

HRS 2022 -- SECTION A: COVERSCREEN
COMMENTED VERSION -- 05/12/2022

***** NOTE FOR REVIEWERS *****

ALL CHANGES FOR THE 2022 WAVE INSTRUMENT ARE FLAGGED WITH
#@ LOCATED ON THE RIGHT SIDE OF THE CHANGED ITEM OR SERIES.
THUS, ALL CHANGES CAN BE LOCATED BY SEARCHING FOR #@ IN THE DESIGN
CHANGE COMMENTS COLUMN.

CHANGES IN ITEMS THAT WERE IN THE 2020 INSTRUMENT APPEAR IN RED.

NEW QUESTIONS AND ASSOCIATED NEW BRANCHPOINTS, ETC., APPEAR IN BLUE
SANDWICHED BETWEEN ROWS OF *****.

NOTE ABOUT BRANCHPOINTS:

WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX, THE
JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.

NOTE ABOUT COLORS:

ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.

ALL TEXT IN FUCHSIA IS SPECIFIC TO THE EXIT INTERVIEW.

THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK TEXT
CAN ALSO APPLY TO THE EXIT OR WEB INTERVIEW WHEN THERE ARE NO
DIFFERENCES FROM THE CORE.

NOTE ABOUT BOLD/UNDERLINE TEXT:

ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD IN CAPI
AND WILL BE UNDERLINED FOR CAWI.

NOTE ABOUT EXIT INTERVIEW Rs:

ANY NEW SPOUSE/PARTNER THAT AN EXIT INTERVIEW R ACQUIRED SINCE HIS/HER LAST INTERVIEW IS IGNORED FOR THE PURPOSES OF THIS INTERVIEW. SIMILARLY, A SPOUSE/PARTNER WHO WAS REPORTED IN A PREVIOUS WAVE BUT WHO HAS NEVER BEEN INTERVIEWED WILL NOT HAVE AN EXIT INTERVIEW.

SINCE EXIT INTERVIEW R_s ARE REINTERVIEW R_s, QUESTIONS NOT ASKED OF REINTERVIEW R_s ALSO ARE NOT ASKED OF EXIT R_s, UNLESS OTHERWISE NOTED.

NOTE ABOUT NEW COHORTS:

EVERY THREE WAVES (SIX YEARS) A NEW COHORT OF HOUSEHOLDS IS ADDED TO THE SAMPLE. THIS WAS DONE IN - 2004, 2010, 2016 AND WILL BE DONE AGAIN IN 2022. MENTION OF 'SCREENER' IN THIS DOCUMENT REFERS TO INFORMATION GATHERED DURING INITIAL CONTACT WITH THE R AND/OR HOUSEHOLD.

NOTE ABOUT NON-RESPONSE FLOW:

ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN CAWI INTERVIEWS WILL FOLLOW THE SAME PATH AS A REFUSAL FOR THAT QUESTION, UNLESS OTHERWISE SPECIFIED.

NOTE: IWER WILL READ CONFIDENTIALITY STATEMENT UPON RESUMING FROM ANY SUSPENDED SESSION. SEE APPENDIX FOR CONFIDENTIALITY STATEMENT

Introduction and Navigation for CAWI interview

A000_1 BRANCHPOINT: IF THIS IS A ~~CAPI~~ CAWI IW, ASK

ELSE, GO TO A006

#@DM5 MM
(7/14/2022)
corrected
Branchpoint to
state CAWI
instead of CAPI
#49847

A000_1

We would like to thank you for your ongoing participation in the Health and Retirement Study. Your contributions have been very important in helping to understand the health and economic circumstances of people around the country.

This survey can be completed over several sessions if you prefer. To save you time, we have filled in some information that you have provided during previous interviews.

The survey is hosted on a secure website. The information you provide is protected and will be kept confidential.

For some questions you will notice a MORE INFO button. This contains additional guidance to help you answer the question. If you would like to add a comment or explanation for any question, use the COMMENT button.

We recommend that you use the 'Next' and 'Previous' buttons to navigate through the questions since 'Enter' and 'Tab' functions can work very differently in certain browsers.

A000_2

If you need help or have questions, our contact information is located at the bottom of every screen. The phone line will be staffed between 9am and 7pm eastern time on Monday through Friday and between 10am and 2pm on Saturday.

If you need to leave the survey, your responses will be saved and you can return where you left off.

A006

[INSTR: THIS SURVEY IS INTENDED FOR [R FIRST NAME (X058AFNAME)] [LAST NAME (X017ARLNAME)].]

[INSTR: ARE YOU INTERVIEWING [R FNAME], OR DOING A PROXY FOR [R FName]?]

[INSTR: IF YOU HAVE THE WRONG R, SUSPEND THIS CASE AND SELECT THE CORRECT LINE.]

This survey is intended for [R FNAME] [LAST NAME].

Are you [R FNAME]?

1. CORRECT R.....GO TO A007 BRANCHPOINT

1. YES.....GO TO A007 BRANCHPOINT
5. NO..... GO TO A006 Abort Screen

[EMPTY]..... GO TO A006 Abort Screen

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

NOTE: IF THE PERSON BEING INTERVIEWED IS NOT THE CORRECT RESPONDENT, THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1. Abort Screens) FOR ABORT SCREEN TEXT.

A007 BRANCHPOINT: IF THIS IS A CAWI IW, ASSIGN 1 and GO TO A002 BRANCHPOINT

ELSE IF YEAR OF DEATH EMPTY (Z131= EMPTY) and TYPE OF POST-EXIT EMPTY (Z145= EMPTY) OR YEAR OF DEATH EMPTY (Z131= EMPTY) and TYPE OF POST-EXIT (Z145=1), CONTINUE

ELSE IF YEAR OF DEATH EMPTY (Z131=EMPTY) AND TYPE OF POST-EXIT (Z145 >1) THEN ASSIGN A007=5.

ELSE IF YEAR OF DEATH IS NOT EMPTY THEN ASSIGN A007=5

ELSE, GO TO A002

#@AA(4/21/22):
added condition;
#49692.
#@ AA (1/11/22):
added condition;
#49305

A007

~~IF THIS IS A NEW INTERVIEW HH (X024 NOT 1) or {REINTERVIEW HH (X024=1) and LANGUAGE IS SET FOR CORE IW (ActiveLanguage=CORE) (R WAS NOT PREVIOUSLY CLASSIFIED AS DECEASED)}:~~

[INSTR: IS [R FNAME] LIVING?]

~~IF THIS IS A REINTERVIEW HH (X024=1) and LANGUAGE IS ALREADY SET FOR EXIT IW (ActiveLanguage=EXIT) (R WAS PREVIOUSLY CLASSIFIED AS DECEASED):~~

~~[INSTR: IS [R FIRST NAME] LIVING?]~~

CORE:

1. YES
5. NO

#@ MM
(9/13/22) B&A
Only: Removed
Note and
dropped Exit Text
as there no
alternate
wording.

#@ MM
(9/13/22) B&A
Only: Removed
Note and
dropped Exit Text
as there no
alternate
wording.

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

~~EXIT:~~

~~1. YES~~

~~5. NO~~

NOTE: {CORE and EXIT} FOR A REINTERVIEW HOUSEHOLD (HH) THE INTERVIEW WILL THEN PROCEED EITHER AS A CORE INTERVIEW OR AS AN EXIT INTERVIEW. WHEN THE RESPONDENT (R) IS REPORTED HERE AS NOT LIVING AND WAS PRELOADED AS COUPLED, THEN THE HOUSEHOLD BECOMES CLASSIFIED AS SPLIT AND INTERVIEWS FOR THE TWO RESPONDENTS PROCEED INDEPENDENTLY.

FOR A NEW INTERVIEW HH THE INTERVIEW WILL PROCEED AS A CORE INTERVIEW, BUT ONLY IF THE RESPONDENT IS REPORTED HERE AS LIVING. IF THE RESPONDENT IN A NEW HH IS NOT LIVING, THE INTERVIEWER WILL SUSPEND THE CASE AND IT WILL BE TERMINATED FOR THIS RESPONDENT.

A002 BRANCHPOINT: IF THIS IS A CAWI IW, ASSIGN 1 and GO TO A008
BRANCHPOINT

A002

[INSTR: IS THE RESPONDENT OR THE PROXY FOR THE RESPONDENT WILLING AND ABLE TO DO THE INTERVIEW?]

[INSTR: CHOOSING 'YES' WILL CONTINUE THIS INTERVIEW.]

[INSTR: IS THE PROXY FOR THE RESPONDENT WILLING AND ABLE TO DO THE INTERVIEW?]

[INSTR: CHOOSING 'YES' WILL CONTINUE THIS INTERVIEW.]

1. YES

~~NOTE: IF THE PERSON BEING INTERVIEWED IS NOT THE CORRECT RESPONDENT, THE INTERVIEWER IS GIVEN THE FOLLOWING INSTRUCTION:
"SUSPEND THIS CASE. GO BACK TO SURVEYTRAK"~~

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

#@ MM
(9/13/2022) B&A
Only:
Commented out
suspend note.

A008/A188 BRANCHPOINT: IF THIS IS A CAWI INTERVIEW AND WE KNOW R'S GENDER (X060 NOT EMPTY),, ASSIGN PRELOADED VALUE(x060) *and* GO TO A155 BRANCHPOINT

ELSE IF CAPI **AND IF** WE KNOW R's GENDER FROM PRELOAD (X060 NOT EMPTY), ASSIGN THAT GENDER TO A008/A188 AND GO TO **A009 A155**

#@MM(9/16/22)
B&A Only: Added
"and" to make
second condition
more
understandable
#@MM(1/4/23)
B&A Only:
Removed
reference to
A188 per #50148
#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148
#@MM(1/4/23)
B&A Only:
Removed
reference to
A188 per #50148

A008/A188

[INSTR: PLEASE SELECT SEX.]

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

[INSTR: WAS [RESPONDENT NAME] MALE OR FEMALE?]

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

1. MALE
2. FEMALE

#@ MM
(9/13/2022) B&A
Only: Dropped
old note

~~NOTE: SELECTED GENDER IS THEN ASSIGNED TO X060. IF RESPONDENT IS COUPLED (X065={1 or 3}) AND WE DO NOT KNOW GENDER FOR THE OTHER RESPONDENT IN THE COUPLE (X060[R2]=EMPTY), THE OPPOSITE GENDER IS ASSIGNED TO X060 FOR THAT OTHER RESPONDENT.~~

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

1. MALE
2. FEMALE

[EMPTY]..... GO TO A008 Abort Screen

NOTE: IF THIS IS A CAWI INTERVIEW, AND GENDER IS MISSING, THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1) FOR ABORT SCREEN TEXT.

A155 BRANCHPOINT: IF THIS IS A CAWI IW, ASSIGN 1 *and* GO TO A010
BRANCHPOINT

A155/A0
09

#@MM (1/4/23)
B&A Only:
removed
reference to
A009 per dev
#50149

[INSTR: DESIGNATE TYPE OF INTERVIEW:]

[INSTR: ENTER CODE 4 IF LIVING PROXY IS SPOUSE OR PARTNER BUT DOES NOT
LIVE WITH R, E.G., R OR SPOUSE OR PARTNER LIVES IN A NURSING HOME.]

[INSTR: DESIGNATE TYPE OF INTERVIEW:]

CORE

1. SELF.....GO TO A012
2. PROXY, SPOUSE OR PARTNER IS REPORTER, AND LIVING IN SAME HOUSEHOLD
3. PROXY, NON-SPOUSE OR NON-PARTNER IS REPORTER
4. PROXY, SPOUSE OR PARTNER IS REPORTER, BUT DOES NOT LIVE IN SAME
HOUSEHOLD

EXIT

2. PROXY IS SURVIVING SPOUSE OR PARTNER.....GO TO A010 Branchpoint
3. PROXY IS NON-SPOUSE or NON-PARTNER.....GO TO A010 Branchpoint

**NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR
'REFUSE' ARE NOT ACCEPTABLE RESPONSES.**

~~NOTE: IF THIS IS THE FIRST R (SCVXR1_R2=1) and NOT A SELF INTERVIEW
(A009/A155 NOT 1), THIS MESSAGE WILL APPEAR TO THE INTERVIEWER:
You are starting to conduct a proxy interview for the 1st R. If this is a coupled
household and you know that the other member will do a self interview, you must
do that self interview first. Otherwise, continue with the proxy interview.~~

#@ MM
(9/13/22) B&A
Only: Removed
Defunct Note

~~THE IWER WILL SUSPEND AND ATTEMPT TO INTERVIEW THE OTHER RESPONDENT
FIRST—I.E., MAKE THAT OTHER RESPONDENT THE FIRST R. HOWEVER, THE IWER
WILL CONTINUE THIS INTERVIEW WITH A PROXY IF S/HE KNOWS FOR CERTAIN
EITHER THAT THE R IS SINGLE OR THAT THE OTHER RESPONDENT WILL ALSO
REQUIRE A PROXY.~~

A215 BRANCHPOINT: IF THIS IS AN EXIT IW, GO TO A010 BRANCHPOINT

#@ AA (11/8/21):
Added A215 BP
to skip to A215
for exit; #49125

A215

[INSTR: HAVE YOU RECEIVED APPROVAL FROM ~~YOUR TL AND~~ THE RESPONDENT TO COMPLETE THIS INTERVIEW WITH THE LIVING PROXY?]

#@ AA (11/8/21):
returned A215
but revised text
to remove
permission from
TL; #49125

[INSTR: IF YOU HAVE NOT OBTAINED PERMISSION, SUSPEND THIS CASE AND OBTAIN APPROVAL. ONCE YOU HAVE APPROVAL, YOU MUST RESTART THE CASE.]

#@ AA (11/1/21):
Drop A215;
#49125
#@ SS (6/22/21):
Remove
instruction DEV#
48598

~~[INSTR: HAVE YOU RECEIVED APPROVAL FROM YOUR TL OR PC TO COMPLETE THIS INTERVIEW WITH THE LIVING PROXY?]~~

~~[INSTR: IF YOU HAVE NOT OBTAINED PERMISSION, SUSPEND THIS CASE AND OBTAIN APPROVAL. ONCE YOU HAVE APPROVAL, YOU MUST RESTART THE CASE.]~~

- 1. YES
- 5. NO

Information about proxy, if any (A010-A105)

A010 BRANCHPOINT: IF THIS IS A CAWI IW, GO TO A012 BRANCHPOINT

ELSE IF THIS IS A NEW INTERVIEW R (Z076 NOT 1) or R's LAST WAVE IW WAS A SELF IW (Z095=1) , GO TO A103 BRANCHPOINT (AFTER A010)

A010

{CORE AND EXIT}

IF NAME OR RELATIONSHIP OF PREVIOUS WAVE PROXY IS UNKNOWN ({Z094 IS EMPTY} or {Z096 {=32 or IS EMPTY}} or {Z095=3}):

[INSTR: THE NAME OR RELATIONSHIP OF THE PROXY AT THE PREVIOUS INTERVIEW IS NOT RECORDED. UNLESS YOU LEARN FROM THE CURRENT WAVE PROXY THAT (S/HE) ALSO DID THE PREVIOUS INTERVIEW, ENTER CODE 3 BELOW.]

OTHERWISE:

[INSTR: PREVIOUS WAVE PROXY WAS [PROXY NAME (Z094)] [PROXY RELATIONSHIP TO R (Z096)].]

FOR ALL Rs {CORE AND EXIT}:

[INSTR: IS CURRENT WAVE PROXY THE SAME PERSON OR SOMEONE ELSE?]

1. SAME PERSON AS IN PRIOR WAVE
2. DIFFERENT/NEW PERSON
3. NOT KNOWN

NOTE: THIS QUESTION MUST BE ANSWERED. DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

A103 BRANCHPOINT: IF SPOUSE/PARTNER IS PROXY REPORTER (A009 A155=2), ASSIGN "2. SPOUSE/PARTNER" TO A103 *and* ASSIGN SPOUSE'S/PARTNER'S NAME TO A105 *and* GO TO A219

ELSE, IF WE KNOW THE {NAME and RELATIONSHIP} OF PREVIOUS WAVE PROXY ({Z094 NOT EMPTY} *and* {Z096 {NOT 32 and NOT EMPTY}}) *and* PROXY IS SAME PERSON AS AT R's LAST INTERVIEW (A010=1), ASSIGN SAME NAME TO A105 (per Z094) *and* SAME RELATIONSHIP TO A103 (per Z096) *and* GO TO A219

#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

A103

[INSTR: DESIGNATE THE PROXY REPORTER'S RELATIONSHIP TO [R FNAME].]

- RELATION MAIN CODE
2. SPOUSE/PARTNER
 3. SON
 4. STEPSON OR SON OF PARTNER
 5. SPOUSE/PARTNER OF DAUGHTER
 6. DAUGHTER
 7. STEPDAUGHTER OR DAUGHTER OF PARTNER
 8. SPOUSE/PARTNER OF SON
 9. GRANDCHILD OF R OR SP/P
 15. BROTHER
 17. SISTER
 19. OTHER RELATIVE
 20. OTHER INDIVIDUAL
 23. PAID HELPER
 24. PROFESSIONAL
 33. SP/P OF GRANDCHILD
 98. DK ~~{HIDE}~~ ~~{HIDE}~~
 99. RF ~~{HIDE}~~

A180/A181 BRANCHPOINT: IF PROXY IS NOT A TYPE OF CHILD (A103 {NOT 3 and NOT 4 and NOT 5 and NOT 6 and NOT 7 and NOT 8}, GO TO A105 BRANCHPOINT

ELSE, IF R HAS ONLY ONE PRELOADED {CHILD OR HIS/HER SPOUSE/PARTNER} (A101=1), ASSIGN THAT CHILD TO ~~A180/A181~~ A180_A181 and GO TO A105 BRANCHPOINT

ELSE, IF PROXY IS A CHILD (A103={3 or 4 or 5 or 6 or 7 or 8}) and R HAS NO PRELOADED CHILDREN (A101=0), GO TO A105

#@MM (1/4/23)
B&A Only:
Changed
A180/A181 to
A180_A181 per
#50150

~~A180/A181~~
~~81~~
A180_A181
81

#@MM (1/4/23)
B&A Only:
Changed
A180/A181 to
A180_A181 per
#50150

Which child?

CHILD & SPOUSE/PARTNER NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD NAME(S) & SPOUSE/PARTNER NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

97. NOT ON LIST

DK ~~{HIDE}~~

RF ~~{HIDE}~~

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN AND THEIR SPOUSES/PARTNERS (IF ANY), LISTED FROM THE PREVIOUS INTERVIEW, ARE DISPLAYED AS SEPARATE INDIVIDUALS.

NOTE: THE TYPES OF CHILDREN THAT ARE INCLUDED ARE THOSE CLASSIFIED AS SON, STEPSON, SPOUSE/PARTNER OF SON, DAUGHTER, STEPDAUGHTER, SPOUSE/PARTNER OF DAUGHTER, UNKNOWN CHILD, AND UNKNOWN CHILD-IN-LAW.

DECEASED CHILDREN ARE MARKED WITH AN ASTERISK (*); THOSE AWAY IN AN INSTITUTION ARE MARKED WITH A PLUS SIGN (+); AND THOSE WITH WHOM THERE HAS BEEN NO CONTACT ARE MARKED WITH A QUESTION MARK (?).

A105 BRANCHPOINT: IF PROXY IS A CHILD (A103={3 or 4 or 5 or 6 or 7 or 8}) and A CHILD WAS SELECTED AT A180/A181 (~~A180/A181~~ A180_A181 = {ONE OF 3-42}), ASSIGN THAT CHILD TO A105 and GO TO A219

ELSE, IF PROXY IS A CHILD (A103={3 or 4 or 5 or 6 or 7 or 8}) and R DID NOT GIVE CHILD'S NAME (A180/A181={DK or RF }), GO TO A219

#@MM (1/4/23)
B&A Only:
Changed
A180/A181 to
A180_A181 per
#50150

A105

[INSTR: WHAT IS THE PROXY'S NAME?]

PROXY'S NAME _____

DK ~~{HIDE}~~

RF ~~{HIDE}~~

A219

[INSTR: RECORD OR ASK IF UNCERTAIN:

(We can only conduct this interview with an adult. Can you confirm that you are age 18 or older?)]

1. YES, PROXY IS 18 OR OLDER

5. NO, PROXY IS UNDER 18

NOTE: DON'T KNOW(DK) AND REFUSE(RF) ARE NOT ACCEPTABLE RESPONSES.

End information about proxy

A011 BRANCHPOINT: IF ACTIVE LANGUAGE IS NOT 'PROXY ENGLISH'/LIVING PROXY {IF ACTIVE LANGUAGE IS {EXIT or SELF} per (A007=5 or ~~A009~~ A155=1)}, GO TO A012

#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

A164_A0

11

[INSTR: DO YOU HAVE REASON TO THINK THAT [RFNAME] WOULD HAVE DIFFICULTY COMPLETING THIS INTERVIEW BECAUSE OF COGNITIVE LIMITATIONS?]

1. NO REASON TO THINK [R FNAME] HAS ANY COGNITIVE LIMITATIONS
2. [R FNAME] MAY HAVE SOME COGNITIVE LIMITATIONS BUT COULD PROBABLY DO THE INTERVIEW
3. [R FNAME] HAS COGNITIVE LIMITATIONS THAT PREVENT HIM/HER FROM BEING INTERVIEWED

NOTE: DON'T KNOW(DK) AND REFUSE(RF) ARE NOT ACCEPTABLE RESPONSES.

Language and introductions (A012-A013)

A012 BRANCHPOINT: IF THIS IS A CAWI IW, ASSIGN 1 *and* GO TO A165_A013

A012

[INSTR: SELECT ENGLISH OR SPANISH.]

1. ENGLISH
2. SPANISH

NOTE: DON'T KNOW(DK) AND REFUSE(RF) ARE NOT ACCEPTABLE RESPONSES.

NOTE: AFTER THIS QUESTION (A012) THE LANGUAGE (ENGLISH/SPANISH) AND INTERVIEW TYPE (CORE, EXIT, PROXY) IS SET FOR THE REST OF THE INTERVIEW. SEE SECTION 2. LANGUAGE AND IW TYPE ASSIGNMENT IN APPENDIX.

A165_A0

13

IF THIS IS A CORE INTERVIEW and A REINTERVIEW R (Z076=1):

(As you know,) this study is interested in learning about important aspects of people's lives such as their health, financial and family situations. To do so, we are re-interviewing people such as yourself who have previously participated in the study.

IF THIS IS A CORE INTERVIEW and A NEW INTERVIEW R (Z076 NOT 1):

This study is interested in learning about important aspects of people's lives such as their health, financial and family situations.

READ TO ALL R'S:

This interview is completely voluntary. If we should come to any question that you don't want to answer, just let me know and I will go on to the next question. Your identity as a participant and any personally identifying information you provide will be kept confidential.

A Department of Health and Human Services Certificate of Confidentiality covers this research in order to help ensure your privacy. This certificate can help protect the researchers from being forced to release any research information that identifies you.

[INSTR: SELECT '1' TO CONTINUE.]

As you know, this study is interested in learning about important aspects of people's lives such as their health, financial and family situations. To do so, we are re-interviewing people such as yourself who have previously participated in the study. The survey should take about 90 minutes to complete.

This interview is completely voluntary. If we should come to any question that you don't want to answer, you may just select "next" to go on to the next question. Your identity as a participant and any personally identifying information you provide will be kept confidential.

A Department of Health and Human Services Certificate of Confidentiality covers this research in order to help ensure your privacy. This certificate can help protect the researchers from being forced to release any research information that identifies you.

[INSTR: PLEASE SELECT "NEXT" TO CONTINUE.]

IF THIS IS AN EXIT INTERVIEW and NOT A POST-EXIT INTERVIEW (Z145 {NOT 2 and NOT 3 and NOT 4}):

(As I mentioned,) the study appreciates the contribution that [R's FIRST NAME] made. It is important to understand what happened in the time period between the last interview and when [he/she] (died/passed away).

A major focus is on [R's FIRST NAME]'s health and health-related costs, and on the disposition of [his/her] assets. We will also update general information about [R's FIRST NAME].

IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}):

(As you may know, R's FIRST NAME was a part of the Health and Retirement Study, an important study about issues of aging.) About two years ago, after R's FIRST NAME (died/passed away), we spoke with [NAME OF EXIT INTERVIEW PROXY] about R's FIRST NAME's death and the health conditions surrounding [his/her] death. At that time, final settlement of the estate had not taken place, and we would like to ask a few questions now about the final estate settlement.

READ TO ALL R'S:

This interview is completely voluntary. If we should come to any question that you don't want to answer, just let me know and I will go on to the next question. Your identity as a participant and any personally identifying information you provide will be kept confidential.

A Department of Health and Human Services Certificate of Confidentiality covers this research in order to help ensure [R's First NAME]'s privacy. This certificate can help protect the researchers from being forced to release any research information that identifies [R First Name].

[INSTR: SELECT '1' TO CONTINUE.]

1. CONTINUE

~~NOTE: '1. CONTINUE' IS ONLY ACCEPTABLE RESPONSE.~~

#@ MM
(9/13/22) B&A
Only: Removed
Note

A013 BRANCHPOINT: IF THIS IS A CAWI INTERVIEW, ASSIGN 5 and GO TO A121 BRANCHPOINT

A013

This interview may be recorded so that my supervisor can evaluate my performance.

[INSTR: PRESS '1' OR '5' AS APPROPRIATE TO CONFIRM THAT YOU HAVE READ THE ABOVE STATEMENT TO THE RESPONDENT.]

This interview may be recorded so that my supervisor can evaluate my performance.

[INSTR: PRESS 1 OR 5 AS APPROPRIATE TO CONFIRM THAT YOU HAVE READ THE ABOVE STATEMENT TO THE RESPONDENT.]

1. CONTINUE

5. CONTINUE WITHOUT RECORDING

NOTE: DON'T KNOW(DK) AND REFUSE(RF) ARE NOT ACCEPTABLE RESPONSES.

Deceased respondent questions (A121-A134)

A121 BRANCHPOINT: IF THIS IS A CORE *or* CAWI INTERVIEW, GO TO X004_1 BRANCHPOINT (AFTER A134)

ELSE, IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}) and YEAR OF DEATH IS KNOWN (Z131 NOT EMPTY), GO TO CHILD ROSTER BRANCHPOINT

ELSE, IF THIS IS AN EXIT INTERVIEW and YEAR OF DEATH IS ALREADY KNOWN (Z131 NOT EMPTY), GO TO X004 (Tag#=A014) BRANCHPOINT

A121

What was the date on which [RESPONDENT NAME] died?
MONTH

A122

DAY

DK [HIDE]

RF [HIDE]

A123

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

A124 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO CHILD ROSTER BRANCHPOINT

A124

At the time of death, was [he/she] in a hospital, in a nursing home, at home, in a hospice facility, or what?

#@ DM3 MM
5/9/2022
updated
definition #49683
#@ DM3 MM
5/9/2022 entered
new QXQ #49726

DEFINITION: By "nursing home or other long-term health care facility" we mean a facility that provides all of the following services for **some or all of its residents**: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

[INSTR: IF R WAS RECEIVING HOSPICE CARE AT HOME AT THE TIME OF DEATH
SELECT '3. AT HOME'.]

1. IN HOSPITAL
 2. IN NURSING HOME
 3. AT HOME
 4. IN HOSPICE FACILITY
 7. OTHER (SPECIFY) A125S _____
- DK
RF

A126

In what state and county did [he/she] die?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

STATE _____

97. OTHER COUNTRY A128 _____

DK.....GO TO A129

RF.....GO TO A129

*NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING
WASHINGTON, D.C., AND PUERTO RICO.*

A127

(In what state and county did [he/she] die?)

COUNTY _____

DK

RF

A129

In what state and county was [his/her] death certificate filed?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

STATE _____

97. OTHER COUNTRY A159 _____

DK.....GO TO A131

RF.....GO TO A131

NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.

A130

(In what state and county was [his/her] death certificate filed?)

COUNTY _____

DK

RF

A131

(Was the death expected at about the time it occurred, or was it unexpected?)

1. EXPECTED

2. UNEXPECT

7. OTHER (SPECIFY) A132 _____

DK

RF

A133

(What was the major illness that led to [his/her] death?)

CAUSE OF DEATH _____

DK

RF

A256

(Did [R FNAME] have COVID-19 at the time [he/she] died?)

[INSTR: IF THE PROXY PREVIOUSLY REPORTED THAT R HAD COVID-19 OR CORONAVIRUS AT THE TIME OF DEATH, ENTER 1. YES AND DO NOT ASK.]

1. YES

5. NO

DK

RF

A134

(About how long was it between the start of the final illness and the death: was it one or two hours, less than a day, less than a week, less than a month, less than a year, or was it more than a year?)

#@AA(12/9/21):
added a new exit
question; #49402

1. ONE OR TWO HOURS (OR NO WARNING)
 2. LESS THAN A DAY
 3. LESS THAN A WEEK
 4. LESS THAN A MONTH
 5. LESS THAN A YEAR
 6. MORE THAN A YEAR
- DK
- RF

End deceased respondent questions

Birthdate and age of respondent

X004_1 BRANCHPOINT: IF THIS IS A REINTERVIEW R (Z076=1) and WE KNOW R's BIRTH YEAR FROM A PRIOR IW (X067 NOT EMPTY) and IT WAS PROVIDED BY THIS R (Z079 NOT 001), GO TO A017 BRANCHPOINT

~~NOTE: THE FOLLOWING THREE QUESTIONS [X004, X005 AND X067] ARE PRELOAD VARIABLES FOR A RESPONDENT'S AGE THAT ARE UPDATED IF NEW INFORMATION IS PROVIDED FROM THESE QUESTIONS, BELOW. FOR NEW COHORTS WE HAVE ONLY THE YEAR OF BIRTH FROM THE SCREENER.~~

#@MM (9/15/22)
B&A Only:
Removed note

X004_1

In what month, day and year were you born?

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

In what month, day and year were you born?

In what month, day and year was [R NAME] born?

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

MONTH

X005_1

DAY

DK [HIDE]

RF [HIDE]

X067_1

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

#@ MM
(9/15/22) B&A
only: Dropped
Note

~~NOTE: X067 IS PRELOADED WITH THE BIRTH YEAR GIVEN AT A PRIOR IW FOR REINTERVIEW RS OR AT THE SCREENER FOR NEW INTERVIEW RS. X067 IS UPDATED WHEN THE BIRTH YEAR IS COLLECTED IN THIS IW. IF THE R SAID DK/RF HERE, THEN THE PRELOADED BIRTH YEAR IS RETAINED.~~

A216 BRANCHPOINT: ASK IF R'S AGE IS UNDER 18 YEARS (X067_1 < 2004).

ELSE: GO TO A017 BRANCHPOINT

#@AA(9/27/22)B
&A_only; moved
A216 and a217
above a017 and
changed BP to
used ask rules.

A216

Just to confirm, can you please tell me your age?

AGE_____

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

A217 BRANCHPOINT: ASK IF R'S AGE IS UNDER 18 YEARS (A216 < 18)

ELSE: GO TO A017 BRANCHPOINT

A217

Thank you for providing this information. We can only conduct this interview with an adult.

[INSTR: SELECT "1" TO MARK THIS CASE AS INELIGIBLE.]

1. UNDERAGED R - CASE INELIGIBLE.....GO TO END OF IW

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

A017 BRANCHPOINT: IF THIS IS A CAWI IW OR WE KNOW R's BIRTH YEAR {FROM {PRIOR IW or SCREENER} (X067 NOT EMPTY) or {FROM THIS IW (X067 {NOT DK and NOT RF})}}, GO TO ~~A018/A019 Branchpoint~~ A023 BRANCHPOINT

A017

(RESPONDENT)

An important part of this study is understanding how people make decisions during different stages of life. In order to ask the correct sequence of questions for your interview, we need to have a general age range.

Are you 65 years of age or older?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESIMATE OF WHETHER R IS 65 YEARS OF AGE OR OLDER. USE CODES '4' OR '5' TO RECORD YOUR ESTIMATE.]

(RESPONDENT)

An important part of this study is understanding how people make decisions during different stages of life. In order to ask the correct sequence of questions for your interview, we need to have a general age range.

Are you 65 years of age or older?

An important part of this study is understanding how people make decisions during different stages of life. In order to ask the correct sequence of questions for your interview, we need to have a general age range.

Was R's FIRST NAME 65 years of age or older at the time [he/she] (died/passed away)?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESTIMATE OF WHETHER R IS 65 YEARS OF AGE OR OLDER. USE CODES '4' OR '5' TO RECORD YOUR ESTIMATE.]

1. AGE OR BIRTH YEAR REPORTED
2. YES, 65 OR OVER
3. NO, UNDER 65
4. IWER ESTIMATE: AGE 65 OR OVER
5. IWER ESTIMATE: AGE UNDER 65

NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES. IF THE R GIVES AN AGE (A017=1), THE IWER CALCULATES THE YEAR, ATTEMPTING TO VERIFY IT WITH THE R, AND THEN JUMPS BACK TO X067 WHERE THAT YEAR IS ENTERED.

2. YES, 65 OR OVER
3. NO, UNDER 65

~~CAWI prompt: "Your responses are important to us. Please try to answer all question."~~

#@ MM
(9/13/22) B&A
Only: This signal
was dropped in
2018

NOTE: SEE APPENDIX (SECTION 3. Birthdate and Age of Respondent Calculation and Assignments) FOR MORE DETAILS ON THE A018/A019 AGE IMPUTATION.

A216 Branchpoint:

~~IF R'S AGE IS UNDER 18 (X067 < 18) — CONTINUE~~

~~ELSE, IF THIS IS A MINORITY OVERSAMPLE CASE {X532_Minority2022 = 1}, and R1's UPDATED BIRTH YEAR IS < 1971. GO TO A023 BRANCHPOINT~~

~~ELSE, IF THIS IS A MINORITY OVERSAMPLE CASE {X532_Minority2022 = 1}, and coupled from screener and R2's PW or UPDATED BIRTH YEAR IS < 1971. GO TO A023 BRANCHPOINT~~

~~ELSE, IF THIS IS A REINTERVIEW R (Z076=1) — GO TO A023 BRANCHPOINT~~

~~ELSE, IF COUPLED FROM SCREENER AND {R1's UPDATED BIRTH YEAR IS < 1966, GO TO A158}~~

~~ELSE, IF COUPLED FROM SCREENER AND {R1'S UPDATED BIRTH YEAR IS 1966-1971 OR > 1971}, GO TO A023~~

~~ELSE, IF UNCOUPLED FROM SCREENER (REGARDLESS OF COUPLENES STATUS AT TIME OF MAIN IW) AND R1'S UPDATED BIRTH YEAR IS 1966-1971 GO TO A023 BRANCHPOINT.~~

~~ELSE: GO TO A158~~

#@AA(9/27/22)B
&A_ONLY; moved
A216 BP above
A017;

#@AA(1/13/22):
updated minority
condition;#49423

#@ SS (8/17/21)
Added A216 BP
for NC wave.

#@ SS (8/17/21)
Added condition
for minority
oversample.
DEV#48769

A216

~~Just to confirm, can you please tell me your age?~~

~~AGE _____~~

~~NOTE: THE R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES~~

A217 Branchpoint: ~~IF THIS IS A REINTERVIEW HH (X024=1) AND R'S AGE IS 18 OR OLDER (X067 >= 18) — GO TO A158~~

~~ELSE, IF R's AGE IS 18 OR OLDER (X067 >= 18) — GO TO A158~~

A217

~~Thank you for providing this information. — We can only conduct this interview with an adult.—~~

~~[INSTR: SELECT "1" TO MARK THIS CASE AS INELIGIBLE.]~~

1. UNDERAGED R—CASE INELIGIBLE.....GO TO END OF IW

A158 BRANCHPOINT: IF THIS IS A REINTERVIEW R (Z076=1) - GO TO A023 BRANCHPOINT

ELSE IF THIS IS A MINORITY OVERSAMPLE CASE {X532= 1}, and R1's UPDATED BIRTH YEAR IS BEFORE 1971 (X067 < 1971) - GO TO A023 BRANCHPOINT

ELSE IF THIS IS A MINORITY OVERSAMPLE CASE {X532= 1}, and coupled from screener and R2's PW or UPDATED BIRTH YEAR IS < 1971. GO TO A023 BRANCHPOINT

ELSE IF COUPLED FROM SCREENER AND {R1'S UPDATED BIRTH YEAR IS 1966-1971 OR > 1971}, GO TO A023 BRANCHPOINT

ELSE IF UNCOUPLED FROM SCREENER (REGARDLESS OF COUPLENESS STATUS AT TIME OF MAIN IW) AND R1'S UPDATED BIRTH YEAR IS 1966-1971 GO TO A023 BRANCHPOINT.

#@AA(9/27/22)
B&A_Only; added
new BP to
simplify A216 BP;

A158

Based on this updated information, we do not need to interview you at this time. However, we may contact you again in several years. We appreciate your assistance.

[INSTR: SELECT "1" TO MARK THIS CASE AS INELIGIBLE.]

#@ AA
(8/3/2021):
Adding New
Cohort
Termination
Screen; #48473

1. NEW COHORT INELIGIBLE - GO TO END OF IW

End Birthdate and Age of Respondent

Marital Status Information, Coupled PW (A020-A025)

~~A020/A166_A020~~ A023 BRANCHPOINT: IF THIS IS THE SECOND R (SCVXR1_R2=2), GO TO ~~A167/A167_A028~~

ELSE, IF {THIS IS A REINTERVIEW HH (X024=1) and R WAS NOT COUPLED AT HH's LAST IW (Preload_X065 {NOT 1 and NOT 3})} or {THIS IS A NEW INTERVIEW HH (X024 NOT 1) and R WAS NOT REPORTED AS COUPLED IN THE SCREENER (X065 {NOT 1 and NOT 3})}, GO TO ~~A167/A167_A028~~

#@AA(9/27/22)B
&A_ONLY: fixed
go to fieldname;
#@ AA (7/28/21):
moved up the
A166_A020 BP
since A023 is
asked first;
#48588

A023

IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW FOR LAST-WAVE FIRST R (HHX035_1stRlwYr_V = EMPTY):

(We need to update our records. They show that you [were married/were living with a partner as if married].)

#@ SS (10/1/21):
Added iwer
instruction
DEV#48887

OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):

(First we need to update our records. As of [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] they show that you [were married/were living with a partner as if married].)

#@ AA (8/4/21):
moved intro text
from A166_A020
to A023 since
A023 is asked
first now; #48775

IF THIS IS A NEW INTERVIEW HH (X024 NOT 1):

(We need to be sure our records are accurate. They show that you [were married/were living with a partner as if married].)

#@ SS (6/22/21):
Moved A023 in
the asked order
to before
A166_A020
DEV#48588

ASK ALL Rs:

(Is [R's LAST IW/SCREENER SPOUSE's/PARTNER's FIRST NAME] still alive?)

[INSTR: ONCE YOU ANSWER THIS QUESTION, YOU CAN'T BACK UP TO CHANGE IT. IF YOU ENTER '5' THAT THE PREVIOUS WAVE SPOUSE OR PARTNER IS NOT ALIVE AND GO FORWARD, BLAISE WILL ASSIGN NO TO A166 'STILL COUPLED WITH PREVIOUS WAVE SPOUSE/PARTNER' AND THIS WILL SPLIT THE HOUSEHOLD. IF YOU MARKED PREVIOUS WAVE SPOUSE/PARTNER NOT ALIVE IN ERROR, SUSPEND THIS CASE AND START OVER.]

#@ SS (6/22/21):
Adding
instruction
DEV#48128

[INSTR: DK/RF NOT ACCEPTED. IF R DOESN'T KNOW OR DOESN'T WANT TO ANSWER THIS QUESTION, SELECT '1. YES'.]

IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW FOR LAST-WAVE FIRST R (HHX035_1stRlwYr_V = EMPTY):

We need to update our records. They show that you [were married/were living with a partner as if married].

OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):

First we need to update our records. As of [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] they show that you [were married/were living with a partner as if married].

ASK ALL Rs:

Is [R's LAST IW/SCREENER] SPOUSE's/PARTNER's FIRST NAME] still alive?

IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW FOR LAST-WAVE FIRST R (HHX035_1stRIwYr_V = EMPTY):

(We need to update our records. They show that [R's FIRST NAME] [was married/was living with a partner as if married].)

OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):

(First we need to update our records. As of [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] they show that [R's FIRST NAME] [was married/was living with a partner as if married].)

ASK ALL Rs:

Was [R's LAST IW SPOUSE's/PARTNER's FIRST NAME] ~~still~~ alive at ~~that~~ the time [R FNAME] (died/passed away?

- 1. YES.....~~GO TO A024~~
- 5. NO

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

- ~~1. YES.....GO TO A024~~
- ~~5. NO~~
- ~~[EMPTY].....GO TO A024~~

~~NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.~~
~~CAWI prompt: "Your responses are important to us. Please try to answer each question."~~

#@ AA (7/28/21):
updated exit text
since A023 is now
asked before
A166_A020;
#48748

#@ AA (7/28/21)
B&A_ONLY:
removed the old
A023 skip;
#48588

#@ MM
(9/23/22) B&A
ONLY: Dropped
CAWI codeframe
given that it is the
same as CAPI

#@ MM
(9/15/22) B&A
only: Moved
CAWI prompt to
Checks_Signals
tab.

A020/A166_A020 BRANCHPOINT: ~~IF THIS IS THE SECOND R (SCVXR1_R2=2), GO TO 167/A167_A028~~

~~IF {THIS IS A REINTERVIEW HH (X024=1) and R WAS NOT COUPLED AT HH's LAST IW (Preload_X065 {NOT 1 and NOT 3})} or {THIS IS A NEW INTERVIEW HH (X024 NOT 1) and R WAS NOT REPORTED AS COUPLED IN THE SCREENER (X065 {NOT 1 and NOT 3})}, GO TO 167/A167_A028~~

~~IF R'S LAST IW SPOUSE/PARTNER PASSED AWAY (A023=5) THEN ASSIGN 'NO' TO SAME SPOUSE/PARTNER AS PREVIOUS WAVE (A166_A020 = 5) AND GO TO A202-A255_A020 BRANCHPOINT~~

#@ AA (8/4/21):
updated skip to
go to A255_A020
BP instead of
A202 BP; #48588
#@ AA (7/28/21):
updated BP to
skip if A023=5;
#48588

A166_AO
20

~~IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW FOR LAST WAVE FIRST R (HHX035_1stRwYr_V = EMPTY):
{We need to update our records. They show that you [were married/were living with a partner as if married].}~~

~~OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):
{First we need to update our records. As of [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST WAVE'S 1ST R/LAST IW YEAR FOR LAST WAVE'S 1ST R] they show that you [were married/were living with a partner as if married].}~~

~~IF THIS IS A NEW INTERVIEW HH (X024 NOT 1):
{We need to be sure our records are accurate. They show that you [were married/were living with a partner as if married].}~~

ASK ALL Rs:

(Is R's [LAST IW/SCREENER] SPOUSE's/PARTNER's FIRST NAME still your [husband/wife/ partner]?)

~~[INSTR: IF R'S LAST IW SPOUSE/PARTNER IS DECEASED, ENTER '5'.]~~

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

#@ AA (7/28/21):
Removed iwer
instr since we
moved A023;
#48749

~~IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW-
FOR LAST WAVE FIRST R (HHX035_1stRlwYr_V = EMPTY):
We need to update our records. They show that you [were married/were living
with a partner as if married].-~~

~~OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):
First we need to update our records. As of [LAST IW MONTH (per X034), YEAR (per
X035) FOR LAST WAVE'S 1ST R/LAST IW YEAR FOR LAST WAVE'S 1ST R] they show
that you [were married/were living with a partner as if married].~~

ASK ALL Rs:

Is [R's LAST IW SPOUSE/PARTNER FIRST NAME] still your
[husband/wife/partner/spouse]?

~~INSTR: IF [R's LAST IW SPOUSE/PARTNER NAME] IS DECEASED, SELECT 'NO'.~~

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE
YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

NOTE: FOR CAWI ONLY THIS IWER INSTR WILL BE RED.

~~IF THIS IS A REINTERVIEW HH (X024=1) and WE DON'T KNOW YEAR OF LAST IW-
FOR LAST WAVE FIRST R (HHX035_1stRlwYr_V = EMPTY):
(We need to update our records. They show that [R's FIRST NAME] [was-
married/was living with a partner as if married].)~~

~~OTHERWISE, IF THIS IS A REINTERVIEW HH (X024=1):
(First we need to update our records. As of [LAST IW MONTH (per X034), YEAR
(per X035) FOR LAST WAVE'S 1ST R/LAST IW YEAR FOR LAST WAVE'S 1ST R] they
show that [R's FIRST NAME] [was married/was living with a partner as if married].)~~

ASK ALL Rs:

(Was [R's LAST IW SPOUSE's/PARTNER's FIRST NAME] still [his/her]
[husband/wife/partner] at the time [he/she] (died/passing away)?)

~~[INSTR: IF R'S LAST IW SPOUSE/PARTNER IS DECEASED, ENTER '5'.]~~

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE
YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

1. YES
5. NO
3. PARTNER IS NOW A SPOUSE*

* ONLY DISPLAYED IF R WAS PARTNERED LAST WAVE

~~CAWI PROMPT: "YOUR RESPONSES ARE IMPORTANT TO US. PLEASE TRY TO ANSWER ALL QUESTIONS."~~

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

#@ MM
(9/15/22) B&A
only: Moved
CAWI prompt to
Checks_Signals
tab.

EXIT:

1. YES, AND SP/PARTNER WAS LIVING WHEN R (DIED/PASSED AWAY).....GO TO ~~A023~~ A202 BRANCHPOINT

5. NO.....GO TO ~~A023~~ A202 BRANCHPOINT

3. THAT PARTNER BECAME R'S SPOUSE AND WAS LIVING WHEN R (DIED/PASSED AWAY).....GO TO ~~A023~~ A202 BRANCHPOINT*

#@ AA (7/28/21):
revised exit code
skip at
A166_A020 ;
#48588

* ONLY DISPLAYED IF R WAS PARTNERED LAST WAVE

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

NOTE: IF THE RESPONDENT DOES NOT PROVIDE COUPLENESS STATUS(A66_A020 = EMPTY), THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1. Abort Screens) FOR ABORT SCREEN TEXT.

A255_A020 CONFIRMATION BRANCHPOINT: Ask IF CAWI INTERVIEW

ELSE, IF CAPI, ASSIGN A255_A020 = 1 AND GO TO ~~A023~~ A202 BRANCHPOINT

#@MM(9/20/22)
B&A ONLY:
Changed BP to
later BP

A255_A0
20Confir
mation

Just to confirm, you ~~indicated that you~~ are [no longer [married to/partnered with]/[still [married to/partnered with] [R's spouse/partner FName]

Is that correct?

#@ AA 8/4/21:
updated qtext;
#48750

1. YES..... GO TO A202 BRANCHPOINT

5. NO.....GO TO A255_A020 Abort Screen

NOTE: IF THERE IS A DISCREPANCY WITH THE RESPONDENT'S COUPLENESS STATUS (A255_A020 = 5), THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1. Abort Screens) FOR ABORT SCREEN TEXT.

~~A023 BRANCHPOINT: IF R HAS SAME SPOUSE/PARTNER AS {AT HH'S LAST IW OR AS REPORTED IN THE SCREENER} (A020={1 or 3 or empty}) and SPOUSE/PARTNER IS PROXY REPORTER (A009=2) or R HAS SAME SPOUSE/PARTNER AS {AT HH'S LAST IW OR AS REPORTED IN THE SCREENER} (A020={1 or 3 or empty}), ASSIGN CODE 1/YES TO A023 AND GO TO A167_A028~~

~~IF NEW HH (X024 NOT 1) and COUPLED TO PERSON NAMED IN OUR SCREENER RECORDS AS R's SPOUSE/PARTNER (A020=5), GO TO A026~~

A023

~~{Is [R's LAST IW/SCREENER SPOUSE's/PARTNER's FIRST NAME] still alive?}~~

#@ SS (6/22/21):
Moved A023 in
the asked order
to before
A166_A020
DEV#48588

~~Is [R's LAST IW/SCREENER] SPOUSE's/PARTNER's FIRST NAME] still alive?
Was [R's LAST IW SPOUSE's/PARTNER's FIRST NAME] still alive at that time?~~

~~1. YES.....GO TO A024
5. NO~~

~~NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.~~

~~1. YES.....GO TO A024
5. NO
[EMPTY].....GO TO A024~~

~~NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.
CAWI prompt: "Your responses are important to us. Please try to answer each question."~~

A202 BRANCHPOINT: IF R HAS SAME SPOUSE/PARTNER AS {AT HH's LAST IW OR AS REPORTED IN THE SCREENER} (A020={1 or 3 or empty}) and SPOUSE/PARTNER IS PROXY REPORTER (A009 A155=2) or R HAS SAME SPOUSE/PARTNER AS {AT HH's LAST IW OR AS REPORTED IN THE SCREENER} (A020={1 or 3 or empty}), GO TO A167_A028

ELSE, IF NEW HH (X024 NOT 1) and COUPLED TO PERSON NAMED IN OUR SCREENER RECORDS AS R's SPOUSE/PARTNER (A020=5), GO TO A026

ELSE, IF THIS IS {A NEW COHORT INTERVIEW (X024 NOT 1) or **AN EXIT INTERVIEW**}, GO TO A024

ASK RULES:

ASK IF THIS IS A REINTERVIEW HH (X024=1) AND PW SPOUSE/PARTNER PASSED AWAY (A023=5) AND THIS IS NOT AN EXIT INTERVIEW (A007 NOT 5).

#@AA(9/27/22)
B&A_ONLY:
added ask rules;
#@ AA (7/28/21)
B&A_ONLY:
added A023 BP
condintions to
A202 BP; #48588
#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

A202

(Were you and [R's LAST IW SPOUSE's/PARTNER's FIRST NAME]
[married/partnered] when [R's LAST IW SPOUSE's/PARTNER's FIRST
NAME](died/passed away)?)

Were you and R's LAST IW SPOUSE's/PARTNER's FIRST NAME [married/partnered]
when [R's LAST IW SPOUSE's/PARTNER's FIRST NAME] passed away?

1. YES

5. NO

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

1. YES

5. NO

[Empty]

A024

IF SPOUSE/PARTNER STILL ALIVE (A023=1):

In what month and year did you and [R's LAST IW/SCREENER SPOUSE's/PARTNER's
FIRST NAME] stop living together?

#@ AA
(12/11/21):
Changed code 98
to 96;#49335

OTHERWISE:

In what month and year did [LAST IW/SCREENER SPOUSE's/PARTNER's FIRST
NAME] die?

[INSTR: IF R AND [SP/P FIRST NAME] HAVE NEVER LIVED TOGETHER SELECT 'NEVER
LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

IF SPOUSE/PARTNER STILL ALIVE (A023=1):

In what month and year did you and [R's LAST IW SPOUSE's/PARTNER's FIRST NAME] stop living together?

[INSTR: IF YOU AND [SP/P FIRST NAME] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

OTHERWISE:

In what month and year did [LAST IW SPOUSE's/PARTNER's FIRST NAME] die?

IF SPOUSE/PARTNER STILL ALIVE (A023=1)

In what month and year did [R FNAME] and [R's LAST IW/SCREENER SPOUSE's/PARTNER's FNAME] stop living together?

[INSTR: IF R AND [SP/P FIRST NAME] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

OTHERWISE:

In what month and year did [LAST IW/SCREENER SPOUSE's/PARTNER's FIRST NAME] die?

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER

~~98~~ 96. STILL LIVE TOGETHER

YEAR _____

End Marital Status Information, Coupled PW (A020-A025)

Nursing home and living arrangements (A028-A033)

[INSTR: IS R LIVING IN A NURSING HOME OR OTHER HEALTH CARE FACILITY?]

(Are you living in a nursing home or other long-term health care facility?)

DEFINITION: By "nursing home or other long-term health care facility" we mean a facility that provides all of the following services for **some or all of** its residents: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

#@ DM3 MM

5/9/2022

updated

definition #49683

#@ DM3 MM

5/9/2022

changed QXQ

#49724

This question is about your current living arrangement. Are you living in a nursing home or other long-term health care facility?

DEFINITION: By "nursing home or other long-term health care facility" we mean a facility that provides all of the following services for **some or all of** its residents: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

[INSTR: THIS QUESTION ASKS WHERE R WAS LIVING AT THE TIME OF DEATH. THIS MAY BE THE SAME OR DIFFERENT THAN THE PLACE R WAS AT THE TIME OF DEATH.]

Was [RESPONDENT NAME] living in a nursing home or other long-term health care facility at the time [he/she] (died/passed away)?

[INSTR: IF R WAS RECEIVING HOSPICE CARE AT HOME AT THE TIME OF DEATH, SELECT '5. NO'.]

DEFINITION: By "nursing home or other long-term health care facility" we mean a facility that provides all of the following services for **some or all of** its residents: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

- 1. YES
- 5. NO
- DK [HIDE]
- RF [HIDE]

NOTE: IF THIS IS A NEW HOUSEHOLD AND R LIVES IN A NURSING HOME, THIS INTERVIEW WILL BE TERMINATED.

- 1. YES - NURSING HOME OR OTHER LTC FACILITY
- 2. YES - HOSPICE
- 5. NO
- DK [HIDE]
- RF [HIDE]

NOTE: IF THIS IS A NEW HOUSEHOLD AND R LIVES IN A NURSING HOME, THIS INTERVIEW WILL BE TERMINATED.

A237 BRANCHPOINT: IF R IS IN A NURSING HOME (A167_A028=1) then ask:

ELSE: GO TO THE ~~A028-NURSING HOME ASSIGNMENT AND THEN~~ A030 BRANCHPOINT.

#@MM (9/15/22)
B&A Only:
Nursing home
assignment
moved to
appendix

A237

What kind of facility is that?

1. NURSING HOME OR SKILLED-NURSING FACILITY
2. MEMORY CARE CENTER
3. ASSISTED LIVING FACILITY
4. REHABILITATION CENTER
5. RETIREMENT COMMUNITY
6. SENIOR LIVING FACILITY
7. REST HOME
8. HOSPITAL
9. HOSPICE
10. OTHER (SPECIFY) A238 _____

A247

Do you have a private apartment, private room, or a shared room in this facility?

DEFINITION: A private apartment would include a kitchen facility for personal use while a private room would not.

A private apartment or private room may be shared with a spouse, partner, or family member. A shared room would be shared with someone outside of a spouse , partner, or family member."

Do you have a private apartment, private room, or a shared room in this facility?

DEFINITION: A private apartment would include a kitchen facility for personal use while a private room would not.

A private apartment or private room may be shared with a spouse, partner, or family member. A shared room would be shared with someone outside of a spouse , partner, or family member."

1. PRIVATE APARTMENT
2. PRIVATE ROOM
3. SHARED ROOM
7. OTHER

NOTE: SEE APPENDIX (SECTION 4. Nursing Home Status: A028) FOR MORE DETAILS.

A030 BRANCHPOINT: IF THIS IS A SECOND R (SCVXR1_R2=2), GO TO A047 BRANCHPOINT

IF R DID NOT REPORT THAT CURRENTLY HAS SAME SPOUSE/PARTNER AS AT LAST IW {(A020 {NOT 1 and NOT 3 and NOT 4}) GO TO A026 BRANCHPOINT

A030

IF R LIVES IN A NURSING HOME (A028=1):

(Are you and your [husband/wife/partner] living in the same (nursing home/health care facility))?

#@ SS (6/22/21):

Remove
instruction DEV#
48598

OTHERWISE:

(Are you and your [husband/wife/partner] living together)?

IF R HAS SAME SPOUSE/PARTNER AS AT HH's LAST IW (A020={1 or 3}) and R LIVES IN A NURSING HOME (A028=1):

~~[INSTR: IF R'S SPOUSE/PARTNER IS NOT IN A NURSING HOME, PLEASE SUSPEND THIS INTERVIEW AND INTERVIEW THE SPOUSE/PARTNER FIRST.]~~

IF R LIVES IN A NURSING HOME (A028=1):

Are you and your [husband/wife/partner] living in the same nursing home or health care facility?

OTHERWISE:

Are you and your [husband/wife/partner] living together?

IF THE EXIT R LIVED IN A HOSPICE AT TIME OF DEATH (A167/A167_A028=2):

Up until [he/she] went into the hospice were [you/[he/she] and [his/her] [husband/wife/partner]] living together in a house or apartment?

IF THE EXIT R LIVED IN A NURSING HOME AT TIME OF DEATH (A167/A167_A028=1):

At the time of [his/her] death were [you/[he/she] and [his/her] [husband/wife/partner]] living in the same (nursing home/health care facility)?

OTHERWISE:

At the time of [his/her] death were [you/[he/she] and [his/her] [husband/wife/partner]] living together in a house or apartment?

1. YES.....GO TO X004_2 BRANCHPOINT
5. NO
DK ~~[HIDE]~~.....GO TO X004_2 BRANCHPOINT
RF ~~[HIDE]~~.....GO TO X004_2 BRANCHPOINT

#@AA(9/27/22)
B&A_ONLY:
removed note;

~~NOTE: THE IWER SUSPENDS THE CASE AND INTERVIEWS THE OTHER R FIRST IF THIS R LIVES IN A NURSING HOME AND S/HE HAS THE SAME SPOUSE/PARTNER AS AT HH'S LAST IW--UNLESS THE IWER KNOWS THAT THE OTHER SPOUSE/PARTNER ALSO LIVES IN A NURSING HOME.~~

A031 BRANCHPOINT: IF THIS IS A NEW INTERVIEW HH (X024 NOT 1), GO TO A033

A031

In what month and year did you stop living together?
In what month and year did you stop living together?

[INSTR: IF YOU HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

In what month and year did [you/they] stop living together?

MONTHLIST (Enumerated)

97. NEVER LIVED TOGETHER.....GO TO A033

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER.....GO TO A033

A032

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A033

Is your [husband/wife/ partner] living in a nursing home or other health care facility?

DEFINITION: By "nursing home or other health facility" we mean a facility that provides all of the following services for **some or all of** its residents: dispensing of medication, 24-hour nursing assistance and supervision, personal assistance, and room & meals.

#@ DM3 MM
5/9/2022
updated
definition #49683
#@ DM3 MM
5/9/2022
changed QXQ
#49724

At the time of [RESPONDENT NAME]'s death, was [RESPONDENT NAME]'s [husband/wife/ partner]] living in a nursing home or other health care facility?

DEFINITION: By "nursing home or other health facility" we mean a facility that provides all of the following services for **some or all** of its residents: dispensing of medication, 24-hour nursing assistance and supervision, personal assistance, and room & meals.

- 1. YES
- 5. NO
- DK [HIDE]
- RF [HIDE]

End nursing home and living arrangements

A034 BRANCHPOINT: IF {R WAS NOT MARRIED AT HH's LAST IW (Preload_X065 NOT 1 **OR** 3) or DID NOT REPORT THAT IS MARRIED TO SAME SPOUSE AS HH's LAST IW ({A020} NOT 1)} and R DID NOT REPORT THAT PARTNER IS NOW SPOUSE (A020 NOT 3), GO TO A026 BRANCHPOINT

@DM3 MM
(4/21/2022)
B&A_ONLY added
"or 3" to X065
conditions.

A034

Would you say you are [married/partnered], or are you separated?
Would [he/she] have said [he/she] was [married/partnered], or separated?

- 1. MARRIED.....**GO TO X004 BRANCHPOINT**
- 2. SEPARATED.....GO TO A027
- DK [HIDE].....**GO TO X004 BRANCHPOINT**
- RF [HIDE].....**GO TO X004 BRANCHPOINT**

End marital status information, coupled PW

X004_2 BRANCHPOINT: IF THE DATE FOR THE BIRTHDATE IS COMPLETE THE SPOUSE AGE WILL BE CALCULATED AND A042_SpAge65, A043_SpAgeImpute, AND A044TSpAge_A THEN GO TO **X058** (R GRID). OTHERWISE ASK DATE OF BIRTH

#@ MM(9/23/22)
B&A ONLY:
Added R GRID
field

~~NOTE: the following three questions--X004, X005 and X067--are preload variables for a respondent's spouse's/partner's age that are updated if new information is provided from these questions, below. For new cohorts we have only the year of birth from the screener.~~

X004_2

In what month, day and year was your [new] [husband/wife/partner/spouse] born?

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

In what month, day and year was your [new] [husband/wife/partner] born?

(IF PROXY REPORTER IS SURVIVING SPOUSE/PARTNER (A009 A155=2):

In what month, day and year were you born?

OTHERWISE:

In what month, day and year was R's FIRST NAME 's [husband/wife/partner/spouse] born?)

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

MONTH [Drop down]

X005_2

(In what month, day and year was your [new] [husband/wife/partner] born?)

(IF PROXY REPORTER IS SURVIVING SPOUSE/PARTNER (A009 A155=2):

In what month, day and year were you born?

OTHERWISE:

In what month, day and year was R's FIRST NAME 's [husband/wife/partner] born?)

DAY [Drop down]

DK [HIDE]

RF [HIDE]

X067_2

(In what month, day and year was your [new] [husband/wife/partner] born?)

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

(In what month, day and year was your [new] [husband/wife/partner] born?)

#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

(IF PROXY REPORTER IS SURVIVING SPOUSE/PARTNER (A009 A155=2):

In what month, day and year were you born?

#@MM(1/4/23)

B&A Only:

Removed

reference to

A009 per #50148

OTHERWISE:

In what month, day and year was R's FIRST NAME 's [husband/wife/partner] born?)

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A042_A017 BRANCHPOINT: IF WE KNOW R's SPOUSE's/PARTNER's BIRTH YEAR {FROM {PRIOR IW or SCREENER} (X067 NOT EMPTY) or {FROM THIS IW (X067 {NOT DK and NOT RF}})}, ASSIGN APPROPRIATE AGE CATEGORY TO A042 (A042={1 or 2 or 3}) AND GO TO A043/A044 ASSIGNMENT

IF CAWI GO TO A026 BRANCHPOINT

A017_2

[INSTR: READ INTRO IF NECESSARY:

(An important part of this study is understanding how people make decisions during different stages of life. In order to do this,) we (also) need a general age range for your [husband/wife/partner].]

Is [he/she] 65 years of age or older?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESTIMATE OF WHETHER R'S SPOUSE/PARTNER IS 65 YEARS OF AGE OR OLDER. USE CODES '4' OR '5' TO RECORD YOUR ESTIMATE.]

~~An important part of this study is understanding how people make decisions during different stages of life. In order to do this, we also need a general age range for your [husband/wife/partner].~~

#@MM(9/23/22)

B&A ONLY: Not asked of CAWI

~~Is [he/she] 65 years of age or older?~~

[INSTR: READ INTRO IF NECESSARY:

(An important part of this study is understanding how people make decisions during different stages of life. In order to do this,) we (also) need a general age range for [you/R's FIRST NAME 's [husband/wife/partner]].]

#@MM(1/4/23)

B&A Only:

Removed

reference to

A009 per #50148

IF PROXY REPORTER IS SURVIVING SPOUSE/PARTNER (A009 A155=2):

Were you 65 years of age or older at the time [R's FIRST NAME] (died/passed away)?

OTHERWISE:

Was [he/she] 65 years of age or older at the time [R's FIRST NAME] (died/passed away)?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESTIMATE OF WHETHER R'S SPOUSE/PARTNER IS 65 YEARS OF AGE OR OLDER. USE CODES 4 OR 5 TO RECORD YOUR ESTIMATE.]

1. SPOUSE/PARTNER'S AGE OR BIRTHYEAR REPORTED (Assigned and hidden)
2. YES, 65 OR OVER
3. NO, UNDER 65
4. IWER ESTIMATE: SPOUSE/PARTNER AGE 65 OR OVER
5. IWER ESTIMATE: SPOUSE/PARTNER AGE UNDER 65

NOTE: R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

1. SPOUSE/PARTNER'S AGE OR BIRTHYEAR REPORTED (ASSIGNED AND HIDDEN)
2. YES, 65 OR OVER
3. NO, UNDER 65

Marital status information, uncoupled PW or not same Sp/Pt as previous wave (A026-A038)

A026 BRANCHPOINT: IF NOT COUPLED (A038=Other), CONTINUE

ELSE, GO TO Respondents Grid X058AFName

A026

IF REIW R WAS NOT PART OF A COUPLE AT HH's LAST IW (Preload_X065=6):
First we need to update our records. (As of [LAST IW MONTH (per X034), YEAR
(per X035) ~~FOR LAST WAVE'S 1ST R/LAST IW YEAR FOR LAST WAVE'S 1ST R~~])
[they/They] show that you were not married or living with a partner.

#@AA(9/28/22)
B&A_ONLY:
cleaned up fill;

Are you now married?

**IF R {REPORTED IN THIS IW THAT DOES NOT HAVE SAME SPOUSE/PARTNER AS
AT {HH's LAST WAVE OR CONFIRMATION} or WAS NOT ASKED} (A020={5 or
EMPTY}):**

IF THIS IS A REINTERVIEW HH (X024=1):

Are you married to someone else?

IF THIS IS A NEW COHORT IW (X024 NOT 1):

(We need to be sure our records are accurate.)

Are you now married?

OTHERWISE:

Are you married?

ALL:

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE
YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

IF REIW R WAS NOT PART OF A COUPLE AT HH's LAST IW (Preload_X065=6):

First we need to update our records. (As of [LAST IW MONTH (per X034), YEAR (per X035)] ~~FOR LAST WAVE'S 1ST R/LAST IW YEAR FOR LAST WAVE'S 1ST R~~) [they/They] show that you were not married or living with a partner.

Are you now married?

IF R {REPORTED IN THIS IW THAT DOES NOT HAVE SAME SPOUSE/PARTNER AS AT {HH's LAST WAVE OR CONFIRMATION} or WAS NOT ASKED} (A020={5 or EMPTY}):

IF THIS IS A REINTERVIEW HH (X024=1):

Are you married to someone else?

IF THIS IS A NEW COHORT IW (X024 NOT 1):

(We need to be sure our records are accurate. Are you now married?)

OTHERWISE:

Are you married?

ALL:

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

NOTE: FOR CAWI ONLY, DISPLAY THIS IWER INSTR AS RED.

First we need to update our records. As of [PREVIOUS WAVE MONTH/YEAR/two years ago], they show that [RFName] was not married or living with a partner. At the time [he/she] (died/passed away), was [he/she/RFNAME] married (to someone else)?

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]

1. YES.....GO TO A209 Branchpoint

5. NO

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.

NOTE: IF THIS IS CAWI, AND A026 = EMPTY, THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1. Abort Screens) FOR ABORT SCREEN TEXT.

A027

Are you living with (a/another) partner as if married?

[INSTR: ONCE YOU ANSWER THIS QUESTION YOU CANNOT BACK UP AND CHANGE THE ANSWER FOR THIS QUESTION.]

Are you living with a partner as if married?

[INSTR: ONCE YOU ANSWER THIS QUESTION YOU CANNOT BACK UP AND CHANGE THE ANSWER FOR THIS QUESTION.]

At the time [he/she] (died/passed away), did [he/she] have a partner [he/she] lived with as if married?

[INSTR: ONCE YOU ANSWER THIS QUESTION YOU CANNOT BACK UP AND CHANGE THE ANSWER FOR THIS QUESTION.]

1. YES

5. NO

~~CAWI prompt: "Your responses are important to us. Please try to answer each question."~~

#@ MM
(9/15/22) B&A
only: Moved
CAWI prompt to
Checks_Signals
tab.

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSE.

NOTE: IF THIS IS CAWI, AND A027 = EMPTY, THE CAWI INTERVIEW IS TERMINATED AND THE CASE IS SENT TO INTERVIEWER. SEE APPENDIX (SECTION 1. Abort Screens) FOR ABORT SCREEN TEXT.

A209 BRANCHPOINT: ASK IF R IS NEWLY MARRIED (A026=YES) OR NEWLY PARTNERED (A027=YES), CONTINUE

ELSE, GO TO X058AFName

#@AA(9/27/22)
B&A_ONLY:
clarified bp text;

A209

(Are you and your new [wife/husband/partner/spouse] living together [in the same (nursing home/healthcare facility)]?)

#@ SS (6/22/21):
Remove
instruction DEV#
48598

IF R IS IN A NURSING HOME (A028_RlnNHome = Yes):

~~INSTR: IF R'S SPOUSE/PARTNER IS NOT IN A NURSING HOME, PLEASE SUSPEND THIS INTERVIEW AND INTERVIEW THE SPOUSE/PARTNER FIRST. }~~

Are you and your new [wife/husband/partner/spouse] living together [in the same(nursing home/healthcare facility)]?

At the time of (his/her) death were you living together in a house or apartment?

1. ☒ YES
5. NO.....GO TO A210
DK ~~{HIDE}~~
RF ~~{HIDE}~~

A036 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024=1) and {R {DID NOT SAY {THAT IS NEWLY MARRIED (A026 NOT 1) or DID NOT SAY IS NOW LIVING TOGETHER WITH NEW SPOUSE/PARTNER (A030 NOT 1)} and {DID NOT SAY IS NEWLY PARTNERED (A027 NOT 1), GO TO X004_3 (Tag#=A039) BRANCHPOINT

IF THIS IS A NEW INTERVIEW HH (X024 NOT 1) and {R IS NOT CATEGORIZED AS {PARTNERED or REPARTNERED} (A038 {NOT 3 and NOT 4}), GO TO X004_3 (Tag#=A039) BRANCHPOINT

A036

In what month and year did you and your new [husband/wife/partner/spouse] start living together?

[INSTR: IF R AND [his/her] NEW [husband/wife/partner] HAVE NEVER LIVED TOGETHER SELECT NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

In what month and year did you and your new [husband/wife/partner/spouse] start living together?

[INSTR: IF YOU AND YOUR NEW [HUSBAND/WIFE/PARTNER/SPOUSE] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

In what month and year did [RESPONDENT NAME] and [his/her] (new)[husband/wife/partner/spouse]] start living together?

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER.....GO TO X004_3 BRANCHPOINT

A037

(In what month and year did you and your new [husband/wife/partner] start living together?)

(In what month and year did R's FIRST NAME and [you/[his/her] (new) [husband/wife/ partner]] start living together?)

YEAR [YYYY]

DK ~~{HIDE}~~
RF ~~{HIDE}~~

A045

NEW SPOUSE/PARTNER DETERMINATION

THE RESPONDENT WAS DETERMINED TO HAVE A {NEW SPOUSE OR NEW PARTNER} (A045=1)

IF THE RESPONDENT IS:

- (a) REMARRIED (A026=1) and NOT SEPARATED (A034 NOT 2), or
- (b) REPARTNERED (A027=1) and LIVING TOGETHER (A030 NOT 5), or
- (c) SEPARATED BUT WITH NEW PARTNER (A035=1)

OTHERWISE, THE RESPONDENT WAS DETERMINED NOT TO HAVE A NEW SPOUSE/PARTNER (A045=5)

New or different spouse/partner from previous wave, not living together(A210-A213)

A210 BRANCHPOINT: IF A209 IS NO, CONTINUE

ELSE, GO TO X004_3

A210

In what month and year did you stop living together?

[INSTR: IF R AND [HWPS] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

In what month and year did you stop living together?

[IF YOU AND YOUR [HWPS] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

In what month and year did [you/they] stop living together?

[INSTR: IF R AND [HWPS] HAVE NEVER LIVED TOGETHER SELECT 'NEVER LIVED TOGETHER' FROM THE BOTTOM OF THE MONTH LIST.]

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER.....GO TO A230

A211

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A230

Is your [husband/wife/partner/spouse] living in a nursing home or other health care facility?

#@ DM3 MM
5/9/2022
updated
definition #49683
#@ DM3 MM
5/9/2022 entered
new QXQ #49727

DEFINITION: By "nursing home or other health facility" we mean a facility that provides all of the following services for **some or all of** its residents: dispensing of medication, 24-hour nursing assistance and supervision, personal assistance, and room & meals.

At the time of [R's FIRST NAME] death, were you living in a nursing home or other health care facility?

DEFINITION: By "nursing home or other health facility" we mean a facility that provides all of the following services for **some or all of** its residents: dispensing of medication, 24-hour nursing assistance and supervision, personal assistance, and room & meals.

- 1. YES
- 2. NO
- DK [HIDE]
- RF [HIDE]

A231

Would you say you are [married/partnered], or are you separated?
Would [he/she] have said [he/she] was [married/partnered], or separated?

- 1. [Married/Partnered].....GO TO X004_3 BRANCHPOINT
- 2. Separated
- DK.....Go to X004_3
- RF.....Go to X004_3

A035

Are you living with a partner as if married?
At the time of [his/her] death, was [he/she] living with a partner as if married?

- 1. YES
- 5. NO
- DK [HIDE]
- RF [HIDE]

A038TCo
uplenss_
A

A038 & X065: COUPLENESS ASSIGNMENT UPDATE

THE FOLLOWING COUPLENESS CODES WERE ASSIGNED TO A038 & X065 BASED ON R's RESPONSE TO A035:

- 3. **PARTNERED_VOL**: IF R IS SEPARATED AND LIVING WITH A NEW PARTNER (A035=1)
- 6. **OTHER**: IF R WAS ASKED AND SAID IS NOT LIVING WITH A NEW PARTNER (A035 NOT 1)

End marital status information, uncoupled PW or not same Sp/Pt as previous wave

SCV.XSplit BRANCHPOINT: IF THIS IS A NEW INTERVIEW HH (X024 NOT 1), COMPLETE THE XSPLIT CALCULATION THEN GO TO X004_3 BRANCHPOINT

Xsplit

THIS IS AN ASSIGNED VARIABLE.

SCV.Xsplit: MARITAL/MORTALITY DETERMINATION OF SPLIT HOUSEHOLD

A household can be split if it is decided that two respondents, previously interviewed as in one household, no longer remain together as a couple. Then data are not shared between respondents. Interviews are conducted on each respondent independently and each of these can then acquire a new spouse/partner as a second respondent in that new household.

In the case where a respondent reported that the spouse/partner has died (A023=5), independent interviews are conducted for each: as an exit interview for the deceased R and as a core interview of the surviving spouse/partner (the household was split after A025). Where the first R was reported deceased (A007=5), the household was split after A007.

THE FOLLOWING CONDITIONS DETERMINE WHETHER THE REINTERVIEW HOUSEHOLD IS CONSIDERED TO BE SPLIT.

HOUSEHOLD IS SPLIT (SCV.XSplit=1):

IF R WAS COUPLED AT THE LAST WAVE (SCV.XNumR=2) and
{R DOES NOT HAVE THE SAME SPOUSE/PARTNER AS AT THE LAST WAVE (A020=5) or R IS SEPARATED (A034=2)} and R's SPOUSE/PARTNER IS STILL LIVING (A023=1));

or

IF R WAS COUPLED AT THE LAST WAVE (SCV.XNumR=2) and
ONE OR BOTH MEMBERS OF THE COUPLE HAS DIED (A007=5 or A023=5).

HOUSEHOLD IS NOT SPLIT (SCV.XSplit=5):

End marital status information, uncoupled PW or not same Sp/Pt as previous wave

X004_3 (Tag#=A039) BRANCHPOINT: IF R IS NOT CURRENTLY COUPLED (A038=6), GO TO R ROSTER (X058)

IF THE DATE FOR THE BIRTHDATE IS COMPLETE THE SPOUSE AGE WILL BE CALCULATED AND A042_SpAge65, A043_SpAgeImpute, AND A044TSpAge_A

X004_3

In what month, day and year was your new [husband/wife/partner] born?

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

In what month, day and year was [SPOUSE/PARTNER NAME] born?

[INSTR: PLEASE CONFIRM YOUR ENTRY BEFORE PROCEEDING. YOU WILL NOT BE ABLE TO CHANGE THE BIRTH YEAR ONCE YOU HAVE ADVANCED TO THE NEXT SCREEN.]

MONTH [Drop down]

X005_3

DAY [Drop Down]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

X067_3

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A042_A017 BRANCHPOINT: IF WE KNOW R's SPOUSE's/PARTNER's BIRTH YEAR {FROM {PRIOR IW or SCREENER} (X067 NOT EMPTY) or {FROM THIS IW (X067 {NOT DK and NOT RF}}}, ASSIGN APPROPRIATE AGE CATEGORY TO A042 (A042={1 or 2 or 3}), AND GO TO A043/A044 ASSIGNMENT

A017_3

INSTR: READ INTRO IF NECESSARY:

(An important part of this study is understanding how people make decisions during different stages of life. In order to do this,) we (also) need a general age range for your [husband/wife/partner].

Is [he/she] 65 years of age or older?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESTIMATE OF WHETHER R'S SPOUSE/PARTNER IS 65 YEARS OF AGE OR OLDER. USE CODES '4' OR '5' TO RECORD YOUR ESTIMATE.]

An important part of this study is understanding how people make decisions during different stages of life. In order to do this, we also need a general age range for your [husband/wife/partner].

Is [he/she] 65 years of age or older?

[INSTR: READ INTRO IF NECESSARY:

(An important part of this study is understanding how people make decisions during different stages of life. In order to do this,) we (also) need a general age range for [you/R's FIRST NAME 's [husband/wife/partner]].

#@MM(1/4/23)

B&A Only:

Removed

reference to

A009 per #50148

IF PROXY REPORTER IS SURVIVING SPOUSE/PARTNER (A009 A155=2):

Were you 65 years of age or older at the time R's FIRST NAME (died/passed away)?

OTHERWISE:

Was [he/she] 65 years of age or older at the time R's FIRST NAME (died/passed away)?

[INSTR: IF NO RESPONSE, ENTER YOUR BEST ESTIMATE OF WHETHER R'S SPOUSE/PARTNER IS 65 YEARS OF AGE OR OLDER. USE CODES 4 OR 5 TO RECORD YOUR ESTIMATE.]

1. SPOUSE/PARTNER'S AGE OR BIRTHYEAR REPORTED [HIDDEN]
2. YES, 65 OR OVER
3. NO, UNDER 65
4. IWER ESTIMATE: SPOUSE/PARTNER AGE 65 OR OVER
5. IWER ESTIMATE: SPOUSE/PARTNER AGE UNDER 65

NOTE: R OR IWER MUST ANSWER THIS QUESTION. 'DON'T KNOW' OR 'REFUSE' ARE NOT ACCEPTABLE RESPONSES.

1. SPOUSE/PARTNER'S AGE OR BIRTHYEAR REPORTED [HIDDEN]
2. YES, 65 OR OVER
3. NO, UNDER 65

Respondents grid questions (X058-A047)

A042/A0

43/A044

R's SPOUSE's/PARTNER's AGE ASSIGNMENT

A043/A044 ARE VARIABLES WHERE THE R's SPOUSE's/PARTNER's EXACT OR IMPUTED AGE IS STORED BASED ON INFORMATION PROVIDED IN A PRIOR WAVE OR ON INFORMATION PROVIDED IN THIS IW AT QUESTIONS X004_3, X005_3 AND X067_3 (CORRESPONDING TO TAG#s A039, A040 AND A041, RESPECTIVELY). IF NEITHER OF THESE SOURCES PROVIDES AT LEAST A BIRTH YEAR, THEN THE AGE IS IMPUTED FROM A042.

R ROSTER {CORE CAPI, CAWI AND EXIT}: Displays X054APNdx, X058AFName, X017ARLName, X060ASex, X067AYrBorn

Screen Layout for R-Grid

NOTE: THE FIRST SCREEN DISPLAYS PRE-FILLED INFORMATION ABOUT THE R, THE SECOND SCREEN IS PREFILLED INFORMATION ABOUT THE PW, STILL CURRENT SPOUSE/PARTNER, THE THIRD SCREEN DISPLAYS SOME INFORMATION ABOUT A NEW SPOUSE/PARTNER. FORMER SPOUSES/PARTNERS (EX- OR DECEASED) ARE NOT SHOWN.

NOTE: THE INTERVIEWER ASKS QUESTIONS, IN BOTH CORE AND EXIT IWS, OF THE RESPONDENT/PROXY AS NEEDED IN ORDER TO VERIFY INFORMATION ABOUT THE RESPONDENT AND SPOUSE/PARTNER (IF ANY) IN THE R ROSTER, OR TO GATHER INFORMATION ABOUT THE FIRST R's (NEW) SPOUSE/PARTNER.

X058

[INSTR: PLEASE ASK OR CONFIRM.]

#@ AA
(11/01/2021):
dropped "if
necessary";
#49231.

[INSTR: PLEASE REVIEW THE BELOW INFORMATION WE HAVE FOR [Fill: R FIRST NAME R LAST NAME] ['S HWPS] AND MAKE CORRECTIONS AS NECESSARY.]

[INSTR: ~~if necessary~~, VERIFY SPELLING OF [R FNAME/SPP FNAME]'S FIRST NAME.]

[INSTR: IF THERE IS MORE THAN A 5-YEAR DISCREPANCY BETWEEN [R FNAME/SPP FNAME]'S YEAR OF BIRTH AND WHAT IS DISPLAYED, VERIFY THAT THIS INFORMATION IS FOR THE CORRECT [R FNAME/SPP FNAME].]

[R/SPP] BIRTH YEAR: [Fill: YOB FILL]

IF THIS IS A NEW SPOUSE/PARTNER:

[INSTR: PLEASE FILL IN THE BELOW INFORMATION FOR [Fill: R FIRST NAME R LAST NAME]'S NEW [Fill: SPOUSE/PARTNER].]

(What is [Fill: R FIRST NAME]'S new [Fill: Spouse/Partner]'S first name?)

IF THIS IS AN UNCOUPLED R OR AN R WHO IS COUPLED WITH THE SAME SPP AS PRIOR WAVE:

[INSTR: PLEASE TAKE A MOMENT TO REVIEW THE BELOW INFORMATION WE HAVE FOR YOU AND MAKE CORRECTIONS AS NECESSARY. WHEN YOU ARE FINISHED, SELECT "NEXT" TO CONTINUE.]

IF THIS IS THE PW SPOUSE LINE:

[INSTR: PLEASE REVIEW AND CORRECT IF NECESSARY, THE INFORMATION WE HAVE FOR YOUR [husband/wife/partner]. WHEN YOU ARE FINISHED, SELECT "NEXT" TO CONTINUE.]

IF THIS IS A NEW SPOUSE LINE:

[INSTR: PLEASE FILL IN THE BELOW INFORMATION FOR YOUR NEW [husband/wife/partner]. WHEN YOU ARE FINISHED, SELECT "NEXT" TO CONTINUE.]

FIRST NAME _____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

X017

CAPI:

[INSTR: ~~if necessary~~, VERIFY SPELLING OF [R/SPP FNAME]'s LAST NAME.]

IF THIS IS A NEW SPOUSE/PARTNER:

(What is [Fill: SPP FNAME]'s last name?)

LAST NAME_____

DK ~~{HIDE}~~

RF ~~{HIDE}~~

#@ AA

(11/01/2021):

dropped "if

necessary";

#49232.

X060

CAPI:

[INSTR:IF NECESSARY, VERIFY [R/SPP FNAME]'s SEX.]

IF THIS IS A NEW SPOUSE/PARTNER:

(What is [Fill: SPP FNAME]'s sex?)

SEX [Drop down}

1. MALE

2. FEMALE

A227 BRANCHPOINT: IF THIS IS A CAWI INTERVIEW, GO TO A047 BRANCHPOINT

A227

(IS YEAR OF BIRTH CORRECT?)

YEAR OF BIRTH: [YOB FILL]

[INSTR: IF YEAR OF BIRTH IS INCORRECT ENTER F2 NOTE WITH CORRECT YEAR. THIS WILL NOT BE CORRECTED FOR THIS INTERVIEW, BUT WE WILL CORRECT IT NEXT WAVE.]

1. YES

5. NO

A047 BRANCHPOINT: IF THIS IS A SECOND R (SCVXR1_R2=2), GO TO CONFIRMATION (AFTER A047)

A047

R ROSTER CONFIRM:

#@MM(1/4/23)
B&A Only:
Removed
reference to
A009 per #50148

[INSTR: PLEASE REVIEW THE INFORMATION BELOW AND MAKE SURE IT IS CORRECT BEFORE PROCEEDING. IF EVERYTHING IS CORRECT, ENTER '1' TO CONTINUE.]

[INSTR: IF LIVING STATUS, GENDER, OR COUPLENESS STATUS IS INCORRECT, SUSPEND THE INTERVIEW AND START OVER.]

[INSTR: IF ANY OTHER INFORMATION IS INCORRECT, BACK UP AND CHANGE THE INFORMATION BEFORE PROCEEDING.]

R's NAME: R's FIRST NAME

R's gender: R's gener

IS R ALIVE?: (per A007)

R's COUPLENESS STATUS: (per A038) (SP/PARTNER NAME:) CURRENT SPOUSE's/PARTNER's FIRST NAME

IW TYPE: (per A009 A155)

R LIVES IN A NURSING HOME OR OTHER FACILITY: (per A028)

Next are some questions about changes in your housing location.

[INSTR: PLEASE SELECT THE "NEXT" BUTTON TO PROCEED.]

1. CONTINUE

DK ~~{HIDE}~~

RF ~~{HIDE}~~

NOTE: AT THIS POINT SCV.XINITATION IS SET TO PHASE 1. WHEN PHASE 1 IS SET, IMPORTANT INFORMATION ABOUT THE RESPONDENT INCLUDING NAME, LIVING STATUS, GENDER, AND COUPLENESS IS COPIED TO THE FINAL UPDATED PRELOAD BLOCK TO BE USED LATER AS MAJOR FLOW CONTROLS. SEE APPENDIX (SECTION 5. SCV.XINITATION - PHASE 1 AND PHASE 2) FOR MORE DETAILS.

End respondents grid questions

PUCONFIRMATION BRANCHPOINT: IF THIS IS A FIRST R, GO TO A050 BRANCHPOINT

ELSE, IF THIS IS A CAWI IW, ASSIGN 1 AND GO TO A050 BRANCHPOINT

#@ AA
(11/16/21)
B&A_ONLY:
Added skip for
1st R;

PuConfir
mation

Confirmation: Second r roster confirm:

[INSTR: PLEASE CONFIRM THAT THE FOLLOWING INFORMATION IS CORRECT. IF YES, ENTER '1' TO CONTINUE.]

[INSTR: IF LIVING STATUS IS INCORRECT, SUSPEND THE CASE AND START OVER.]

[INSTR: IF COUPLENESS STATUS IS INCORRECT, SUSPEND THE CASE AND CONTACT YOUR TL. COUPLENESS STATUS CANNOT BE CHANGED BY THE 2ND R, SO THE LINE WILL NEED TO BE RESET.]

[INSTR: IF ANY OTHER INFORMATION IS INCORRECT, BACK UP AND CHANGE THE INFORMATION BEFORE PROCEEDING.]

R's NAME: R's FIRST NAME

IS R ALIVE?: (per A007)

R's COUPLENESS STATUS: (per A038)

(SP/PARTNER NAME:) CURRENT SPOUSE's/PARTNER's FIRST NAME

IW TYPE: (per ~~A009~~ A155)

R LIVES IN A NURSING HOME OR OTHER FACILITY: (per A028)

Please select "Next" to proceed.

Confirmation SECOND R ROSTER CONFIRM:

[INSTR: PLEASE CONFIRM THAT THE FOLLOWING INFORMATION IS CORRECT. IF YES, ENTER '1' TO CONTINUE.]

[INSTR: IF LIVING STATUS IS INCORRECT, SUSPEND THE CASE AND START OVER.]

[INSTR: IF COUPLENESS STATUS IS INCORRECT, SUSPEND THE CASE AND CONTACT YOUR TL. COUPLENESS STATUS CANNOT BE CHANGED BY THE 2nd R, SO THE LINE WILL NEED TO BE RESET.]

[INSTR: IF ANY OTHER INFORMATION IS INCORRECT, BACK UP AND CHANGE THE INFORMATION BEFORE PROCEEDING.]

R's NAME: R's FIRST NAME

IS R ALIVE?: (per A007)

R's COUPLENESS STATUS: (per A038) (SP/PARTNER NAME:) CURRENT SPOUSE's/PARTNER's FIRST NAME

IW TYPE: (per ~~A009~~ A155)

R LIVES IN A NURSING HOME OR OTHER FACILITY: (per A028)

1. CONTINUE

DK ~~{HIDE}~~

RF ~~{HIDE}~~

A050 BRANCHPOINT: IF THIS IS A CAWI IW-~~or~~ A SECOND R (SCVXR1_R2=2), GO TO A065 BRANCHPOINT

IF R CURRENTLY IS NOT PART OF A COUPLE (X065=6) **or IF THIS IS AN EXIT INTERVIEW**, GO TO A055 BRANCHPOINT

ELSE, IF THIS IS A REINTERVIEW HH (X024=1), GO TO A053

ELSE, IF THIS A SECOND R (SCVXR1_R2=2), GO TO A065 BRANCHPOINT

#@AA(12/7/22)
Re-added CAWI
condition;
#50132
#@ AA (6/24/21):
Removed CAWI
skip; #48594
#@ AA (6/22/21):
moved 2nd R
condition;
#48594

A050

I would like to interview both you and your **[new]** [husband/wife/partner/**spouse**].
I will be asking some questions about family **income**, assets, debts and retirement planning.

Which of you is the most knowledgeable about this, you or your
[husband/wife/partner]?

#@ AA (2/7/22)
B&A_ONLY:
added missing
fills (new,
spouse);
#@ SS (6/22/21):
Add "income" to
Qtext DEV#48596

1. RESPONDENT
2. SPOUSE/PARTNER
3. DK ~~{HIDE}~~/REF: RESPONDENT IS MALE
4. DK ~~{HIDE}~~/REF: SPOUSE/PARTNER IS MALE
5. DK ~~{HIDE}~~/REF: SAME SEX COUPLE, RESPONDENT
- 6. RESPONDENT BOTH FINANCIAL AND FAMILY**
- 7. RESPONDENT NOT FINANCIAL OR FAMILY**
- DK ~~{HIDE}~~
- RF ~~{HIDE}~~

#@ SS (6/21/21):
Remove strikeout
to keep codes 6
and 7 per DEV
#48520

#@ AA (5/11/21):
revised
codeframe;
#48520

Financial-Family assignment (A051-A055)

NOTE: SEE (SECTION 6. Financial – Family Respondent Assignments) APPENDIX FOR MORE DETAILS ABOUT THE FINANCIAL & FAMILY ASSIGNMENT.

A053 BRANCHPOINT: ~~IF THIS IS A CAWI INTERVIEW, GO TO A065 BRANCHPOINT~~

IF THIS IS A CAWI INTERVIEW AND IF THE Financial R COMPLETED AN INTERVIEW THROUGH SEC Q IN THE PW (x039 > 2019) , GO TO A065 BRANCHPOINT

ELSE, IF THE Financial R COMPLETED AN INTERVIEW THROUGH SEC Q IN THE PW (x039 > 2019) OR IF THIS IS A NEW R (X024 NOT 5) OR IF THIS R IS MINORITY OVER SAMPLE (X532 =1), CONTINUE TO A053.

ELSE, IF THIS IS THE FIRST R AND FIRST R IS THE PRELOADED Financial R (X007= 1 or 3), THEN LEAVE ASSIGNMENT AS STATED, ASSIGN (A053=5) , SKIP A053 AND GO TO A065 BRANCHPOINT.

ELSE, IF THIS IS THE FIRST R AND FIRST R IS Non-Financial & Non-Family R (X007=4), ASSIGN A053=1 AND A055=1 AND GO TO A065 BRANCHPOINT

ELSE, IF THIS IS THE FIRST R AND FIRST R IS NOT THE PRELOADED Financial R (X007= 2 or 4), THEN ASSIGN AS Financial & Family R (ASSIGN A053=1 AND A055=3) AND GO TO A065 BRANCHPOINT

ELSE, IF THIS IS THE SECOND R AND IF THE FIRST R WAS INITIALLY PRELOADED AS THE Financial R AND THE FIRST R COMPLETED THROUGH SEC Q IN CURRENT WAVE THEN LEAVE ASSIGNMENT AS STATED (ASSIGN A053=5) AND GO TO A065 BRANCHPOINT.

ELSE, IF THIS IS THE SECOND R AND IF THE FIRST R WAS INITIALLY PRELOADED AS THE Financial & Family R AND THE FIRST R DID NOT COMPLETED THROUGH SEC Q IN CURRENT WAVE AND SECOND R IS Non-Financial & Non-Family R (X007=4), ASSIGN A053=1 AND A055=1 AND GO TO A065 BRANCHPOINT

ELSE, IF THIS IS THE SECOND R AND IF THE FIRST R WAS INITIALLY PRELOADED AS THE Financial AND THE FIRST R DID NOT COMPLETED THROUGH SEC Q IN CURRENT WAVE AND SECOND R IS NOT THE PRELOADED FIN R (X007 = 2 or 4), THEN ASSIGN AS Financial & Family R (ASSIGN A053=1 AND A055=3) AND GO TO A065 BRANCHPOINT

ELSE, IF THIS IS THE SECOND R AND IF THE SECOND R WAS INITIALLY PRELOADED AS THE FIN R THEN LEAVE ASSIGNMENT AS STATED (ASSIGN A053=5) AND GO TO A065 BRANCHPOINT.

#@ AA (9/16/21):
added New R and
minority to 2nd
condition;
#48892.

#@ AA (6/24/21):
Added CAWI
assignment;
#48594

#@ AA (6/22/21):
updated fin/fam
assignment;
#48594

A053

~~NOTE: THE SCREEN DISPLAYS THE CURRENT R TYPE ASSIGNMENT FOR FINANCIAL R/FAMILY R FOR THE FIRST R (A051) AND FOR CURRENT SPOUSE/PARTNER (A052) (IF ANY).~~

~~NOTE: THE ASSIGNMENTS ARE DISPLAYED IN THE FOLLOWING FORM, WITH ONLY THE RELEVANT PORTIONS SHOWN:~~

[INSTR: [R FIRST NAME] IS THE [FINANCIAL R/FAMILY R/FINANCIAL & FAMILY R/NON-FINANCIAL & NON-FAMILY R.]]

[INSTR: [CURRENT SPOUSE/PARTNER FIRST NAME] IS THE [FINANCIAL R/FAMILY R/FINANCIAL & FAMILY R/NON-FINANCIAL & NON-FAMILY R.]]

IF THIS IS A REINTERVIEW HH (X024=1):

[INSTR: IF R INDICATES THEIR SPOUSE OR PARTNER WILL NOT COMPLETE AN INTERVIEW THIS WAVE, PLEASE MAKE CURRENT R FINANCIAL & FAMILY R.]

OTHERWISE:

[INSTR: MAKE SURE R APPROVES OF ASSIGNMENT.]

~~IF THIS IS A REINTERVIEW HH (X024=1) AND IF FIN R DIDN'T COMPLETE FIN SECTION PW (X039 < 2020) AND 1st R DID NOT COMPLETE FIN SECTION THIS WAVE (HHX531_Qcomplete NOT YES)~~

~~[INSTR: IN THE PREVIOUS WAVE, THE FINANCIAL R FOR THIS COUPLE DID NOT COMPLETE AN INTERVIEW. WE HAVE REASSIGNED[R's NAME] as FIN R TO ENSURE WE OBTAIN A FINANCIAL REPORT FOR THE COUPLE THIS WAVE. IF THE OTHER R~~

1. CHANGE ASSIGNMENTS

5. LEAVE ASSIGNMENT AS STATED.....GO TO A065 BRANCHPOINT

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSE.

A054

[INSTR: WHY ARE YOU CHANGING THIS ASSIGNMENT?]

~~OPEN~~ _____

A055 BRANCHPOINT: IF R CURRENTLY IS NOT PART OF A COUPLE (X065=6) **or IF THIS IS AN EXIT INTERVIEW**, ASSIGN "3. FINANCIAL & FAMILY R" TO X007 AND GO TO A065 BRANCHPOINT

#@AA(9/28/22)B
&A_ONLY:
dropped notes;
#@AA(9/28/22)
B&A_ONLY:
removed qxqs;
dev#49551
#@ AA (9/13/21):
Dropped 2 instrs;
#48847
#@ SS (6/22/21):
Added instruction
DEV#48595

#@AA(9/28/22)
B&A_ONLY:
Removed "open"
prelabel;

A055

[INSTR: CHANGE [R FIRST NAME] TO:]

1. FINANCIAL R
2. FAMILY R
3. FINANCIAL & FAMILY R
4. NON-FINANCIAL & NON-FAMILY R

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSE.

End Financial-Family assignment

Additional nursing home questions (A065-A070)

A065 BRANCHPOINT: IF R DOES/DID NOT LIVE IN NURSING HOME (A028 NOT 1),
GO TO A071 BRANCHPOINT

A065

In what month and year did you move to the (nursing home/health care facility/hospice) where you are now living?

In what month and year did you move to the nursing home, health care facility or hospice where you are now living?

In what month and year did [RESPONDENT NAME] move to the (nursing home/health care facility/hospice) where [he/she] was a resident just before [his/her] death?

MONTH

A066

YEAR [YYYY]

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A248_Fa
cilityName

What is the name of this facility?

FACILITY NAME _____

A249_Fa
cilityAddress
1

What is the address of this facility?

[INSTR: PLEASE ENTER STREET ADDRESS BELOW.]

[INSTR: AFTER PROBING, USE CTRL-D OR CTRL-R AS NECESSARY.]

What is the address of this facility?

ADDRESS 1 _____

A250_Fa
cilityAddr
2

ADDRESS 2 _____ (Optional)

A067

[INSTR: PLEASE ENTER THE CITY AND STATE, THEN SELECT CORRECT LOCATION FROM THE LIST.]

[INSTR: IF ZIPCODE IS NOT KNOWN THEN SELECT THE LINE THAT SHOWS DK IN ZIPCODE.]

[INSTR: IF THERE IS NOT A DK OPTION, SELECT THE CLOSEST MATCH TO THIS CITY/STATE COMBINATION AND MAKE AN F2 COMMENT THAT R DOESN'T KNOW ZIPCODE.]

[INSTR: BEFORE CONTINUING, PLEASE CHECK THAT YOU HAVE ENTERED THE CORRECT INFORMATION.]

In what city and state was the (nursing home/health care facility/hospice)where [he/she] was living?

[INSTR: PLEASE ENTER THE CITY AND STATE, THEN SELECT CORRECT LOCATION FROM THE LIST.]

[INSTR: IF ZIPCODE IS NOT KNOWN THEN SELECT THE LINE THAT SHOWS DK IN ZIPCODE.]

[IF THERE IS NOT A DK OPTION, SELECT THE CLOSEST MATCH TO THIS CITY/STATE COMBINATION AND MAKE AN F2 COMMENT THAT R DOESN'T KNOW ZIPCODE.]

[INSTR: BEFORE CONTINUING, PLEASE CHECK THAT YOU HAVE ENTERED THE CORRECT INFORMATION.]

CITY _____

DK ~~[HIDE]~~
RF ~~[HIDE]~~

A168_A0
68

STATE _____ GO TO A070

#@MM(9/23/22)
B&A ONLY:
standardized
codebox

97. OTHER COUNTRY ~~[OS Text Box]~~ (A069S) _____

DK ~~[HIDE]~~GO TO A070

RF ~~[HIDE]~~GO TO A070

A069S

Country _____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A251 BRANCHPOINT: IF THIS IS AN EXIT, GO TO A070 BRANCHPOINT
ASK IF NURSING HOME IS NOT IN ANOTHER COUNTRY (A168_A068 NOT 97)

ELSE: GO TO A070 BRANCHPOINT

A251_Fa
cilityZip

ZIP _____

CAPI NOTE: CITY, STATE, AND ZIP ARE COLLECTED USING A LOOKUP DATABASE.
THE LOOKUP FIELD IS CALLED "CtyNHome_FacilityZIP". THIS NEW FIELDS WRITES
BACK A067 AND A168_A068, AND A251.

A070 BRANCHPOINT:

SKIP:

IF THIS IS {THE SECOND R (SCVXR1_R2=2) and NOT A FINANCIAL R (A055 {NOT 1
and NOT 3 }) , GO TO A071 BRANCHPOINT

ASK:

IF THIS IS A FIRST R (SCVR1_R2=1) OR FINANCIAL R (A055 = 1 OR 3) ASK

ELSE: IF THIS IS A SECOND R AND DID NOT COMPLETE A FIN R IW LAST WAVE (X039
< PW YEAR) AND THIS IS A FINANCIAL R (X007 = 1 OR 3).

ELSE: GO TO A071 BRANCHPOINT

#@ AA dm#3
(5/12/22): added
ask lang and ask
updated
condition to use
A055 and x007
since A055 wasn't
always being
assigned; #49729

A070

Do you still own or rent a residence outside the facility where you are living?

[Did RFNAME] still own or rent a residence outside the facility where [he/she] was
living?

1. YES

5. NO

DK ~~[HIDE]~~

RF ~~[HIDE]~~

End additional nursing home questions

Housing location and residence questions (A071-A110)

A071 BRANCHPOINT: IF THIS IS THE SECOND R (SCVXR1_R2=2) or {R LIVES/**LIVED** IN A NURSING HOME (A028=1) and DID NOT REPORT THAT STILL OWNS HOME OUTSIDE FACILITY (A070 NOT 1)}, GO TO A079 BRANCHPOINT

ELSE, IF THIS IS A NEW INTERVIEW HH (X024 NOT 1) and HH's LAST INTERVIEW MAIN RESIDENCE CITY IS NOT KNOWN (X025=EMPTY), GO TO A075 BRANCHPOINT

ELSE, IF HH's LAST INTERVIEW MAIN RESIDENCE CITY IS NOT KNOWN (X025=EMPTY), GO TO A073 BRANCHPOINT

A071

IF THIS IS A NEW INTERVIEW HH (X024 NOT 1):

Next are some questions about your housing location.

According to our records you live in [RESIDENCE CITY (X025), STATE (X026)]. Are you still living, all or part of the year, in that same residence in [HH's LAST IW 1ST RESIDENCE CITY]?

IF THIS IS A REINTERVIEW HH (X024=1):

Next are some questions about changes in your (and your [husband/wife/partner]'s) housing location.

Our records show that [in LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/in LAST IW YEAR FOR LAST-WAVE'S 1ST R/two years ago] [your residence/one of your residences] was in [HH's LAST IW 1ST RESIDENCE CITY (X025), STATE (X026)].

IF R LIVES IN A NURSING HOME or HOSPICE (A028=1 or 2):

Do you still have the same residence in [HH's LAST IW 1ST RESIDENCE CITY]?

OTHERWISE:

Are you still living, all or part of the year, in that same residence in [HH's LAST IW 1ST RESIDENCE CITY]?

Next are some questions about changes in [[R's FIRST NAME's/your [and your/[[his/her] [husband's/wife's/partner's]]] housing location.

Our records show that [in LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/in LAST IW YEAR FOR LAST-WAVE'S 1ST R/two years ago], [your/[his/her]/their] residence/one of [your/[his/her]/their] residences]] was in /According to our records [you live in/they live in/[he/she] lives in]] [HH's LAST IW 1ST RESIDENCE CITY (X025), STATE (X026)].

**IF R LIVED IN A NURSING HOME or HOSPICE AT TIME OF DEATH
(A167/A167_A028=1 or 2):**

At the time [R's FIRST NAME] (died/passed away) [did you/(did [he/she]/did they)] still have the same residence in [HH's LAST IW 1ST RESIDENCE CITY)?

OTHERWISE:

At the time [R's FIRST NAME] (died/passed away) [were you/(was [he/she]/were they)] still living, all or part of the year, in that same residence in [HH's LAST IW 1ST RESIDENCE CITY)?

1. YES

5. NO.....GO TO **A072 A073 Branchpoint**

DK ~~[HIDE]~~.....GO TO **A072 A073 Branchpoint**

RF ~~[HIDE]~~.....GO TO **A072 A073 Branchpoint**

~~CAWI prompt: "Your responses are important to us. Please try to answer each question."~~

#@ AA (6/9/21):
Drop A072;
#48582
#@ MM
(9/15/22) B&A
only: Moved
CAWI prompt to
Checks_Signals
tab.

A078 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024=1), GO TO A073
BRANCHPOINT

A078

How many years have you lived in [CURRENT RESIDENCE CITY (X025), STATE (X026)]?

[INSTR: IF LESS THAN ONE YEAR, ENTER '1'.]

[INSTR: ENTER '95' IF R SAYS 'ALL MY LIFE'.]

How many years have you lived in [CURRENT RESIDENCE CITY (X025), STATE (X026)]?

[INSTR: IF LESS THAN ONE YEAR, ENTER '1'.]

YEARS [Drop down]

1. ONE YEAR OR LESSS

95. ALL MY LIFE

DK [HIDE]

RF [HIDE]

A072 BRANCHPOINT: GO TO A073 BRANCHPOINT

A072

~~IF R LIVES IN NURSING HOME (A028=1):~~

~~Is your residence still in or around [HH's LAST IW 1ST RESIDENCE CITY, STATE]?~~

#@ AA (6/9/21):

Drop A072;

#48582

~~OTHERWISE:~~

~~Do you still live, all or part of the year, in a residence in or around HH's LAST IW 1ST RESIDENCE CITY, STATE]?~~

~~IF R LIVED IN NURSING HOME (A028=1):~~

~~[Was your/(Was [his/her]/Was their)] residence still in or around HH's LAST IW 1ST RESIDENCE CITY, STATE?~~

~~OTHERWISE:~~

~~[Did you/(Did [he/she]/Did they)] still live, all or part of the year, in a residence in or around HH's LAST IW 1ST RESIDENCE CITY, STATE?~~

~~1. YES~~

~~5. NO~~

~~DK [HIDE]~~

~~RF [HIDE]~~

A073 BRANCHPOINT: IF R DID NOT HAVE SECOND RESIDENCE IN HH's LAST IW (X028Preload_X027 NOT 1), GO TO A075 BRANCHPOINT

#@AA(9/28/22)

B&A_ONLY: fixed typo in BP;

ELSE, IF HH's LAST INTERVIEW SECOND RESIDENCE CITY IS NOT KNOWN (X029=EMPTY), GO TO A075 BRANCHPOINT

A073

Our records also show that [in LAST IW MONTH (per X034), YEAR (per X035)-~~FOR LAST-WAVE'S 1ST R/in LAST IW YEAR FOR LAST-WAVE'S 1ST R~~/two years ago] you had another residence, one in [HH's LAST IW 2ND RESIDENCE CITY (X029), STATE (X030)].

#@AA(9/28/22)B

&A_ONLY:

Removed extra fill text;

IF R IS IN NURSING HOME (A028=1):

Do you still have the same residence in [HH's LAST IW 2ND RESIDENCE CITY, STATE]?

OTHERWISE:

Are you still living, all or part of the year, in that same residence in [HH's LAST IW 2ND RESIDENCE CITY, STATE]?

Our records also show that [in LAST IW MONTH (per X034), YEAR (per X035) ~~FOR~~
~~LAST WAVE'S 1ST R/in LAST IW YEAR FOR LAST WAVE'S 1ST R/two years ago~~] [R's
FIRST NAME] had another residence, one in [HH's LAST IW 2ND RESIDENCE CITY
(X029), STATE (X030).]

IF R LIVED IN NURSING HOME (A028=1):

[Did you/(Did [he/she]/Did they)] still have the same residence in [HH's LAST IW
2ND RESIDENCE CITY, STATE]?

OTHERWISE:

[Were you/(Was [he/she]/Were they)] still living, all or part of the year, in that
same residence in [HH's LAST IW 2ND RESIDENCE CITY, STATE]?

1. YES.....GO TO A075 BRANCHPOINT

5. NO

DK {HIDE}

RF {HIDE}

A074

~~IF R IS IN NURSING HOME (A028=1):~~

~~Do you still have a home in or around HH's LAST IW 2ND RESIDENCE CITY, STATE?~~

#@ AA (6/9/21):

Drop A074;

#48583

~~OTHERWISE:~~

~~Do you still live, all or part of the year in or around HH's LAST IW 2ND RESIDENCE
CITY, STATE?~~

~~IF R LIVED IN NURSING HOME (A028=1):~~

~~[Did you/(Did [he/she]/Did they)] still have a home in or around HH's LAST IW 2ND
RESIDENCE CITY, STATE?~~

~~OTHERWISE:~~

~~[Did you/(Did [he/she]/Did they)] still live, all or part of the year in or around HH's
LAST IW 2ND RESIDENCE CITY, STATE?~~

~~1. YES~~

~~5. NO~~

~~DK {HIDE}~~

~~RF {HIDE}~~

A075 BRANCHPOINT: IF HH's LAST INTERVIEW MAIN RESIDENCE CITY IS NOT KNOWN (X025=EMPTY), CONTINUE ON TO A075

#@ AA (6/9/21):
Drop A072 &
A074; #48582,
#48583

ELSE, IF BOTH CURRENT RESIDENCES ARE {SAME ~~or IN-SAME-AREA~~} AS {1ST and 2ND} RESIDENCES IN HH's LAST IW ({A071 or ~~A072~~} and {A073 or ~~A074~~}=1), GO TO A084 ASSIGNMENT

ELSE, IF ONE CURRENT RESIDENCE IS {SAME ~~or IN-SAME-AREA~~} AS {1ST or 2ND} RESIDENCES IN HH's LAST IW ({A071 or ~~A072~~ or A073 or ~~A074~~}=1), GO TO A079 BRANCHPOINT

A075

[INSTR: ASK IF NECESSARY:

(In what city and state is your residence currently located?).]

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

In what city and state is your residence currently located?

[INSTR: IF YOU ARE NO LONGER LIVING IN THE U.S., SELECT "OTHER COUNTRY" FROM THE BOTTOM OF THE LIST.]

At the time [he/she] (died/passing away), in what city and state was [R's FIRST NAME]'s [and [your/[his/her] [husband's/wife's/partner's]] residence located?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

CITY_____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A169_A0

76

STATE_____ [Drop down]

97. OTHER COUNTRY A077_____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A079 BRANCHPOINT: IF THIS IS THE SECOND R and {~~FAMILY FAM~~ or ~~NON-FINANCIAL & NON-FAMILY NON-FIN/FAM R~~ } (X007= {2 or 4}), GO TO A110 (AFTER A085)

ELSE, IF R LIVES/LIVED IN A NURSING HOME (A028=1) and DID NOT REPORT THAT STILL OWNS HOME OUTSIDE FACILITY (A070 NOT 1), GO TO A110 (AFTER A085)

ELSE, IF HH HAD SECOND RESIDENCE IN HH's LAST INTERVIEW (Preload_X027=1) and HH's LAST INTERVIEW SECOND RESIDENCE CITY IS NOT KNOWN (X029=EMPTY), CONTINUE ON TO A079

ELSE, IF R HAD SECOND RESIDENCE IN HH's LAST IW (Preload_X027=1) and DID NOT REPORT THAT ~~NO LONGER LIVING IN BOTH PREVIOUS WAVE RESIDENCE BOTH CURRENT RESIDENCES ARE IN DIFFERENT AREAS FROM {1ST and 2ND} RESIDENCES IN HH's LAST IW~~ ({A072 A071 and A074- A073} NOT 5), GO TO A084 ASSIGNMENT

#@ SS (7/27/21)
Remove A072
and A074 from
conditions,
DEV#48582,
48583

#@ SS (7/27/21)
Modified
conditions for
A071 and A073
<>5 DEV#48684

A079

IF R LIVES IN NURSING HOME (A028=1):

Do you have any other house or apartment?

OTHERWISE:

Do you have any other house or apartment where you live for 2 or more months of the year?

[INSTR: IF R REPORTS MORE THAN ONE ADDITIONAL RESIDENCE, ASK ABOUT THE ONE THEY USE MOST.]

IF R LIVES IN NURSING HOME (A028=1):

Do you have any other house or apartment?

OTHERWISE:

Do you have any other house or apartment where you live for 2 or more months of the year?

[INSTR: IF YOU HAVE MORE THAN ONE ADDITIONAL RESIDENCE, WE ARE INTERESTED IN THE ONE YOU USE MOST.]

IF R LIVED IN NURSING HOME (A028=1):

[Did you/(Did [he/she]/Did they)] have any other house or apartment?

OTHERWISE:

[Did you/(Did [he/she]/Did they)] have any other house or apartment where [you lived/([he/she] lived/they lived)] for 2 or more months of the year?

[INSTR: IF PROXY REPORTS MORE THAN ONE ADDITIONAL RESIDENCE, ASK ABOUT THE ONE THEY USED MOST.]

1. YES
5. NO.....GO TO ~~A084 ASSIGNMENT~~ A085 BRANCHPOINT
DK ~~[HIDE]~~.....GO TO ~~A084 ASSIGNMENT~~ A085 BRANCHPOINT
RF ~~[HIDE]~~.....GO TO ~~A084 ASSIGNMENT~~ A085 BRANCHPOINT

#@ MM
(9/14/2022) B&A
Only: Moved
A084 Assignment
to appendix

A080

In what city and state is your other residence located?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

In what city and state is your other residence located?

[INSTR: IF YOU ARE NO LONGER LIVING IN THE U.S., SELECT "OTHER COUNTRY"
FROM THE BOTTOM OF THE LIST.]

In what city and state was [your/R's FIRST NAME's] other residence located?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]

CITY _____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A170_A0
81

STATE _____ [Drop down]

97. OTHER COUNTRY A082 _____

DK ~~[HIDE]~~

RF ~~[HIDE]~~

A083 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO A085 BRANCHPOINT

A083

How many years have you lived in or around [HH's CURRENT OTHER RESIDENCE
CITY?

[INSTR: IF LESS THAN ONE YEAR, ENTER "1".]

[INSTR: ENTER "95" IF R SAYS "ALL MY LIFE".]

How many years have you lived in or around [HH's CURRENT OTHER RESIDENCE
CITY?

[INSTR: IF LESS THAN ONE YEAR, ENTER "1".]

NUMBER OF YEARS _____

95. ALL MY LIFE

DK ~~{HIDE}~~

RF ~~{HIDE}~~

NOTE: SEE APPENDIX (SECTION 7. Current Main Residence (Re)Assignment) FOR MORE DETAILS.

A085 BRANCHPOINT: IF R HAS ONLY ONE RESIDENCE (A084=1), GO TO A110 (AFTER A085)

A085

Which is your main residence, your home in [HH's LAST IW [1ST RESIDENCE/~~2ND RESIDENCE~~] CITY, STATE/NEW CURRENT RESIDENCE CITY, STATE] or your home in HH's [LAST IW 2ND RESIDENCE CITY, STATE/NEW OTHER RESIDENCE CITY, STATE]? #@AA(9/28/22)B
&A_ONLY: fixed
fill and fixed exit
def;

DEFINITION: By "main residence" we mean the one where you spend the most time (MTY)

Which is your main residence, your home in [HH's LAST IW [1ST RESIDENCE/~~2ND RESIDENCE~~] CITY, STATE/NEW CURRENT RESIDENCE CITY, STATE] or your home in HH's [LAST IW 2ND RESIDENCE CITY, STATE/NEW OTHER RESIDENCE CITY, STATE]?

DEFINITION: By "main residence" we mean the one where you spend the most time

Which was [R's FIRST NAME]'s main residence, the home in HH's [LAST IW [1ST RESIDENCE/~~2ND RESIDENCE~~] CITY, STATE]/NEW CURRENT RESIDENCE CITY, STATE] or the one in HH's [LAST IW 2ND RESIDENCE CITY, STATE/NEW OTHER RESIDENCE CITY, STATE]?

DEFINITION: ~~Main residence is the one where R spent the most time (MTY)~~ By "main residence" we mean the one where you spend the most time (MTY)

1. HOME IN [LAST IW 1ST RESIDENCE CITY (X026)]
2. HOME IN [NEW CURRENT RESIDENCE CITY, STATE (A075)/First home mentioned]
3. HOME IN [LAST IW 2ND RESIDENCE CITY (X029)]
4. HOME IN [NEW OTHER RESIDENCE CITY, STATE (A080)/Other home mentioned]

DK ~~{HIDE}~~

RF ~~{HIDE}~~

A110

[INSTR: R HOUSING CONFIRM.]

[INSTR: ~~PRESS 1~~ SELECT CONTINUE TO CONFIRM R HOUSING LOCATIONS ARE FINISHED.]

IF THIS IS THE SECOND R (SCVXR1_R2=2) and THE NON-FAMILY R (X007 {NOT 2 and NOT 3}):

RESPONDENT: NON FAMILY R

[INSTR: THE GRIDS WILL NOT APPEAR FOR NON-FAMILY RESPONDENTS. PRESS 1 TO PROCESS THROUGH SECTION A.]

IF THIS IS THE SECOND R and THE FAMILY R (X007 = {2 or 3}):

RESPONDENT: FAMILY R

NOTE: IF THIS IS A SECOND R THE SCREEN DISPLAYS WHETHER A FAMILY OR NON-FAMILY R IS BEING INTERVIEWED. THE INSTR INSTRUCTION BELOW "RESPONDENT: NON FAMILY R" APPEARS ONLY FOR THAT R.

Now we're ready to move on to the next topic.

[INSTR: PLEASE SELECT THE "NEXT" BUTTON TO PROCEED.]

[INSTR: R HOUSING CONFIRM.]

[INSTR: ~~PRESS 1~~ SELECT CONTINUE TO CONFIRM R HOUSING LOCATIONS ARE FINISHED.]

IF THIS IS THE SECOND R (SCVXR1_R2=2) and THE NON-FAMILY R (X007 {NOT 2 and NOT 3}):

RESPONDENT: NON FAMILY R

[INSTR: THE GRIDS WILL NOT APPEAR FOR NON-FAMILY RESPONDENTS. PRESS 1 TO PROCESS THROUGH SECTION A.]

IF THIS IS THE SECOND R and THE FAMILY R (X007 = {2 or 3}):

RESPONDENT: FAMILY R

NOTE: IF THIS IS A SECOND R THE SCREEN DISPLAYS WHETHER A FAMILY OR NON-FAMILY R IS BEING INTERVIEWED. THE INSTR INSTRUCTION BELOW "RESPONDENT: NON FAMILY R" APPEARS ONLY FOR THAT R.

1. CONTINUE

~~NOTE: '1. CONTINUE' IS ONLY ACCEPTABLE RESPONSE.~~

#@ MM
(9/14/2022) B&A
Only: Removed
Note

End housing location and residence questions