [5] e. going outside without the help of another person or special equipment?

RESPONSE [6] f. dressing without help?

RESPONSE [7] g. bathing without help?

RESPONSE [8] h. getting to the bathroom or using the toilet?

CODES

- | | |
|---|--|
| 1 | YES |
| 2 | NO |
| 3 | CAN'T DO/DON'T DO
REFUSED
DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

LS2**Is1ableto1**

R1 LS2 PREPARE MEALS W OUT HELP

Is1ableto2

R1 LS2 LAUNDRY WITHOUT HELP

Is1ableto3

R1 LS2 SP ABLE LIGHT HOUSEWORK

Is1ableto4

R1 LS2 SHOP FOR GROC WOUT HELP

Is1ableto5

R1 LS2 SP ABLE MANAGE MONEY

Is1ableto6

R1 LS2 SP TAKE MEDS WOUT HELP

Is1ableto7

R1 LS2 SP MAKE TELEPHONE CALLS

DISPLAY INSTRUCTIONS:

USE "SAME QUESTION STEM" DISPLAY FOR LS2a-LS2g.

If at LS2a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{[Are you/Is SP} able to...]}

IF SP DOES NOT DO, BUT IS ABLE TO DO AN ACTIVITY, CODE "YES" FOR THE ACTIVITY

{variable text a-g}

RESPONSE [1] a. prepare meals without help?

RESPONSE [2] b. do laundry without help?

RESPONSE [3] c. do light housework such as washing dishes?

RESPONSE [4] d. shop for groceries without help?

RESPONSE [5] e. manage money, such as keeping track of bills and handling cash?

RESPONSE [6] f. take medicine without help?

RESPONSE [7] g. make telephone calls without help?

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

If LS2a=2 (NO), display LS3a.
 If LS2b=2 (NO), display LS3b.
 If LS2c=2 (NO), display LS3c.
 If LS2d=2 (NO), display LS3d.
 If LS2e=2 (NO), display LS3e.
 If LS2f=2 (NO), display LS3f.
 If LS2g=2 (NO), display LS3g.
 Otherwise, go to Section CL – Closing.

LS3

ls1diskefrm1
ls1diskefrm2
ls1diskefrm3
ls1diskefrm4
ls1diskefrm5
ls1diskefrm6
ls1diskefrm7

R1 LS3 DIS KEEPS FROM MEAL PREP
 R1 LS3 DIS KEEPS FROM LAUNDRY
 R1 LS3 DIS KEEPS FRM LGHT HOUSWK
 R1 LS3 DIS KEEPS FRM SHOP GROC
 R1 LS3 DIS KEEPS FRM MANAGE MONY
 R1 LS3 DIS KEEPS FROM TAKE MEDS
 R1 LS3 DIS KEEPS FROM TELEPHONE

DISPLAY INSTRUCTIONS:

USE "SAME QUESTION STEM" DISPLAY FOR LS3a-LS3g

If at LS3a, do not display question text in brackets.
 Otherwise, display question text in brackets.

QUESTION TEXT:

{[Does a disability or a health problem keep {you/SP} from...]}

{variable text a-g}

RESPONSE [1] a. preparing meals?
 RESPONSE [2] b. doing laundry?
 RESPONSE [3] c. doing light housework?
 RESPONSE [4] d. shopping for groceries?
 RESPONSE [5] e. managing money?
 RESPONSE [6] f. taking medicine?
 RESPONSE [7] g. making telephone calls?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Array the responses and Variable text columns in the panel.

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

Go to Section CL – Closing.

NHATS Round 1

Section IR [INTERVIEWER REMARKS]

Sequence: 47

BOX IR1 **BOXIR1** NOT ON FILE

If FQ task = code 20 (COMPLETED) and NHATS Int = 24 (not required), go to IR17.
Otherwise, go to IR1.

IR1 **IR1** NOT ON FILE

QUESTION TEXT:

Was the SP interview completed in person or by telephone?

CODES

- | | | |
|---|-----------|-----|
| 1 | In person | IR2 |
| 2 | Telephone | |
-

IR1a **IR1a** NOT ON FILE

QUESTION TEXT:

Describe why the SP interview was conducted by telephone.

ENTER TEXT

Length 500

IR2 **ir1spattitud** R1 IR2 SP ATTITUDE TOWARD INTVW

QUESTION TEXT:

In general, what was the respondent's attitude toward the interview?

CODES

- | | |
|---|---|
| 1 | Friendly and interested |
| 2 | Cooperative but not particularly interested |
| 3 | Impatient and restless |
| 4 | Hostile |
-

IR3 **ir1undrstand** R1 IR3 SP UNDERSTAND QUESTION

QUESTION TEXT:

In general, how was the respondent's understanding of the questions?

CODES

- | | | |
|---|------|---------|
| 1 | Good | Box IR4 |
| 2 | Fair | |
| 3 | Poor | |

IR3A**IR3A**

NOT ON FILE

QUESTION TEXT:

Describe any circumstances that may have affected SP's understanding of the questions.

ENTER TEXT

Length 500

BOXIR4**BOXIR4**

NOT ON FILE

QUESTION TEXT:

If PROXY, flag = 1 (yes), go to IR4
Otherwise go to IR6

IR4**ir1sppresent**

R1 IR4 AMT OF INTERVIW SP PRESENT

QUESTION TEXT:

About how much of the interview was the SP present for?

CODES

1	All of the time	IR6
2	Most of the time	IR6
3	Some of the time	IR6
4	Only for the cognition and/or performance parts	IR6
5	None of the time	

IR5**IR5**

NOT ON FILE

QUESTION TEXT:

Explain why the SP wasn't present for the interview.

ENTER TEXT

Length 500

IR6**ir1intvwhlp**

R1 IR6 ANYONE HELP WITH INTVW

DISPLAY INSTRUCTIONS:

If PROXY flag = 1 (yes), display "and the proxy".

QUESTION TEXT:

Besides the SP {and the proxy}, was there anyone else who helped answer questions during the interview?

CODES

1	YES	
2	NO	IR7
3	Interview was conducted by telephone	IR7

IR6A	ir1prsnhlp1	R1 IR6A SPOUSE HELPED WITH INTVW
	ir1prsnhlp2	R1 IR6A CHILD HELPED WITH INTVW
	ir1prsnhlp3	R1 IR6A RELATIVE HELP WITH INTVW
	ir1prsnhlp4	R1 IR6A FRIEND HELPED WITH INTVW
	ir1prsnhlp5	R1 IR6A STAFF HELPED WITH INTVW
	ir1prsnhlp6	R1 IR6A AIDE HELPED WITH INTVW
	ir1prsnhlp91	R1 IR6A OTHER HELPED WITH INTVW

QUESTION TEXT:

Select type (s) of persons who helped answer questions during the interview.

Select all the apply

CODES	Code All That Apply
1	Spouse/Partner
2	Child of SP
3	Other relative
4	Friend/Neighbor
5	Staff person from place SP lives
6	Personal helper/aide
91	Other

IR7 **IR7** NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the SP cognition section?

CODES		
1	Yes	
2	No	IR8
3	Not Administered	IR8

IR7A **IR7A** NOT ON FILE

QUESTION TEXT:

Describe problems or issues with SP cognitive section.

ENTER TEXT Length 500

IR8

IR8

NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with CAPI?

CODES

- | | |
|---|-----|
| 1 | Yes |
| 2 | No |

IR10

IR8A

IR8A

NOT ON FILE

QUESTION TEXT:

Describe problems or issues CAPI.

ENTER TEXT

Length 500

IR10

IR10

NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the performance measures?

CODES

- | | |
|---|------------------|
| 1 | Yes |
| 2 | No |
| 3 | Not Administered |

IR11

IR10A

IR8A

NOT ON FILE

QUESTION TEXT:

Describe the performance measures problems or issues

ENTER TEXT

Length 500

IR11

IR11

NOT ON FILE

QUESTION TEXT:

Did you encounter any problems or issues with administering the STROOP task?

CODES

- | | |
|---|------------------|
| 1 | Yes |
| 2 | No |
| 3 | Not Administered |

IR12

IR12

IR11A**IR11A**

NOT ON FILE

QUESTION TEXT:

Describe problems or issues with the STROOP task.

ENTER TEXT

Length

500

IR12**ir1sessions**

R1 IR12 MORE ONE INTVW SESSION

QUESTION TEXT:

Did you have to complete the SP interview in more than one session?

CODES

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

R12C

IR12A**ir1sessrsn1**

R1 IR12A MORE 1 SESSION SP TIRED

ir1sessrsn2

R1 IR12A MORE 1 SESSION SP ILL

ir1sessrsn3

R1 IR12A MORE 1 SESSION SCHEDULE

ir1sessrsn91

R1 IR12A MORE 1 SESSION OTHER

QUESTION TEXT:

Select reason (s) for completing interview in more than 1 session.

Select all the apply

CODES

- | | |
|----|---|
| 1 | SP/Proxy too tired to complete in 1 session |
| 2 | SP/Proxy felt poorly/ill/SP's health |
| 3 | Schedule conflict for respondent |
| 91 | Other (Specify) |

PROGRAMMER INSTRUCTIONS:

If 91 selected by itself or with any other response, go to IR12B.
Otherwise, go to IR12C.

IR12B**IR12B**

NOT ON FILE

QUESTION TEXT:

Describe other reason why the interview was completed in more than 1 session.

ENTER TEXT

Length

500

IR12C

ir1conhomapt

R1 IR12C INTRV CONDTD AT HME/APT

QUESTION TEXT:

Was the entire interview conducted inside SP's home/apartment/unit?

CODES

1	YES	BOX IR13
2	NO	

IR12D

IR12D

NOT ON FILE

QUESTION TEXT:

Describe where the interview was completed and why it was not administered in SP's home/apartment/unit?

ENTER TEXT

Length

500

IR12E

ir1insidhome

R1 IR12E GO INSIDE HOME/APT/UNIT

QUESTION TEXT:

Did you go inside SP's home/apartment/unit?

CODES

1	YES
2	NO

BOXIR13

BOXIR13

NOT ON FILE

QUESTION TEXT:

If IR12C = 1 (ENTIRE INTERVIEW IN HOME) or IR12e = 1 (WENT INSIDE HOME), go to IR13.
Otherwise go to IR15.

IR13

ir1condihom1

R1 IR13 PAINT PEELING IN SP HOME

ir1condihom2

R1 IR13 PESTS IN SP HOME

ir1condihom3

R1 IR13 BROKN FURNITURE SP HOME

ir1condihom4

R1 IR13 FLOORING NEEDS REPAIR

ir1condihom5

R1 IR13 HOME OTHR RIPPING HAZRD

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at IR13a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}{Inside the SP's home/apartment/unit, did you observe...[]}

{variable text [a-e]}

RESPONSE [1] a. peeling or flaking paint?

RESPONSE [2] b. evidence of pests (e.g., cockroaches, rodents, etc.)?

RESPONSE [3] c. broken furniture or lamps?

RESPONSE [4] d. flooring in need of repair (e.g., torn carpet, broken tiles, split wood)?

RESPONSE [5] e. other tripping hazards (e.g., pathways not clear, throw rugs not secured, electrical cords in path)?

CODES

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

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

IR14**ir1clutter1**

R1 IR14 CLUTTR IN INTERVIEW ROOM

ir1clutter2

R1 IR14 CLUTTR IN OTHR SP ROOMS

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display.

If at IR14a, do not display question text in brackets.

Otherwise, display question text in brackets.

QUESTION TEXT:

{[]}{How cluttered...[]}

{variable text [a-b]}

RESPONSE [1] a. was the room where the interview was held?

RESPONSE [2] b. were the other rooms in the SP's home/apartment/unit?

CODES

- | | |
|---|---------------------------|
| 1 | Not at all cluttered |
| 2 | Somewhat cluttered |
| 3 | Very cluttered |
| 4 | Could not see other rooms |

PROGRAMMER INSTRUCTIONS:

Array the responses and variable text columns in the panel.

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

IR15**ir1areacond1**

R1 IR15 LITTER GLASS ON SDWLK ST

ir1areacond2

R1 IR15 GRAFFITI ON BUILDG WALLS

ir1areacond3

R1 IR15 VACANT HOUSES OR STORES

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display.
 If at IR15a, do not display question text in brackets.
 Otherwise, display question text in brackets.

QUESTION TEXT:

REFER TO THE HOME ENVIRONMENT CHECKLIST EC2a-d ITEMS WHEN ANSWERING THESE QUESTIONS.

{[]} When standing in front of the SP's home/building, and looking around in every direction, how much of the following did you see?{[]}

{variable text [a-d]}

RESPONSE [1] a. Litter, broken glass, or trash, on sidewalks and streets?

RESPONSE [2] b. Graffiti on buildings and walls?

RESPONSE [3] c. Vacant or deserted houses or storefronts?

RESPONSE [4] d. Houses with foreclosure signs?

CODES

- | | |
|---|----------|
| 1 | None |
| 2 | A little |
| 3 | Some |
| 4 | A lot |

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.

IR16**ir1condhome1**

R1 IR16 BROKEN WINDOWS IN HOME

ir1condhome2

R1 IR16 CRUMBLNG FOUNDTN IN HOME

ir1condhome3

R1 IR16 MISSING BRCKS SIDNG IN HM

ir1condhome4

R1 IR16 ROOF PROBLEM IN HOME

ir1condhome5

R1 IR16 BROKEN STEPS TO HOME

DISPLAY INSTRUCTIONS:

Use “Same Question Stem” display.
 If at IR16a, do not display question text in brackets.
 Otherwise, display question text in brackets.

QUESTION TEXT:

REFER TO THE HOME ENVIRONMENT CHECKLIST EC3a-e ITEMS WHEN ANSWERING THESE QUESTIONS

{[]} Standing in front of the SP's home/building, did it have...{[]}

{variable text [a-e]}

RESPONSE [1] a. any broken or boarded up windows?

RESPONSE [2] b. a crumbling foundation or open holes?

RESPONSE [3] c. missing bricks, siding, or other outside materials?

RESPONSE [4] d. roof problems (e.g., missing material, sagging, or a hole in roof)?
RESPONSE [5] e. uneven walking surfaces or broken steps in the area leading to the home/building?

CODES

- | | |
|---|-------------------|
| 1 | YES |
| 2 | NO |
| 7 | COULD NOT OBSERVE |

PROGRAMMER INSTRUCTIONS:

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

BOXIR19

BOXIR19

NOT ON FILE

QUESTION TEXT:

If FQ task = code 20 (COMPLETED), go to IR19.
Otherwise END

IR19

IR19

NOT ON FILE

QUESTION TEXT:

Were there any problems or issues administering the Facility Questionnaire?

CODES

- | | |
|---|-----|
| 1 | YES |
| 2 | NO |
- IR20
-

IR19A

IR19A

NOT ON FILE

QUESTION TEXT:

Describe problems or issues with administering the Facility Questionnaire.

ENTER TEXT

Length 500

IR20

IR20

NOT ON FILE

QUESTION TEXT:

Was more than 1 facility respondent needed to complete the Facility Questionnaire?

CODES

- | | |
|---|-----|
| 1 | YES |
| 2 | NO |
- IR21
-

IR20A

IR20A

NOT ON FILE

QUESTION TEXT:

Describe why more than 1 facility respondent need to complete the Facility Questionnaire.

ENTER TEXT

Length 500

IR21**ir1fqphrnprsn****R1 IR21 FQ IN PERSON OR BY PHONE****QUESTION TEXT:**

Was the Facility Questionnaire completed in person or by telephone?

CODES

- | | |
|---|-----------|
| 1 | In person |
| 2 | By Phone |
-

NHATS Round 1

Section FQ [FACILITY STAFF QUESTIONNAIRE]

Sequence: 48

FQ1PRE

FQ1PRE

NOT ON FILE

QUESTION TEXT

YOU HAVE SELECTED THE FACILITY STAFF QUESTIONNAIRE (FQ) FOR CASE
{CASE ID}, {SP}

IF THIS IS CORRECT, PRESS 1 AND ENTER TO CONTINUE

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

FQ1Consent

FQ1Consent

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE

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

CODES

1

CONSENT TO RECORDING

FQ1a

7

REFUSE CONSENT TO RECORD

FQ1NotRec

FQ1NotRecord

NOT ON FILE

QUESTION TEXT:

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

PRESS 1 AND ENTER TO CONTINUE.

FQ1a

FQ1a

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "FIRST" in bold underlined text.

Display FQ1a and FQ1b on the same screen.

QUESTION TEXT:

First, I would like to confirm your name and contact information.

What is your name?

ENTER FIRST NAME. CONFIRM SPELLING.

ENTER TEXT

Length

25

FQ1b

FQ1b

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "LAST" in bold underlined text.
Display FQ1a and FQ1b on the same screen.

QUESTION TEXT:

ENTER LAST NAME. CONFIRM SPELLING.

ENTER TEXT

Length	25
--------	----

FQ2

FQ2

NOT ON FILE

QUESTION TEXT:

What is your job title?

ENTER TEXT

Length	50
--------	----

FQ3a

FQ3a

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "address" as underlined text.

QUESTION TEXT:

What is the mailing address here?

CONFIRM SPELLING

ENTER TEXT

Length	25
--------	----

FQ3b

FQ3b

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "address" as underlined text.

QUESTION TEXT:

[What is the mailing address here?]

CONFIRM SPELLING

IF NO APT/SUITE NUMBER, PRESS ENTER TO CONTINUE

ENTER TEXT

Length	25
--------	----

PROGRAMMER INSTRUCTIONS:

Allow empty

FQ3c**fq1facadcity**

R1 FQ3C FAC ADDRESS CITY

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "city" as underlined text.

QUESTION TEXT:

[What is the city?]

CONFIRM SPELLING

ENTER TEXT

Length

25

FQ3d**fq1facadstat**

R1 FQ3D FACIL ADDRESS STATE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "state" as underlined text.

QUESTION TEXT:

[What is the state?]

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

Use lookup file of state names.

FQ3e**fq1facaddzip**

R1 FQ3E FAC ADDRESS ZIP CODE

DISPLAY INSTRUCTIONS:

Display FQ3a, 3b, 3c, 3d, and 3e on the same screen.
Display "zip code" as underlined text.

QUESTION TEXT:

[What is the zip code?]

ENTER A 5-DIGIT ZIP CODE

ENTER TEXT

Length

5

PROGRAMMER INSTRUCTIONS:

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

FQ4

FQ4

NOT ON FILE

QUESTION TEXT:

What is your email address here?

ENTER 97 IF NO EMAIL ADDRESS

ENTER TEXT

Length
REFUSED

50

FQ5

FQ5

NOT ON FILE

DISPLAY INSTRUCTIONS:

Display "whole" as bold underlined text.

QUESTION TEXT:

What is the name of this place? If there are different names for certain parts or levels of care in this place, please tell me the name for the whole place.

ENTER TEXT

Length

75

FQ6

fq1dfacdescr

R1 FQ6 FACILITY TYPE

DISPLAY INSTRUCTIONS:

Display text from FQ5 as FACILITY NAME.

Display "whole" as underlined text.

QUESTION TEXT:

SHOW CARD FQ1

Now I'm going to show you a list of places.

Which of these BEST describes {FACILITY NAME FROM FQ5}? Again, if there are different parts or levels of care in this place, please tell me about the whole place.

PRESS F1 FOR HELP SCREEN.

CODES

1	FREE STANDING NURSING HOME	FQ15
2	FREE STANDING ASSISTED LIVING FACILITY	FQ7
3	NURSING HOME AND ASSISTED LIVING FACILITY	FQ7
4	CONTINUING CARE RETIREMENT COMMUNITY (CCRC)	FQ7
5	ADULT FAMILY CARE HOME	FQ15
6	GROUP HOME	FQ15
7	BOARD AND CARE HOME	FQ15
8	RETIREMENT COMMUNITY OR SENIOR HOUSING (NOT CCRC)	FQ7
91	OTHER (SPECIFY) REFUSED DON'T KNOW	FQ7 FQ7 FQ7

FQ6a**fq1dosfacd**

R1 FQ6A OTHER SPECIFY FAC TYPE

QUESTION TEXT:

SPECIFY TYPE OF PLACE

ENTER TEXT

Length

50

FQ7**FQ7**

NOT ON FILE

QUESTION TEXT:

Next, I need to confirm where {SP} is living.

PRESS 1 AND ENTER TO CONTINUE

FQ8**fq1prtlivnam**

R1 FQ8 FAC NM DIFF4PLC SP LIVES

QUESTION TEXT:

Does the part of {PLACE NAME FROM FQ5} in which {SP} lives have a different name?

CODES

1	YES	
2	NO	FQ10
	REFUSED	FQ10
	DON'T KNOW	FQ10

FQ9**FQ9**

NOT ON FILE

QUESTION TEXT:

What is the name of {SP}'s area?

ENTER TEXT

Length

50

FQ10**fq1dfacarea**

R1 FQ10 FACILITY AREA SP LIVES

QUESTION TEXT:

Is the place where {SP} lives considered independent living, assisted living, a special care unit, a nursing home care unit, or something else?

CODES

1	INDEPENDENT LIVING	FQ12
2	ASSISTED LIVING	FQ12
3	SPECIAL CARE, MEMORY CARE, OR ALZHEIMER'S UNIT	FQ11
4	NURSING HOME	FQ12
91	OTHER (SPECIFY)	

REFUSED
DON'T KNOW

FQ12
FQ12

FQ10a**fq1dosfaca**

R1 FQ10A OTHER SPECIFY FAC AREA

QUESTION TEXT:

SPECIFY OTHER TYPE OF PLACE

ENTER TEXT

Length 50

PROGRAMMER INSTRUCTIONS:

Go to FQ12

FQ11**fq1assdnrsng**

R1 FQ11 ASSIST LIV OR NURSG HOME

QUESTION TEXT:

Is this special care unit part of an assisted living facility or is it part of a nursing home?

CODES

- | | |
|---|-----------------|
| 1 | ASSISTED LIVING |
| 2 | NURSING HOME |
| | REFUSED |
| | DON'T KNOW |

FQ12**fq1othrlevls**

R1 FQ12 OTH LEVELS OF CARE AVAIL

QUESTION TEXT:

Besides where {SP} lives, are there other levels of care available at {PLACE NAME FROM FQ5} such as independent living, assisted living, a special care unit, or a nursing home care unit?

CODES

- | | | |
|---|------------|------|
| 1 | YES | FQ13 |
| 2 | NO | FQ15 |
| | REFUSED | FQ15 |
| | DON'T KNOW | FQ15 |

FQ13**fq1whotlevl1**

R1 FQ13 INDEPDNT LIV CARE AVAIL

fq1whotlevl2

R1 FQ13 ASSISTED LVNG CARE AVAIL

fq1whotlevl3

R1 FQ13 ALZHEIMER CARE AVAIL

fq1whotlevl4

R1 FQ13 NURSING HOME CARE AVAIL

fq1whotlevl5

R1 FQ13 OTHR SPECIFY CARE AVAIL

QUESTION TEXT:

What other levels of care are available?

SELECT ALL THAT APPLY

CODES

1	INDEPENDENT LIVING	FQ15
2	ASSISTED LIVING	FQ15
3	SPECIAL CARE, MEMORY CARE, OR ALZHEIMER'S UNIT	FQ15
4	NURSING HOME	FQ15
91	OTHER (SPECIFY)	
	REFUSED	FQ15
	DON'T KNOW	FQ15

FQ13a

FQ13a

NOT ON FILE

QUESTION TEXT:

SPECIFY OTHER LEVELS OF CARE

ENTER TEXT

Length	50
--------	----

FQ15

fq1servaval1	R1 FQ15 MEALS AVAIL
fq1servaval2	R1 FQ15 HELP WITH MEDS AVAIL
fq1servaval3	R1 FQ15 HELP W BATH DRESS AVAIL
fq1servaval4	R1 FQ15 LAUNDRY SERVCS AVAIL
fq1servaval5	R1 FQ15 HOUSEKEEPING SERV AVAIL
fq1servaval6	R1 FQ15 TRANSPRT MED CARE PROV
fq1servaval7	R1 FQ15 TRANSPRT TO STORE EVENT
fq1servaval8	R1 FQ15 RECREATIONAL FAC AVAIL
fq1servaval9	R1 FQ15 SOCIAL EVENTS AVAIL

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at FQ15a, do not display question text in brackets.
Otherwise, display question text in brackets.

Display "at {SP}'s current level of care" and "offered" as bold underlined text.

QUESTION TEXT:

SHOW CARD FQ2

{[]}We are interested in the services that are available to people at {SP}'s current level of care. Please look at this list. {}

{[]}For each service, please tell me if the service is offered to people at {SP}'s level of care. If the service is offered, please also indicate whether it is part of {SP}'s package of services provided by {PLACE NAME from FQ5} or if there is an extra charge for it. {}

{variable text [a-i]}

RESPONSE [1] a. Meals (in common dining areas or in resident's own rooms)?

RESPONSE [2] b. Help with medications?

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

RESPONSE [4] d. Laundry services for linens or clothing?
RESPONSE [5] e. Housekeeping services?
RESPONSE [6] f. A van or shuttle to doctors or other medical care providers?
RESPONSE [7] g. A van or shuttle to stores or events like concerts?
RESPONSE [8] h. Recreational facilities, like swimming pools, game rooms, or tennis courts, for residents?
RESPONSE [9] i. Organized social events and activities?

CODES

- | | |
|---|--|
| 1 | YES, SERVICE PROVIDED AS PART OF PACKAGE |
| 2 | YES, SERVICE PROVIDED AT AN EXTRA CHARGE |
| 3 | NO, SERVICE NOT PROVIDED |
| | REFUSED |
| | DON'T KNOW |

PROGRAMMER INSTRUCTIONS:

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

FQ16PRE**FQ16PRE**

NOT ON FILE

QUESTION TEXT:

These next questions are about the sources of payment for {SP}'s care.

PRESS 1 AND ENTER TO CONTINUE

FQ16**fq1paysourc1**

R1 FQ16 SP OR SP FAMILY PAYMENT

fq1paysourc2

R1 FQ16 SOC SEC SSI PAYMENT

fq1paysourc3

R1 FQ16 MEDICAID PAYMENT

fq1paysourc4

R1 FQ16 MEDICARE PAYMENT

fq1paysourc5

R1 FQ16 PRIVATE INSURANCE PAYMNT

fq1paysourc6

R1 FQ16 OTHR GOVT PAYMENT

DISPLAY INSTRUCTIONS:

Use "Same Question Stem" display

If at FQ16a, do not display question text in brackets.

Otherwise, display question text in brackets.

If FQ6=1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME),
display FQ16d {Medicare}.

Display dollar amounts using commas to separate zeroes.

QUESTION TEXT:

SHOW CARD FQ3

{[In the last billing month for which you have complete payment information, what did each of these
sources pay for {SP}'s care?]}{}

{[For each one, please tell me the total amount paid by each source for this part of {SP}'s care.]}{}

ENTER DOLLAR AMOUNT

ENTER ZERO IF NO PAYMENT FROM SOURCE.

{variable text [a-f]}

RESPONSE [1] a. SP OR SP'S FAMILY

RESPONSE [2] b. SOCIAL SECURITY OR SSI

RESPONSE [3] c. MEDICAID

RESPONSE [4] d. MEDICARE

RESPONSE [5] e. PRIVATE INSURANCE

RESPONSE [6] f. OTHER GOVERNMENT SOURCE (VA, STATE, COUNTY)

ENTER NUMBER

Range

0 to 26000

Soft Range

0 to 10000

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.

Hard range error 13 "VALUE OUT OF RANGE. VERIFY WITH RESPONDENT AND RE-ENTER ANSWER."

Soft range error "UNLIKELY RESPONSE - PLEASE VERIFY WITH RESPONDENT. SUPPRESS TO ACCEPT RESPONSE AND CONTINUE. OTHERWISE, CLOSE TO RE-ENTER ANSWER."

BOX FQ17

BOXFQ17

NOT ON FILE

If DK or RF entered at FQ16 for any amount category, go to FQ19.

Otherwise, go to FQ17.

FQ17

fq1totalpaym

R1 FQ17 TOTAL PAYMENT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using commas to separate zeroes.

QUESTION TEXT:

That adds up to {TOTAL AMOUNT CALCULATED FROM FQ16}.

Is that the total monthly payment for {SP}'s care?

CODES

1 YES

FQ19

2 NO

FQ19

REFUSED

FQ19

DON'T KNOW

FQ19

FQ18

fq1tmnthlyamt

R1 FQ18 TOT MTHLY AMT FOR CARE

DISPLAY INSTRUCTIONS:

Display dollar amounts using commas to separate zeroes.

QUESTION TEXT:

What is the (approximate) total monthly amount for {SP}'s care?

ENTER AMOUNT

ENTER NUMBER

Range	0 to 26000
REFUSED	
DON'T KNOW	

FQ19**fq1primpayer**

R1 FQ19 PRIMARY PAYER FOR CARE

DISPLAY INSTRUCTIONS:

If FQ6=1 (FREE STANDING NURSING HOME) or FQ10=4 (NURSING HOME), OR FQ11=2 (NURSING HOME), display {Medicare,} and response category 4.

QUESTION TEXT:

Would you say the primary payer for {SP}'s care is {SP} or {his/her} family, Social Security, Medicaid, {Medicare,} or some other source?

CODES

1	SP/FAMILY	FQ21
2	SOCIAL SECURITY/SSI	FQ21
3	MEDICAID	FQ21
4	MEDICARE	FQ21
5	OTHER SOURCE	FQ21
	REFUSED	
	DON'T KNOW	FQ21

FQ20**fq1govsource**

R1 FQ20 GOVERNMENT SOURCE

QUESTION TEXT:

Is that a government source?

CODES

1	YES
2	NO
	REFUSED
	DON'T KNOW

FQ21**FQ21**

NOT ON FILE

YOU HAVE COMPLETED THE FACILITY STAFF QUESTIONNAIRE. THANK RESPONDENT.

PRESS 1 AND ENTER TO CONTINUE

FQ22**FQ22**

NOT ON FILE

DISPLAY INSTRUCTIONS:

If FQ6 = 1 or [(FQ6 = 2 or 3 or 4 or 8 or 91 or DK or RF) and FQ10 = 4] or FQ11 = 2, set FACILITY TYPE flag = 1

(NURSING HOME), and display "SP HAS BEEN IDENTIFIED AS LIVING IN A NURSING HOME. NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE."

QUESTION TEXT:

{SP HAS BEEN IDENTIFIED AS LIVING IN A NURSING HOME.

NO ADDITIONAL DATA COLLECTION REQUIRED FOR THIS CASE.}

PRESS 1 AND ENTER TO RETURN TO IMS SCREEN

PROGRAMMER INSTRUCTIONS:

If FQ8=1 (YES), FACILITY NAME = text from FQ9.

Else FACILITY NAME = text from FQ5.

Write FACILITY NAME to Management file for use in the NHATS Int task and the IRQ.

If FQ6 = 1 or [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) and FQ10 = 4] or FQ11 = 2, set FACILITY TYPE flag = 1 (NURSING HOME)

If FACILITY TYPE flag = 1 (NURSING HOME), set NHATS Int Task=code 24 (FINAL NOT REQUIRED) and Stroop Task=code 24 (FINAL NOT REQUIRED) and set the final case status to code 61, "Complete, NH Facility".

If FQ11 = 1, set FACILITY TYPE flag = 2 (OTHER FACILITY)

If FQ6 = 5 or 6 or 7, set FACILITY TYPE flag = 2 (OTHER FACILITY)

If [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) AND (FQ10 = 1 or 2 or 91)] OR [(FQ6 = 2 or 3 or 4 or 8 or 91 or RF or DK) AND FQ10 = 3 AND (FQ11 = DK or RF)] OR [(FQ6 = 2 or 3 or 4 or 8 or 91) AND (FQ10 = RF or DK)], set FACILITY TYPE flag = 2 (OTHER FACILITY)

If FACILITY TYPE flag = 1 or 2, set FACILITY flag = 1 (YES)

Write FACILITY TYPE flag and FACILITY flag to Management file for use in the NHATS Int task and the IRQ.

Our records indicate the information below for {SP FIRST NAME} {SP MIDDLE NAME} {SP LAST NAME}.

If this information is INCORRECT, please fill in the correct information below and return this letter to Westat in the enclosed postage-paid return envelope. If this information is CORRECT, you do not need to return this letter.

Corrected information:

Date of Birth: {DOB}

Gender: {Gender}

Race: {Race}

Derived Variables from the FQ Section

fq1dlocsp	R1 D FQ6 6A 10 10A FOR SAMP WGT
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