HEALTH AND RETIREMENT STUDY
2022 Core
Early, Version 3.0

February 2025

Data Description and Usage

Conditions of Use

By registering for access to HRS Public Release data, the User agrees to all of the following:

- Make no attempts to identify study participants.

- Not to transfer HRS Public Release data to any third party other than staff or students for whom you are directly responsible except as indicated below.

- Not to allow others to use your username and password to access this site.

- To certify the destruction of any downloaded Public Release data file as well as any data files derived from the downloaded file when requested to do so by the Health and Retirement Study.

- To include the following citation in any research reports, papers, or publications based on Public Release data:

In text:
"The HRS (Health and Retirement Study) is sponsored by the National Institute on Aging (grant number NIA U01AG009740) and is conducted by the University of Michigan."

In references:
"Health and Retirement Study, 2022 HRS Early Core public use dataset. Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA U01AG009740). Ann Arbor, MI, (year)."

- To include the following citation in any research reports, papers, or publications based on any Public Release data file tagged as "Early" or "Preliminary":

"This analysis uses Early Release data from the Health and Retirement Study, 2022 HRS Early Core, sponsored by the National Institute on Aging (grant number NIA U01AG009740) and conducted by the University of Michigan. These data have not been cleaned and may contain errors that will be corrected in the Final Public Release version of the dataset."

- Please note that although it is necessary to include the above citations to the HRS in any publications, it is not necessary to associate your publications with the HRS grant in PubMed.

- Provide information regarding any research product (dissertation, thesis, journal article, book, book chapter, report, etc.) based on data obtained from the Health and Retirement Study by sending an electronic copy to hrspublications@umich.edu.

- Report immediately to the Health and Retirement Study at hrsquestions@umich.edu any disclosure of study participant identity as well as any discovery of flaws or errors in the data or documentation files.

- Notify the Health and Retirement Study through use of the update function provided at this site or by electronic mail directed to hrsquestions@umich.edu of changes in your electronic mail address, postal address, telephone number, organizational affiliation or organizational status.

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Data Description and Usage

1. Overview

The 2022 HRS Core (Early, Version 3.0) data release consists of data obtained as part of the Health and Retirement Study (HRS), a national longitudinal study of the economic, health, marital, and family status, as well as public and private support systems, of older Americans. The National Institute on Aging provided funding (NIA U01 AG009740), with supplemental support from the Social Security Administration. The Institute for Social Research (ISR) Survey Research Center (SRC) at the University of Michigan conducted the survey.

The 2022 HRS Core (Early, Version 3.0) is an early public release that includes cases from the seven continuing HRS cohorts (HRS, AHEAD, CODA, WAR BABY, EARLY BABY BOOMER, MID BABY BOOMER and LATE BABY BOOMER) and the newly screened EARLY GENERATION X (EGENX) cohort respondents who had completed an interview by December 31, 2023. HRS early data releases are provided for users who wish to begin analyzing data prior to a final public release being available. Early release files have undergone a fair amount of data cleaning, but errors may be present in the data files and/or the associated codebooks.

By receiving the data, which have been freely provided, you agree to use them for research and statistical purposes only and to make no effort to identify the respondents. In addition, you agree to send us a copy of any publications you produce based on the data. See Obtaining the Data for additional details.

1A. The Sample Interviewed in 2022

The data collection period pertaining to this public release was March 2022 through December 2023. The HRS sample is comprised of eight sub-samples (HRS, AHEAD, CODA, WAR BABY, EARLY BABY BOOMER, MIDDLE BABY BOOMER, LATE BABY BOOMER and EARLY GEN X).

The first sub-sample, the HRS sub-sample, consists of people who were born 1931 through 1941 and were household residents of the conterminous U.S. in the spring 1992, and their spouses or partners at the time of the initial interview in 1992 or at the time of any subsequent interview. The HRS sub-sample was interviewed in 1992 and every two years thereafter.

The AHEAD sub-sample consists of people who were born in 1923 or earlier, were household residents of the conterminous U.S. in the spring 1992, and were still household residents at the time of their first interview in 1993 or 1994, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The AHEAD sub-sample was interviewed in 1993-94, 1995-96, 1998 and every two years thereafter.

The Children of the Depression (CODA) sub-sample consists of people who were born in 1924 through 1930, were household residents of the conterminous U.S. when first interviewed in 1998, and who, at that time, did not have a spouse or partner who was born before 1924 or between 1931 and 1947, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Children of the Depression sub-sample was interviewed in 1998 and every two years thereafter.

The War Baby (WB) sub-sample consists of people who were born in 1942 through 1947, were household residents of the conterminous U.S. in the spring 1992, who,

at that time, did not have a spouse or partner born before 1924 or between 1931 and 1941, and were still household residents at the time of the first interview in 1998, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The War Baby sub-sample was interviewed in 1998 and every two years thereafter.

The Early Baby Boomer (EBB) sub-sample consists of people who were born in 1948 through 1953, were household residents of the U.S. when first interviewed in 2004, and who, at that time, did not have a spouse or partner who was born before 1948, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Early Baby Boomer sub-sample was interviewed in 2004 and every two years thereafter.

The Mid Baby Boomer (MBB) sub-sample consists of people who were born between 1954 and 1959, were household residents of the U.S. when first interviewed in 2010/2011, and who, at that time, did not have a spouse or partner who was born before 1954, along with their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Middle Baby Boomer sub-sample was interviewed in 2010/2011 and every two years thereafter.

Both the EBB and MBB sub-samples were supplemented in the 2010 wave with a sample of individuals residing in areas with 10% or higher concentrations of Black and/or Hispanic populations in order to boost the size of the minority samples in those cohorts.

The Late Baby Boomer (LBB) sub-sample consists of people who were born in 1960-1965, were household residents of the U.S. when first interviewed in 2016, and who, at that time, did not have a spouse or partner who was born before 1959, along with their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Late Baby Boomer sub-sample was interviewed in 2016 and will be interviewed every two years thereafter.

The newly screened Early Generation X (EGENX) sub-sample consists of people who were born between 1965 and 1970 and whose household was first interviewed in 2022 or 2023. The EGENX sub-sample was interviewed in 2022/2023 and will be interviewed every two years thereafter.

Original sample members are those selected as described above and their spouses or partners at the time of the initial interview in 1992 (HRS), 1993 (AHEAD), 1998 (CODA or WB), 2004 (EBB), 2010/2011 (MBB), 2016 (LBB) or 2022 (EGENX). For more details about the sample, see our [Web site]().

1B. 2022 Questionnaire Sections

2022 Section	Content
PR	Preload
A	Coverscreen
B	Demographics
C	Physical Health
D	Cognition
E	Family Structure
F	Parents, Siblings and Transfers
G	Functional Limitations and Helpers
H	Housing
I	Physical Measures and Biomarkers
J	Employment
J2	Pensions

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J3              Retirement and Social Security
M               Disability
N               Health Services and Insurance
P               Expectations
Q               Assets and Income
R               Asset Change
S               Widowhood and Divorce
T               Wills and Life Insurance
V               Modules
W               Event History, Internet Use and Social Security
Y               Time Calculations
IO              Interviewer Observations
LB              Leave-Behind Questionnaires
TN              Thumbnails
```

1C. Levels of Files

In the 2022 data collection instrument, most questions were asked of all respondents. Some questions were asked about the household. For two-respondent households, household level questions were asked of one respondent who was designated as the financial respondent, family respondent, or coverscreen respondent (the first respondent interviewed) on behalf of the entire household.

In addition to the familiar household-level and respondent-level files, the 2022 HRS Core (Early, Version 3.0), contains files at seven other levels: household-member-and-child, sibling, helper, transfer-to-child, transfer-from-child, jobs, and pension.

1C1. Household Level Files

Household-level files contain questions that were asked about the household of a designated coverscreen, financial, or family respondent. A coverscreen respondent answered family questions (section A) on behalf of the entire household; the coverscreen respondent may or may not be the family respondent. A family respondent answered family questions (section E) on behalf of the entire household, and a financial respondent answered household-level financial questions (sections H, Q, R and U) on behalf of the entire household. The household-level files contain one record for each household in which at least one interview was obtained in 2022.

1C2. Respondent Level Files

Respondent-level files contain questions that were asked of all respondents about themselves (or asked of a proxy about the respondent if the respondent was not able to give an interview). The files contain one record for each respondent or proxy who gave an interview in 2022.

1C3. Sibling Level File

The sibling-level file consists of characteristics of the respondent's siblings. If a respondent had at least one living parent, he/she was asked a variety of questions about his/her siblings (Section F). The sibling file contains one record for each sibling of a respondent. Each respondent reports on his/her own parents and siblings. Sibling data are also stored in the preload section, H22PR_SB.

1C4. Household Member and Child Level Files

Household-member-and-child-level-files contain characteristics about household members and children. This information can come from Section A. (coverscreen) or the family respondent in Section E and also in the preload section.

1C5. Helper Level File
The helper-level file contains information provided by each respondent about helpers. A helper may be a person or organization that was reported by the respondent as providing help with Activities of Daily Living (ADLs) or Instrumental Activities of Daily Living (IADLs). The file contains one record for each helper. If a child helped both respondents in a two respondent household, the helper file will contain two records – one of mother's report of the child's helping her and one for father's report of the child's helping him.

1C6. Transfer-to-Child-Level File
The transfer-to-child-level file contains information provided by the family respondent about transfers of money to a child or grandchild. The file contains one record for each transfer to a child or grandchild.

1C7. Transfer-from-Child-Level-File
The transfer-from-child-level file contains information provided by the family respondent about transfers of money from a child or grandchild. The file contains one record for each transfer from a child or grandchild.

1C8. Pension Level Files
Pension-level files contain information about pensions that the respondent has reported over the years during their involvement with the HRS. Each file contains one record for each pension that has been reported and followed up on in the current data collection.

1C9. Jobs level files
Job-level files contain information on jobs the respondent has reported over time. Current jobs are represented, as well as past employment with unresolved pensions from past waves. The files have one record for each job represented.

2. File Naming Conventions
Files are named beginning with "H22" for HRS 2022, followed by a letter (or two) designating the questionnaire section. A separator, "_" and then one or two letters designating the level follows the section letter designator.

```
 H for household-level
 R for respondent-level
MC for household-member-and-child-level
SB for sibling-level
HP for helper-level
TC for transfer-to-child-level
FC for transfer-from-child-level
JB for jobs-level
 P for pension-level
```

For example, the file H22A_R includes variables from Section A (coverscreen) at the respondent level, whereas, H22A_H contains variables from Section A (coverscreen) at the household level.

The following extensions are used for the six different types of files that are distributed.

```
.da for data files,
.sas for SAS program statements,
.sas7bdat for "ready-to-use" SAS files,
```

```
    .sps for SPSS program statements,
    .sav for "ready-to-use" SPSS files,
    .do for Stata DO statements,
    .dct for Stata dictionary statements,
    .dta for "ready-to-use" Stata files, and
    .txt for codebook files.
```

One of each of these file types is provided for each of the 38 data files for
the 2022 HRS Core (Early, Version 3.0) data release. For example,

```
    H22A_R.da contains respondent data from Section A,
    H22A_R.sas contains corresponding SAS program statements,
    H22A_R.sas7bdat contains "ready-to-use" data in SAS format
    H22A_R.sps contains corresponding SPSS program statements,
    H22A_R.sav contains "ready-to-use" data in SPSS format
    H22A_R.do contains corresponding Stata DO statements,
    H22A_R.dct contains corresponding Stata dictionary statements,
    H22A_R.dta contains "ready-to-use" data in Stata format, and
    H22A_R.txt contains the ASCII codebook.
```

3. Data Files

The 2022 HRS Core (Early, Version 3.0) data are distributed in 38 data files.
The files are listed below along with the number of cases (#CASES), number of
variables (#VARS), and the primary identifiers (IDs). The records in the data
files are sorted in order by these primary identifiers.

The 2022 HRS Core data are provided in ASCII format, with fixed-length records.
Use associated SAS, SPSS or Stata program statements to read the data into the
analysis package of your choice.

FILENAME	# CASES	# VARS	FILE LEVEL	IDs
H22A_H	11923	47	household	HHID, SSUBHH
H22E_H	11923	120	household	HHID, SSUBHH
H22H_H	11923	250	household	HHID, SSUBHH
H22IO_H	11923	55	household	HHID, SSUBHH
H22PR_H	11923	46	household	HHID, SSUBHH
H22Q_H	11923	752	household	HHID, SSUBHH
H22R_H	11923	115	household	HHID, SSUBHH
H22A_R	15856	38	respondent	HHID, PN, SSUBHH
H22B_R	15856	89	respondent	HHID, PN, SSUBHH
H22C_R	15856	245	respondent	HHID, PN, SSUBHH
H22D_R	15856	293	respondent	HHID, PN, SSUBHH
H22F_R	15856	188	respondent	HHID, PN, SSUBHH
H22G_R	15856	155	respondent	HHID, PN, SSUBHH
H22I_R	15856	190	respondent	HHID, PN, SSUBHH
H22IO_R	15856	69	respondent	HHID, PN, SSUBHH
H22J_R	15856	650	respondent	HHID, PN, SSUBHH
H22J3_R	15856	184	respondent	HHID, PN, SSUBHH
H22LB_R	15856	470	respondent	HHID, PN, SSUBHH

FILENAME	# CASES	# VARS	FILE LEVEL	IDs
H22M_R	15856	284	respondent	HHID, PN, SSUBHH
H22N_R	15856	378	respondent	HHID, PN, SSUBHH
H22P_R	15856	38	respondent	HHID, PN, SSUBHH
H22PR_R	15856	176	respondent	HHID, PN, SSUBHH
H22S_R	15856	115	respondent	HHID, PN, SSUBHH
H22T_R	15856	114	respondent	HHID, PN, SSUBHH
H22TN_R	15856	20	respondent	HHID, PN, SSUBHH
H22V_R	15856	114	respondent	HHID, PN, SSUBHH
H22W_R	15856	18	respondent	HHID, PN, SSUBHH
H22Y_R	15856	32	respondent	HHID, PN, SSUBHH
H22E_FC	1084	24	transfer-from-child	HHID, SSUBHH
H22E_TC	5169	25	transfer-to-child	HHID, SSUBHH
H22G_HP	4495	32	helper	HHID, PN, OPN
H22PR_P	6656	17	pension	HHID, PN, Pension ID
H22J2_P	8555	184	pension	HHID, PN, Pension ID
H22PR_JB	21751	16	jobs	HHID, PN, JOBID
H22E_MC	52474	30	household member and child	HHID, SSUBHH, OPN
H22PR_MC	61559	26	household member and child	HHID, SSUBHH, OPN
H22F_SB	15837	30	sibling	HHID, PN, OPN
H22PR_SB	15837	16	sibling	HHID, PN, OPN

3A. Construction of the Interviewer Observation Files (IO_R and IO_H).
The interview observations can have many entries for each sample ID. In order to
create the release files we use the following guidelines:

IO_R: we first look for the lines are taken from a completed interview (result
code = 1001). If there is no such data for a given Sample ID, we then take the
last observation recorded for that sample ID.

IO_H: is a little more complicated, as the most important factor for the
Household level file is the housing observations, which can be recorded at any
time. For each HH, we look for the first and most complete set of housing
observation questions for the household, as it could have been recorded on the
line of either respondent. We use that record for the Household Level
observation file.

4. Identification Variables
Identification variables for HRS 2022 are stored in character format.

4A. Primary Identification Variables
Several variables, HHID, SSUBHH, PN, OPN, are used in various combinations to
uniquely identify the nine different level datasets that comprise this data
release.

4A1. HHID – Household Identification Number
In the initial wave of data collection (in 1992 for the HRS sub-sample, in 1993 for the AHEAD sub-sample, 1998 for the WB and CODA sub-samples, 2004 for the EBB sub-sample, 2010/2011 for the MBB sub-sample and 2016 for the LBB sub-sample), each sample household was assigned a Household Identifier. HHID is stable across waves of data collection and uniquely identifies the original household and any households derived from that household in subsequent waves of data collection. HHID has six-digits.

4A2. SSUBHH – 2022 Sub-household Identifier
In combination with HHID, SSUBHH uniquely identifies a household at the time of the 2022 data collection. Sub-household identifiers can be different at each wave. RSUBHH has one-digit. For more information, see Examples of Sub-Household and Respondent Person Number and Other Person Number Assignments.

4A3. PN – Person Number
In combination with HHID, PN uniquely identifies a respondent or respondent's spouse or partner. PNs are unique within an original household (HHID). The PN assigned to a particular respondent does not change across waves. PN has three-digits.

4A4. OPN – Other Person Number.
In the 2022 data collection HHID, SSUBHH and OPN uniquely identify another person in the household member and child files; HHID, PN, and OPN uniquely identify another person in the helper or sibling files. OPN has three-digits.

4B. Primary Identification Variables for Datasets at Each of the Nine Levels
Two identifiers uniquely identify records in the
   o respondent-level datasets:
     1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
     2) PN   RESPONDENT PERSON IDENTIFICATION NUMBER

Two identifiers uniquely identify records in the
   o household-level datasets:
     1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
     2) SSUBHH   2022 SUB HOUSEHOLD IDENTIFICATION NUMBER

Three identifiers uniquely identify records in the
   o helper-level datasets:
     1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
     2) PN   RESPONDENT PERSON IDENTIFICATION NUMBER
     3) OPN   OTHER PERSON NUMBER

Three identifiers uniquely identify records in the
   o household-member-and-child-level:
     1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
     2) SSUBHH   2022 SUB HOUSEHOLD IDENTIFICATION NUMBER
     3) OPN   OTHER PERSON NUMBER

Three identifiers uniquely identify records in the
   o sibling-level datasets:
     1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
     2) PN   RESPONDENT PERSON IDENTIFICATION NUMBER
     3) OPN   OTHER PERSON NUMBER

Three identifiers uniquely identify records in the

o   transfer-to-child-level, and
        o   transfer-from-child-level datasets:
            1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
            2) SSUBHH   2022 SUB HOUSEHOLD IDENTIFICATION NUMBER
            3) OPN   OTHER PERSON NUMBER

Three identifiers uniquely identify records in the
        o   Pension Level Data sets
            1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
            2) PN   RESPONDENT PERSON IDENTIFICATION NUMBER
            3) Z505   PENSION TRACKING NUMBER

Three identifiers uniquely identify records in the
        o   Jobs level datasets:
            1) HHID   HOUSEHOLD IDENTIFICATION NUMBER
            2) PN   RESPONDENT PERSON IDENTIFICATION NUMBER
            3) Z504   JOB TRACKING NUMBER

4C. Secondary Identification Variables

In addition to the primary identification variables that uniquely identify
records in a dataset, secondary identification variables that allow links to
other datasets are provided. Two sets of secondary identification variables are
provided. They are listed below.

Secondary Identification Variables for
        o   respondent-level datasets
        o   sibling level datasets
        o   helper-level datasets
        o   job-level datasets and
        o   Pension-level datasets

            SSUBHH   2022 SUB HOUSEHOLD IDENTIFICATION NUMBER
            RSUBHH   2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
            SPN_SP   2022 SPOUSE/PARTNER PERSON NUMBER
            SCSR   2022 WHETHER COVERSHEET RESPONDENT
            SFAMR   2022 WHETHER FAMILY RESPONDENT
            SFINR   2022 WHETHER FINANCIAL RESPONDENT

Secondary Identification Variables for
        o   household level datasets
        o   household member or child level datasets
        o   transfer-from-child-level datasets and
        o   transfer-to-child-level datasets

            SSUBHH   2022 SUB HOUSEHOLD IDENTIFICATION NUMBER
            RSUBHH   2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
            OPN_CS   PERSON NUMBER OF COVER SCREEN RESPONDENT
            SPN_FAM   2022 FAMILY RESP PERSON NUMBER
            SPN_FIN   2022 FINANCIAL RESP PERSON NUMBER
            SPN_NCS   2022 NON-COVERSCREEN RESP PERSON NUMBER
            SPN_NFAM   2022 NON-FAMILY RESP PERSON NUMBER
            SPN_NFIN   2022 NON-FINANCIAL RESP PERSON NUMBER

4D. Datasets Including SSUBHH and OPN as Primary Identifiers

When working with datasets including SSUBHH and OPN as primary identifiers --
household-member-and-child-level, it is essential to use SSUBHH to distinguish
other persons.

Sometimes records with the same HHID and OPN will be separate reports about the same person. For example, Couple with Children and Siblings Divorces, the record where HHID is 890121, SSUBHH is 1, and OPN is 101 is the report about the child from the mother, and the record where HHID is 890121, SSUBHH is 2, and OPN is 101 is the report about the same child from the father.

At other times records with the same HHID and OPN will be reports about different persons. For example, a couple divorces, one respondent remarries, and both split-off households have new members. When a couple divorces and both split-off households have new members, the record where HHID is 871231, SSUBHH is 2, and OPN is 151 is for the ex-wife's mother, while the record where HHID is 871231, SSUBHH is 1, and OPN is 151 is for the ex-husband's new stepchild.

5. Distribution Files and Directory Structure

5A. Distribution Files
The files are packaged for download from our Web site in two different ways – as one large .zip file that contains six smaller .zip files, one .pdf file, and one .txt file, or the six smaller files available individually for separate download. The combined file is H22core.zip.

The individual .zip files for separate download are:
    ASCII data files
        H22da.zip contains data files.

    Program statements and "ready-to-use" files
        H22sas.zip contains SAS program statements (.sas) and "ready-to-use" files (.sas7bdat)
        H22sps.zip contains SPSS program statements (.sps) and "ready-to-use" files (.sav)
        H22sta.zip contains Stata program statements (.do), dictionary statements (.dct) and "ready-to-use" files (.dta)

    Documentation files
        H22cb.zip contains the codebook.
        H22qn.zip contains the questionnaire.
        H22dd.pdf - this document.

5B. Directory Structure
While a particular setup is not required for using HRS files, we have traditionally suggested a directory structure. By using this directory structure, you will not have to change the path name in your program statement files. If you use a different structure, just change the directory references in the program statement files.

Directory	Contents
c:\hrs2022	Files downloaded from Web site
c:\hrs2022\codebook	Unzipped files from H22cb.zip
c:\hrs2022\data	Unzipped files from H22da.zip
c:\hrs2022\qnaire	Unzipped files from H22qn.zip
c:\hrs2022\sas	Unzipped files from H22sas.zip
c:\hrs2022\spss	Unzipped files from H22sps.zip
c:\hrs2022\stata	Unzipped files from H22sta.zip

Decompress the selected .zip files into the appropriate subdirectories.

6. Program Statements

Each data file comes with associated SPSS, SAS, or Stata program statements to read the data. Files containing SPSS statements are named with .SPS extension, those with SAS statements with a .SAS extension, and those with Stata statements with .DO and .DCT extensions.

The statement files are named beginning with the same prefix as the corresponding data file. For example, SAS statements in the file H22A_R.SAS go with the H22A_R.DA data file.

6A. Using the Files with SAS
To create a SAS system file for a particular dataset, two file types must be present for that dataset -- .SAS program statement files and .DA data files.

To create a SAS system file, load the *.SAS file into the SAS Program Editor.

If the *.SAS file is located in "c:\hrs2022\sas" and the data file is located in "c:\hrs2022\data", you can run the file as is. A SAS system file (*.SD2 or *.SAS7BDAT) will be saved to directory "c:\hrs2022\sas".

If the files are not located in the specified directories, you will need to edit the *.SAS file to reflect the proper path names prior to running the file.

6B. Using the Files with SPSS
To create an SPSS system file for a particular dataset, two file types must be present for that dataset -- .SPS program statement files and .DA data files.

To create an SPSS system file, open the *.SPS file in SPSS as an SPSS Syntax File.

If the *.SPS file is located in "c:\hrs2022\spss" and the data file is located in "c:\hrs2022\data", you can run the file as is. An SPSS system file (*.SAV) will be saved to directory "c:\hrs2022\spss".

If the files are not located in the specified directories, you will need to edit the *.SPS file to reflect the proper path names prior to running the file.

6C. Using the Files with Stata
To use Stata with a particular dataset, the following three file types must be present for that dataset -- .DCT files, .DO files, and .DA data files.

Files with the suffix .DA contain the raw data for Stata to read. Files with the suffix .DCT are Stata dictionaries used by Stata to describe the data. Files with the suffix .DO are short Stata programs ("do files") which you may use to read in the data. Load the .DO file into Stata and then submit it.

If the *.DO and *.DCT files are located in "c:\hrs2022\Stata" and the data file is located in "c:\hrs2022\data", you can run the .DO file as is.

If the files are not located in these directories, you must edit the *.DO and *.DCT files to reflect the proper path names before you run the files.

Note that the variable names provided in the .DCT files are uppercase. If you prefer lower case variable names, you may wish to convert the .DCT files to lower case prior to use. You may do this by reading the .DCT file into a text or word processing program and changing the case. For instance in Microsoft Word, Edit, Select All, Format, Change Case, lowercase.

7. Loading HRS Data Products in a Non-Windows Environment

All files released by The Health and Retirement Study are created in a Windows environment. This means that non-Microsoft users will need to modify the default Windows file structure syntax to match that of their own operating system. The instructions in this section provide advice on how to make these changes.

7A. Working in an OS X Environment

The following examples should work for both Macintosh OS X and any Unix/Linux distribution. Open the SAS program file(s), SPSS syntax file(s) or the Stata do/dct files in an ASCII editor and make the changes indicated below.

Important items for Mac OS X users to consider:
1. Use *Stuffit* instead of *Archive Utility* to decompress the downloaded zip file into a desktop folder.
2. When using the Apple ASCII text editor (*TextEdit*), select *Preferences* and make these changes…
   - Under Format, select *Plain text*
   - Under Options, uncheck
     - o *Smart quotes*
     - o *Smart dashes*

   Better yet, install and use *TextWrangler*

7A1. OS X: SPSS

In this example, we assume that the user has downloaded the 2022 tracker dataset and placed the files in a **Desktop** folder called **trk2022** with the ASCII data file (.da) stored in subfolder **data** and the syntax file (.sps) in subfolder **spss**. The commands in the syntax file(s) should be modified to look like this:

```
FILE HANDLE trk2022TR_R /name='~/Desktop/trk2022/data/TRK2022TR_R.da'
LRECL=221.
DATA LIST FILE= trk2022TR_R /
HHID 1-6(A)
```
[rest of syntax file goes here]
```
.
execute.
SAVE /outfile '~/Desktop/trk2022/spss/TRK2022TR_R.sav'.
Execute.
```

7A2. OS X: Stata

In the following example we assume that the user has downloaded the 2022 tracker dataset and placed the files in a **Desktop** folder called **trk2022** with the ASCII data file (.da) stored in subfolder **data** and the syntax files (.do/.dct) in subfolder **stata**. Next step is to modify the .do and .dct files in the stata folder:

File TRK2022TR_R.do:
Change from…
```
        infile using c:\trk2022\stata\TRK2022TR_R.dct
```
   To…
```
        infile using ~/Desktop/trk2022/stata/TRK2022TR_R.dct
```

Change from…
```
        save c:\trk2022\stata\TRK2022TR_R.dta
```
   To…
```
        Save ~/Desktop/trk2022/stata/TRK2022TR_R.dta
```

File TRK2022TR_R.dct:
Change from…
```
dictionary using c:\trk2022\data\TRK2022TR_R.da {
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"
column(7) str3 PN %3s "PERSON NUMBER"


                [additional dictionary statements]

}
```
To…
```
dictionary using ~/Desktop/trk2022/data/TRK2022TR_R.da {
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"
column(7) str3 PN %3s "PERSON NUMBER"


                [additional dictionary statements]
```

7B. Working in a Linux Environment

7B1. Linux: Stata
In the following system file build example we assume that the user (user1) has
downloaded the 2022 tracker dataset and placed the files in a folder called
trk2022 (/home/user1/trk2022), with the ASCII data file (.da) stored in
subfolder **data** (/home/user1/trk2022/data) and the syntax files (.do/.dct) in
subfolder **stata** (/home/user1/trk2022/stata).

This process is very similar to the OS X example shown above. The main
difference is that the file/folder structure will be somewhat different when he
.do and .dct files in the stata folder are modified.

File TRK2022TR_R.do:
Change from…
```
            infile using c:\trk2022\stata\trk2022tr_r.dct
```
To…
```
            infile using /home/user1/trk2022/stata/trk2022tr_r.dct
```

Change…
```
            save c:\trk2022\stata\TRK2022TR_R.dta
```
To…
```
            Save /home/user1/trk2022/stata/trk2022tr_r.dta
```

File TRK2022TR_R.dct:
Change from…
```
dictionary using c:\trk2022\data\trk2022tr_r.da {
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"
column(7) str3 PN %3s "PERSON NUMBER"


                [additional dictionary statements]

}
```
To…
```
dictionary using /home/user1/trk2023/data/trk2022tr_r.da {

column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"
column(7) str3 PN %3s "PERSON NUMBER"


                [additional dictionary statements]
}
```

7B2. Linux: SAS
In the following examples we assume that the user (user1) is working in a folder
named **saswork** (/home/user1/saswork), and is creating a SAS version of HRS
products in a separate sub-folders (e.g./home/user1/saswork/2022/sas).

Building SAS system files (One Section)

In the following example we assume that the user has downloaded the 2022 tracker
dataset and placed the files in a folder called trk2022
(/home/user1/saswork/trk2022) with the ASCII data file (.da) stored in subfolder
data (/home/user1/saswork/trk2022) and the syntax file (.sas) in subfolder **sas**
(/home/user1/saswork/trk2022/sas). Next step is to modify trk2022tr_r.sas to
match the folder structure:

In file trk2022tr_r.sas:
Change from…
```
      LIBNAME trk2022 'c:\trk2022\sas\';
      DATA trk2022.trk2022tr_r;
      INFILE 'c:\trk2022\data\trk2022tr_r.da' LRECL = 1028;
```
To…
```
      LIBNAME trk2022 '/home/user1/saswork/trk2022/sas/ ';
      DATA trk2022.trk2022tr_r;
      INFILE '/home/user1/saswork/trk2022/trk2022tr_r.da' LRECL = 1028;
```

When the SAS file is run, it will create file trk2022tr_r.sas7bdat in folder
      /home/user1/saswork/trk2022/sas/.

Building SAS system files (Multiple Sections)

In the following example we assume that the user has downloaded the HRS 2022
Core dataset and placed the files in a folder called hrs2022
(/home/user1/saswork/hrs2022) with the ASCII data files (H22{sec}_{lvl}.da)
stored in subfolder **data** (/home/user1/saswork/hrs2022/data) and the syntax files
(H22{sec}_{lvl}.sas) in subfolder **sas** (/home/user1/saswork/hrs2022/sas).

Important: Begin by modifying each syntax file as follows:

Change all occurrences of...
```
      LIBNAME H2222 'c:\hrs2022\sas\';
```
To...
```
      LIBNAME H2222 '/home/user1/saswork/hrs2022/sas/';
```

Change the INFILE statement in each .sas file from...
```
      INFILE 'c:\hrs2022\data\H22{sec}_{lvl}.da' LRECL = nnn;
```
To...
```
      INFILE '/home/user1/saswork/hrs2022/data/H22{sec}_{lvl}.da' LRECL=nnn;
```

Example
```
      INFILE '/home/user1/saswork/hrs2022/data/H22A_H.da' LRECL=87;
```

8. Documentation

There are several types of documentation available for use with the 2022 HRS
Core (Early, Version 3.0) data release. These include a codebook and the 2022
box-and-arrow questionnaire. In addition, 2022 variables have been added to the
Online Concordance.

8A. Codebook
The HRS 2022 Codebook is provided as a series of 38 ASCII text files, as well as a file containing all sections. There is a codebook file corresponding to each data file. Each variable has its own codebook entry. The format of the codebook is, for the most part, consistent with all previous releases.

8A1. Variable Names
Variable names begin with a letter designating the wave of data collection (S for 2022), followed by the section letter, and numbers after the section letter. For example, SC001 where S=2022, C=section C (physical health), and 001 is the variable number. Variables from the preload section of the instrument will have either QX or QZ as prefix letters. The X indicates a variable that is updated by data collected in later sections of the questionnaire, whereas the Z indicates preloaded data that were not changed by subsequent answers to questions. For example:

```
SX007_R    RESP FAM/FIN TYPE – UPDATED
SZ077_R    PREV WAVE R FIN/FAM TYPE
```

SX007_R indicates that the preloaded Financial or Family respondent was changed, or updated, later in the instrument from what had been preloaded (or assigned) prior to the start of the 2022 interview.

8A1a. Multiple-response and Looped Variables
There are two types of variables with multiple mention indicators. First are simple multiple mentions and second are multiple mentions within loops.

Simple multiple mention variables take the form: (wave prefix) + (section letter) + (variable number) + (mention number). For example, SN219M1 through SN219M5 are 2022 variables from section N with one through 5 mentions.

Variable names for multiple mentions to questions within a loop take the form: (wave prefix) + (section letter) + (variable number) + (underscore) + (loop iteration) + (letter designating mention number). For example, SN049_1M1, is a 2022 variable from section N, variable number 049 in the first iteration of the loop, and the first mention.

Simple loop variables (not a multiple mention) have an underscore (_)in their name and a suffix that designates the loop, e.g., SN025_1.

For variables that have a "W" right after the section designator, the variable names are slightly different. Variable names for multiple mentions to questions within a W-loop take the form: (wave prefix) + (section letter) + ("W") + (variable number) + (letter designating loop iteration) + (mention number). For example, SKW097A1, is a 2022 variable from section K, variable number 097 in the first iteration of the loop, and the first mention. Other non-multiple mention variables within this type of loop are named with the letter designating the loop iteration. For example, SKW002A, is variable number 002 in the first iteration of the loop.

Null multiple mention variables and variables from null loops beyond the first mention or first loop are not included in the data. It is generally the case that one null multiple mention and one null loop was retained.

8A1b. Masked Variables

To protect the confidentiality of the information that respondents provide, a number of variables have been masked or are simply not included in the Early release public dataset. Some of these variables may be made available to analysts as restricted data in the future. See our Web site for details.

Names, addresses, days of birth, information on geographical relocation and similar variables are not included in publicly released files.

Geographical locations are recoded to a level no more detailed than U.S. Census Region and Division. Data on the highest educational degree earned have been further grouped together to increase cell sizes.

The names of variables that were masked for confidentiality end in the capital letter "M"; for example, variable SX026M (1ST ADDRESS STATE – MASKED).

8A1C. Other Specify Questions, Comments and Open Ends

"Other Specify" and "Open End", or questions that are answered with text (e.g., vocabulary words, industry and occupation) are not included in Early data releases. In many instances, these appear as blanks in the data but sometimes they are designated with "Data Not Available" text. Data from these types of questions should be available, where possible, in the Final data release.

8A2. Other Types of Documentation

In addition to this document and the codebook, three additional types of documentation are available.

8A2a. Overview of HRS Public Data Files for Cross-sectional and Longitudinal Analysis

This is a thorough document that provides a description of structure and content for all HRS public data files and a detailed explanation for handling the longitudinal nature of the survey. It is located here: http://hrsonline.isr.umich.edu/sitedocs/dmgt/OverviewofHRSPublicData.pdf

8A2b. Box and Arrow Questionnaire

The research community has referred to the type of documentation that describes the questions asked in the interview as a "questionnaire". Since the 2022 HRS data were collected using a Computer Assisted Interview (CAI) program, a traditional hard-copy questionnaire was not produced as part of the data collection phase. Therefore, in order to document question sequencing, we have provided a current-wave version of the traditional box and arrow questionnaire. The Box and Arrow Questionnaires are the "commented version" which include all changes made for the 2022 instrument. Changes can be found by searching for "#@" in the document.

8A2c. Cross-Wave Tracker File

The cross-wave tracker file contains basic demographic information, interview status, and if, when and how an interview was conducted during a specific data collection period. The cross-wave tracker file also contains weight variables. The tracker file contains one record for every person who was ever eligible to be interviewed in any wave. Please refer to the Cross-Wave Tracker data description, located at the top of our Data Descriptions and Release Notes page for a more detailed description.

9. Additional Notes

The following are miscellaneous additional notes regarding the 2022 HRS Core (Early, Version 3.0). If we become aware of additional issues, they will be posted on our Web site in the Data Alerts section.

9A. Households with No Family or Financial Respondents

As noted earlier in this document, the data collection design was to have asked most questions of all respondents and some questions of just a designated coverscreen, or family, or financial respondent on behalf of the household. However, occasionally that is not what happened. For some households we did not obtain an interview from a family or financial respondent. There were 380 households that had no family respondent; 189 households had no financial respondent. There are 4 missing coverscreen respondents in this wave. The household records for these households contain null values for the missing information. Households missing a family or financial respondent can be identified, respectively, by values of "Blank. No family/financial respondent" (in the household record) in the following variables:

        SPN_FAM – 2022 FAMILY RESP PERSON NUMBER
        SPN_FIN – 2022 FINANCIAL RESP PERSON NUMBER

9B. Unfolding Bracket Variables and Imputations

Typically, a series of unfolding bracket questions followed a lead-in question asking for an amount. If an actual amount was not given, a series of "unfolding" questions were asked. The manner in which the unfolding questions were programmed (Blaise) is different for the 2002 through 2010 data compared to the CAI (SurveyCraft) software used for 1993 through 2000. This change was transparent to the respondents, since exactly the same questions were asked with the new software as would have been asked with the old software; but it did have an implication for the data that were actually stored and also for the data that are released.

Instead of storing the response to each unfolding question, three summary variables were generated: the minimum and maximum values for the amount, given the answers to the unfolding questions, and if the last answer a respondent gave in an unfolding sequence was either "Don't Know" or "Refused," what that answer was. In 2002, if the Respondent said "more than" to the unfolding question with the highest value, then the maximum value was stored as ten times that value. However, in 2004 and 2010, if the Respondent said "more than" to the unfolding question with the highest value, then the maximum value was stored as 99999996.

For most analysts, those three variables (and in particular, the minimum and maximum of the possible range) will be sufficient for analyses. For any analyst who needs the more detailed information, it should be noted that the three variables, combined with the information about the unfolding questions provided in the box-and-arrow and codebook, are sufficient to allow the analyst to reconstruct the sequence of questions asked of any respondent, and the answers to each of those questions in many of the unfolding sequences.

For other sequences -- those in which respondents were randomly assigned to one of three "entry" points for the first unfolding question -- the analyst will also need to take into account a fourth variable (located in the preload sections) that specifies the entry point for each respondent. The following example shows the preload variable (PZ041) and the unfolding sequence that uses the random entry point from RZ041.

Example Random Entry Assignment Variable from Preload:
        Preload Variable from the data file H22pr_h:

```
.............................................................
SZ041                          PREASSIGNED UNFOLD RANDOM VALUE - SELF EMPLOYMENT
INCOME
        Section: PR    Level: Household     Type: Numeric    Width: 1
Decimals: 0
        Ref: HH.X041_UnfSEmpInc_V

        UNFOLD ASSIGN - SELF EMPLOYMENT INCOME



.............................................................
        3624            1.  RANDOM ASSIGNMENT 1
        3596            2.  RANDOM ASSIGNMENT 2
        3682            3.  RANDOM ASSIGNMENT 3
           4       Blank.  Data Missing
.............................................................
Example Unfolding Series from section Q that uses RX041 to assign respondents an
entry point:
.............................................................
SQ016                          R INCOME FROM SELF EMPLOYMENT - MIN
        Section: Q     Level: Household     Type: Numeric    Width: 6
Decimals: 0
        Ref: SecQ.RIncome.Q016_

        (Thinking about your self-employment income in  [Last Calendar Year]):

        Did it amount to less than $____ , more than $____ , or what?

        PROCEDURES: 3Up, 2Up1Down, 1Up2Down
        BREAKPOINTS:  $5,000, $10,000, $25,000, $100,000
        RANDOM ENTRY POINT ASSIGNMENT [1 ($5,000)] or [2 ($10,000)] or
        [{NOT 1 and NOT 2} ($25,000)] AT X041

        WEB-ADMINISTERED TEXT:
        Thinking about your self-employment income in  [Last Calendar Year]:

        Did it amount to less than $____ , more than $____ , or what?

        User Note: The procedures apply to both the interviewer-administered
        and web-administered text.


.............................................................
         115            0.  Value of Breakpoint
           4         5000.  Value of Breakpoint
          13         5001.  Value of Breakpoint
           2        10000.  Value of Breakpoint
          21        10001.  Value of Breakpoint
           1        25000.  Value of Breakpoint
          21        25001.  Value of Breakpoint
           1       100000.  Value of Breakpoint
           4       100001.  Value of Breakpoint
       10724       Blank.  INAP (Inapplicable); Partial Interview
.............................................................
.............................................................
SQ017                          R INCOME FROM SELF EMPLOYMENT - MAX
        Section: Q     Level: Household     Type: Numeric    Width: 8
Decimals: 0
```

```
        Ref: SecQ.RIncome.Q017_

        *


................................................................
        37        4999.  Value of Breakpoint
         4        5000.  Value of Breakpoint
        12        9999.  Value of Breakpoint
         2       10000.  Value of Breakpoint
        19       24999.  Value of Breakpoint
         1       25000.  Value of Breakpoint
        17       99999.  Value of Breakpoint
         1      100000.  Value of Breakpoint
        89    99999996.  Greater than Maximum Breakpoint
     10724        Blank.  INAP (Inapplicable); Partial Interview
................................................................
................................................................
 SQ018                        R INCOME FROM SELF EMPLOYMENT - RESULT
        Section: Q     Level: Household     Type: Numeric    Width: 2
Decimals: 0
        Ref: SecQ.RIncome.Q018_

        *


................................................................
        11           0.  No Breakpoint values given during interview
        26          98.  DK (Don't Know); NA (Not Ascertained)
        52          99.  RF (Refused)
     10817        Blank.  INAP (Inapplicable); Partial Interview
................................................................
```

9C. 2022 Unfoldings Issues

Due to a programming issue, some errors were introduced into unfoldings data obtained from interviewer-administered interviews in 2022. To correct problems with unfoldings data, HRS staff compared audit trail data, which presents a record of the entries made and actions taken by interviewers as they completed an interview, against the Blaise data. Where possible, the audit trail data was used to reconstruct the interview data however not all unfoldings problems could be resolved due to incomplete or missing audit data.

9D. Modules for the 2022 Data Collection

There are 6 modules for 2022 HRS. The module data can be found in the file H22V_R. Topical areas of the modules include:

MODULE 1: Boredom Proneness Scale
MODULE 2: Treatment Burden Questionnaire
MODULE 3: Scientific Knowledge and Beliefs
MODULE 4: American Community Study (ACS) Disability Questions
MODULE 5: Informal Care Expectations and Effects on Labor Supply
MODULE 6: Three Factor Moral Foundations Decision Making

9E. Explanation of the Difference between Tracker and Core Data Releases

There are some areas where the Tracker File and the core data are different. Below are some examples. The examples rely on data from the HRS 2008 Core.

LSUBHH - The tracker file assigns a '9' for all new spouses in 2008 for the previous wave's SUBHH number. The 2008 Final Release data, however, lists the SUBHH number of the household that the new spouse married into, since the new spouse will 'inherit' many of the relationships from that household.

LPN_SP - Even if a spouse did not give an interview in 2008, a spouse PN (LPN_SP) will exist in the core data. Additionally, for a non-original R's new spouse, we assign a spouse PN (LPN_SP) and track the spouse's influence on the household with that number, even though we will never interview that person. In contrast, the tracker file will not reference these spouses.

Family and Financial R Assignments - As we keep a record of a non-interviewed spouse in the core data, we also release their assigned role in the household (i.e. family or financial R) with a listing for LPN_FIN, and LPN_FAM in the household sections. The tracker file will simply list the assignments of the people interviewed. Therefore, for example, the 2008 Core Final data has a blank line in Section H for a household where '020' was the non-interviewed financial R. The tracker file would show the same household as not having a financial R.

Marital Status - It is important to note that marital status, as it was assigned in the 2008 data (LB063) may be different from the marital status variable (xMARST) in the Tracker file. Please refer to the Cross-Wave Tracker data description, located at the top of our Data Descriptions and Release Notes page for a more detailed description of how marital status was assigned and the criteria used to reclassify respondents. The marital status variable in the Tracker file was constructed by looking at several different sources of data, whereas the marital status variable in the 2008 Core Final data was not changed using outside sources, in order to preserve the flow through the instrument for respondents.

9F. Enhanced Face-to-Face Sample Design and Content
In 2006, HRS initiated what is referred to as an Enhanced Face-to-Face Interview. In addition to the core interview, the Enhanced Face-to-Face Interview includes a set of physical performance measures, collection of biomarkers, and a Leave-Behind Questionnaire on psychosocial topics. A random one-half of households were pre-selected for the enhanced face-to-face interview in 2006, with the other half of the sample selected for 2008, and the design is repeated in each subsequent wave. In coupled households, both members of the couple are selected. Selected respondents who completed a self (as opposed to proxy) interview, in-person (at least through Section I - the physical measures and biomarkers section), and who were non-institutionalized at the time of the interview were eligible for the physical measures and biomarkers components. This same group of respondents, plus those for whom an in-person proxy interview was completed, were also eligible for the Leave-Behind Questionnaire.

Psychosocial Leave-Behind Questionnaire (Section LB_R)
In 2004, HRS added a new feature for data collection in the form of self-administered questionnaires that were left with respondents upon the completion of an in-person Core Interview, referred to as the Leave-Behind Questionnaire. The purpose of the Leave-Behind Questionnaire is to collect additional information from respondents without adding to the interview length. In 2018, as in previous data collections since 2006, the Leave-Behind Questionnaire was incorporated into the Enhanced Face-to-Face Interview. The Leave-Behind Questionnaire administered in 2010 is called the Participant Lifestyle Questionnaire, and it includes questions on participation in general activities,

relationships with others, and views on their life in general as well as specific aspects of their life.

Physical Performance Measures and Biomarkers (Section I_R)
- Blood pressure
- Hearing test
- Breathing test (peak flow)
- Grip strength
- Balance tests (semi-tandem, side-by-side, and with [30/60] second full-tandem)
- Timed walk (8 ft., eligible if 65 or older)
- Height
- Weight (eligible if weight is under 300 pounds)
- Waist circumference
- Saliva (for which DNA was extracted and stored – eligible if saliva invalid previous wave or no saliva collection previous wave)
- Dry blood spots (analyzed for Hemoglobin A1c, total cholesterol and HDL cholesterol)

With the exception of the timed walk, which was administered only to respondents 65 years of age or older, the physical measures and biomarkers were conducted on the full enhanced face-to-face sample.

Three separate consents were obtained to cover: 1) all of the physical measures, plus blood pressure; 2) saliva sample; and 3) dry blood spots. The physical measures booklet, which the interviewers used to administer the physical measures and biomarkers, is available on the HRS website Physical Measures 2018. The booklet contains the consent forms, as well as instructions and protocols for all of the measurements.

9G. Web
In 2022, HRS administered its third wave of Web as an alternate mode for data collection for the core biennial interview. Web was offered as an alternative for telephone and regular face-to-face respondents only; respondents in the half-sample scheduled for the enhanced face-to-face interview were not eligible for Web this wave. Households previously selected as Web eligible 2018 remain Web eligible as long as they continue to meet eligibility criteria based on a prior report of internet access along with other selection criteria (e.g., English speaking, self-respondent, non nursing-home resident in prior wave). In addition, the 2016 LBB new cohort households are also eligible for Web based on the same eligibility criteria.

In total, 3,317 eligible households were identified. By design, 60% of eligible households were to be assigned to receive a web invitation, with the remainder receiving their usual mode of either telephone or face-to-face. This resulted in 1,989 eligible households receiving the Web invitation and 1,328 eligible households not receiving the Web invitation. The intention was for this assignment to be random across cohorts and households. However, due to a programming error the designation was not random and should not be used to study mode effect in the 2022 wave.

Mode Variables
Within each section data file, mode variables are provided to aid in identifying which mode a respondent was in when they completed a given section: phone, face-to-face and Web. For Web we make a further distinction of "Web" and "Web-small"

to differentiate between respondents who used a PC versus those who used smartphones or tablets. Respondents could switch back and forth between PC and smartphone or tablet throughout the interview.

Non-Response
In the web version of the questionnaire, respondents are allowed to leave any given question that was presented on the screen unanswered to comply with the voluntary nature of the survey. This was distinctly different from the interviewer-administered version of the questionnaire which did not allow questions to be "empty." If the respondent could not or refused to answer, the interviewer could select "Don't Know" or "Refused" as appropriate.
Web non-response cases were reviewed by HRS staff. We have incorporated "web non-response" indicators in the data to signal where a question was presented to the respondent but they did not answer. The web non-response flags are based on the final path taken by the respondent through the interview. If the respondent backed up to change an answer and went down a different path, the data for the first path was not retained.

Metadata
The Web survey was programmed to be as close as possible to the other modes. There are instances where the question text for Web differs from the telephone/in-person interview question text. The question text is documented in the codebook as "WEB-ADMINISTERED TEXT" as shown below. The questionnaire contains a complete description of the interview content by section including question wording, order and flow.

- -
QB000   LIFE SATISFACTION
Section: B   Level: Respondent   Type: Numeric   Width: 2   Decimals: 0
        Ref: SecB.B000_

        Now, please think about your life-as-a-whole. How satisfied are you
        with it? Are you completely satisfied, very satisfied, somewhat
        satisfied, not very satisfied, or not at all satisfied?

        WEB-ADMINISTERED TEXT:
        Now, please think about your life-as-a-whole. How satisfied are you
        with it?
....
            1   -8. Web non-response
         3137   1. COMPLETELY SATISFIED
         6197   2. VERY SATISFIED
         3892   3. SOMEWHAT SATISFIED
          494   4. NOT VERY SATISFIED
          166   5. NOT AT ALL SATISFIED
          143   8. DK (Don't Know); NA (Not Ascertained)
           11   9. RF (Refused)
          585   Blank. INAP (Inapplicable); Partial Interview

Section D Cognition
The variables that comprise the Section D Web Immediate and Delayed Word Recall as described in the tables below are under review and will be made available in a subsequent data release.

Immediate Recall			**Delayed Recall**	

Variable Name	Description	Variable Name	Description
SD182WM#	WEB WORD RECALL IMMED. (where # denotes the multiple mention indicator 1, 2, 3, etc.)	SD183WM#	WEB WORD RECALL DELAYED (where # denotes the multiple mention indicator 1, 2, 3, etc.)
SD174W	WEB NUMBER GOOD - IMMEDIATE	SD184W	WEB NUMBER GOOD - DELAYED
SD175W	WEB NUMBER WRONG - IMMEDIATE	SD185W	WEB NUMBER WRONG - DELAYED
SD176W	WEB NUMBER FORGOTTEN - IMMEDIATE	SD186W	WEB NUMBER FORGOTTEN - DELAYED
SD177W	WEB NONE REMEMBERED - IMMEDIATE - FLAG	SD187W	WEB NONE REMEMBERED - DELAYED
		SD191W	WEB WORDLIST CHECK DID R USE AID

The CALCULATED NUMBER SERIES SCORE (RNSSCORE) and STANDARD ERROR OF NUMBER SERIES SCORE (RNSSCORESE) variables in Section D require additional review by HRS Staff. These variables are designated as under review in the codebook and will be made available in a subsequent data release.

9H. Questionnaire Changes

The release package of files that is available to download with this data product contains the "commented version" of the questionnaires that describe in detail all changes made for the 2022 instrument. Data users can identify question text and other changes by searching for "#@" document. The commented box and arrow questionnaires are available in the download set (h20qn.zip). Data Model changes are described in Appendix D (link).

9I. Whole Blood Draws

Beginning in 2016, The Health and Retirement Study started collecting whole blood samples from respondents.   Individuals are asked to consent to the whole blood draw at the end of the core interview and are mailed a $50 token of appreciation subsequent to the consent and before the whole blood draw appointment. An "acknowledgement of consent" is signed at the time of collection. In 2018, the entire LBB (Late Baby Boomer) cohort, anyone eligible for the whole blood draw in 2016 who did not consent to or complete a WBD request at that time, and any new respondents were eligible to participate. This request was made to all eligible self-interview respondents (regardless of mode of interview or preferred language), provided they were not in a nursing home.

9J. Errata

Interviewer Observations
The Interviewer Observations respondent level data (IO_R) included in this data release should be considered preliminary. Given the nature of how this data is acquired and processed, and particular challenges unique to this wave, the data are still undergoing cleaning. Any needed changes will be reflected in the Final data release.

2022 Self-Administered Questionnaire (SAQ)
Variable LB019 of the SAQ for waves 2006-2012 and 2018-2022 included 15 items. The same question was named LB018 in waves 2014 and 2016 and it consisted of 10 items that were presented in a slightly different order than in the other waves.

Beginning with 2020, the LB019 data and codebook will align with how the variables appear in the questionnaire.

The following table lists the question and variable names from 2006-2022.

Question Text	Variable Name by Wave								
	2006	2008	2010	2012	2014	2016	2018	2020	2022
If something can go wrong for me, it will.	KLB019F	LLB019F	MLB019F	NLB019F	OLB018A	PLB018A	QLB018A	RLB018F	SLB018F
I'm always optimistic about my future.	KLB019G	LLB019G	MLB019G	NLB019G	OLB018B	PLB018B	QLB018B	RLB018G	SLB018G
In uncertain times, I usually expect the best.	KLB019H	LLB019H	MLB019H	NLB019H	OLB018C	PLB018C	QLB018C	RLB018H	SLB018H
Overall, I expect more good things to happen to me than bad.	KLB019I	LLB019I	MLB019I	NLB019I	OLB018D	PLB018D	QLB018D	RLB018I	SLB018I
I hardly ever expect things to go my way.	KLB019J	LLB019J	MLB019J	NLB019J	OLB018E	PLB018E	QLB018E	RLB018J	SL018J
I rarely count on good things happening to me.	KLB019K	LLB019K	MLB019K	NLB019K	OLB018F	PLB018F	QLB018F	RLB018K	SL018K
I feel it is impossible for me to reach the goals that I would like to strive for.	KLB019L	LLB019L	MLB019L	NLB019L	OLB018G	PLB018G	QLB018G	RLB018L	SL018L
The future seems hopeless to me and I can't believe that things are changing	KLB019M	LLB019M	MLB019M	NLB019M	OLB018H	PLB018H	QLB018H	RLB018M	SL018M

for the better.									
I don't expect to get what I really want.	KLB019N	LLB019N	MLB019N	NLB019N	OLB018I	PLB018I	QLB018I	RLB018N	SL018N
There's no use in really trying to get something I want because I probably won't get it.	KLB019O	LLB019O	MLB019O	NLB019O	OLB018J	PLB018J	QLB018J	RLB018O	SL018O
Most people dislike putting themselves out to help other people.	KLB019A	LLB019A	MLB019A	NLB019A	N/A	N/A	QLB018K	RLB018A	SLB018A
Most people will use somewhat unfair means to gain profit or an advantage rather than lose it.	KLB019B	LLB019B	MLB019B	NLB019B	N/A	N/A	QLB018L	RLB018B	SLB018B
No one cares much what happens to you.	KLB019C	LLB019C	MLB019C	NLB019C	N/A	N/A	QLB018M	RLB018C	SLB018C
I think most people would lie in order to get ahead.	KLB019D	LLB019D	MLB019D	NLB019D	N/A	N/A	QLB018N	RLB018D	SLB018D
I commonly wonder what hidden reasons another person may have for doing something nice for me.	KLB019E	LLB019E	MLB019E	NLB019E	N/A	N/A	QLB018O	RLB018E	SLB018E

9K. Summary of Data Model (DM) Changes during 2022 Production
During the field period, changes to the instrument were made in order to correct errors in programming, improve the quality of the data, modify the question wording/content or to add new questions. A complete listing of Data Model changes (that impact Core data) is provided in Appendix D ([link](#)). The variable SVDATE (which corresponds to the field DM Version in the table provided in the Appendix) exists in all of the data files and it tells what version of the data model was used to collect a given interview.

9L. New/Modified Questions in HRS 2022
Note: "codeframe" is the possible value(s) for each variable and a brief explanation of what the codes represent.

Section A:
- A256 R HAD COVID WHEN DIED
- A023 PREVIOUS WAVE SP/P ALIVE – asked before A166_020
- A024 MO COUPLE STOP LIVING TOGETHER/DIE (changed codeframe)

Section B
- B138 LANGUAGE SPOKEN
- B139 WHICH LANGUAGE
- B140 WHICH LANGUAGE – SPECIFY
- B041M (changed codeframe)

Section C
- C033 LUNG OXYGEN (changed codeframe)
- C327 COVID VACCINE
- C328 COVID VACCINE MONTH
- C330 COVID VACCINE YEAR
- C331 COVID STATEMENTS
- C332 COVID SYMPTOMS
- C333 HEALTH ISSUES FROM COVID
- C319 FIT OR COLOGUARD TEST
- C320 FIT OR COLOGUARD TEST YR
- C334 PAST SEVEN DAYS - TIRED
- C335 PAST SEVEN DAYS - EXHAUSTION
- C336 PAST SEVEN DAYS - LOW ENERGY
- C337 PAST SEVEN DAYS - FATIGUE LIMITED WORK
- C338 PAST SEVEN DAYS - FATIGUE AND THINKING
- C339 PAST SEVEN DAYS - FATIGUE AND BATHING

Section D
- D108 NO DESCRIPTION (changed codeframe)
- D189 D189 CHECKPOINT R USED AID-SUBTRACTION (changed codeframe)
- D191 WORDLIST CHECK DID R USE AID (changed codeframe)
- D354 DID R USE AID - MEMORY
- D355 DID R USE AID - VOCABULARY
- D356 DID R USE AID - NUMBER USE
- D245 ANIMAL NAME PROBLEMS (changed codeframe)
- D357 R USED AID-NUMBER SERIES
- D358 IW MODE-D (changed codeframe)
- D339 – D353 Trail Making Test

Section E
- E171/E170 Which children (or children-in-law) (changed codeframe)

Section F
- F247 DIFFICULTY PAY MO BILLS - PARENTS
- F248 DIFFICULTY PAY MO BILLS – MOTHER
- F249 DIFFICULTY PAY MO BILLS – FATHER
- F250 DIFFICULTY PAY MO BILLS – SIBLING

Section J
- J073 WHY LEFT EMPLOYER (changed codeframe)
- J076 HOW EMPLOYMENT SITUATION CHANGED (changed codeframe)
- J986 COVID CONCERNS
- J987 COVID CONCERNS SPECIFY
- J967 - J985 EMP CURRENTLY DO ANYTHING
- J607 WHY STOPPED WORKING (changed codeframe)
- K029 WHY LEFT EMPLOYER (changed codeframe)
- L025 WHY LEFT EMPLOYER (changed codeframe)

Section J2
- J812 PCT INVESTED- IN STOCKS
- J988 TARGET DATE LIFE CYCLE FUND

Section N
- N415 Why change Part D (changed codeframe)
- N253_N049 EMPYR BASED INS-WHO COVERED (changed codeframe)
- N431 prescription drug coverage (changed codeframe)
- N069 DENTAL COV - WHICH PREV MENTION PLAN (changed codeframe)
- N073 LTC COV- WHICH PREV MENTION PLAN (changed codeframe)
- N474, N475 Oxygen or Ventilator
- N477, N478, N479, N486, N487 Covid
- N476 Telehealth
- N489, N490, N491 Needed care didn't get it
- N492. N493, N494 Didn't get medical care
- N495, N496, N497, N498, N499 End of life care

Section P - eliminated several variables:
- P166 CHANCE HOME WORTH MORE
- P168 CHANCE HOME GAIN/LOSE X PERCENT NEXT YR
- P015 LIKELIHOOD R WILL FIND ANOTHER JOB

- P123 WORK FT AFTER 62 EQUALLY LIKELY
- P102 EPISTEMIC UNCERTAINTY LIVE TO 75
- P157 LIVE TO 80/85/90/95/100 EQUALLY LIKELY
- P175 PERCENT CHANCE R WILL PAY OUT-OF-POCKET
- P176 PERCENT CHANCE R WILL PAY OUT-OF-POCKET
- P177 PERCENT CHANCE R WILL PAY OUT-OF-POCKET
- P178 PERCENT CHANCE R WILL PAY OUT-OF-POCKET
- P183 CHANCE YOUR FUTURE SOCSEC BENEFITS LESS
- P047 CHANCE MUTUAL FUNDS WORTH MORE NXT YR
- P113 EPISTEMIC UNCERTAINTY STOCKS UP OR DOWN
- P150 MARKET UP/DOWN BY X% NEXT YEAR
- P180 CHANCE MUTUAL FUNDS WORTH BULE-CHIP STOC
- P097 HOW CLOSELY FOLLOW STOCK MARKET
- P185 TEN YEARS FROM NOW STANDARD LIVING RATING

Section Q
- Q518 PAID OFF CRED CARD LAST MO (changed codeframe)
- DEBTS: Q539, Q540, Q541, Q542, Q543, Q544, Q545, Q546, Q547, Q548, Q549, Q550, Q551, Q552, Q553

Section T
- T247 WHO HAS DURABLE POWER OF ATTORNEY

Section W
- W822 SSA Mail Eligible (changed codeframe)
- W307 W Assist (changed codeframe)

Section TN
- TN01 Mode Change (changed codeframe)

Section EOI
- W805, W810-W817
- W821 AGREE VBS

9M. Data Changes in this data release
Below we summarize the changes made in this release:
- Added new data in Section D.
- Corrected a PN in HHID 555134.
- Updated the Person Number (PN) from 020 to 010 for five households (551155, 551241, 551791, 556507, 559905).
- Updated the codeframes for SLBELIG, SLBCOMP and SLBTYPE.
- Made corrections to asset data for a few respondents in Sections Q and H.

9N. Major Changes to the Instrument
Section M
Sections M1 and M2 and were re-written and combined into a single section, M.

Treatment of Financial Respondents when Financial Respondent in a couple did not complete a Financial Interview in the Previous Wave

In 2022, to ensure we collect a financial interview for a household when the financial respondent in a couple did not respond to the survey in the previous wave (2020), we added the following conditions to the fin/fam assignment.
- If the financial respondent completed an interview through section Q in the previous wave, we followed the same procedure as previous waves.
- If the financial respondent did not complete an interview through Section Q in the previous wave then:
    o If the coverscreen respondent (CSR) is the preloaded financial respondent, then the CSR will remain as the financial respondent.
        ▪ During the second respondent's interview, if the CSR completed an interview through the end of section Q then the second respondent fin/fam assignment is not changed.
        ▪ Otherwise, the second respondent will be assigned as the financial Respondent.
    o If CSR is not the preloaded financial Respondent, the CSR will be assigned as the financial Respondent.
        ▪ During the second respondent's interview, the second respondent will remain as the financial Respondent.
Note: This new treatment may lead to two financial interviews for one household. If two financial interviews are collected, we retain the financial data of only the original financial respondent.

Asset Reconciliation
By design, HRS respondents are asked to resolve discrepancies in the monetary values of assets that they tell us about. In 2022, we eliminated the Asset Reconciliation Section (Section U) that came at the end of the interview, and started asking reconciliation questions after the appropriate question in Sections H and Q. Reconciliation questions about primary residence, first mortgage on main home and second residence now appear in Section H. Reconciliation questions about businesses or farms, IRAs, stocks, checking/savings, and other personal items of value now appear in Section Q. We no longer ask reconciliation questions about general debts, net trusts, vehicles, CD's, bonds, real estate properties, second mortgages, equity loans, mobile homes, or mortgages on second homes. We summarize below the differences between Asset Reconciliations and Asset Reconciliation Eligibility in 2022 and prior waves.

2020 and Prior
- Respondents could be asked about discrepancies for up to eighteen assets if certain criteria were met
- A global eligibility requirement was used (the difference in Net Worth of household assets must differ by at least $150,000 between waves.)
- Questions were asked at the end of the interview, not in context
- Eligibility was based on a flat dollar amount difference (if difference between waves was > $50,000) and this condition being met

  <u>Condition 1</u>
  - Living respondent
  - Previous wave financial interview took place in the prior wave
  - Re-interview household
  - Same financial reporter as last wave

2022
- Respondents are eligible to be asked about eight types of assets if certain criteria are met
- HRS determined which assets to ask about by cross tabulating assets asked about most often with assets that were frequently reported as incorrect
- Questions are asked in context, immediately following the respondent's report of current wave asset value
- Eligibility criteria include Condition 1 and a new criteria:

  <u>Condition 2</u>
  - Difference between waves for each asset is greater than or equal to $50,000
  - Difference between waves is greater than the minimum of *either* the previous wave or the current wave. For example, if in the previous wave the asset was $100k, and current wave it is $200k – The difference is greater than $50k, but not greater than the minimum of either wave (100k and 200k).

Beginning in 2022, there are new asset specific requirements
- **Primary Residence:** the respondent cannot have moved homes since prior wave (we want to make sure we are asking them about the same home)
  - We will still ask if they did not have this asset previously and now do
  - We still ask if they had this asset previously and now do not
    - Example: Rented same residence before and now own it
- **Mortgage on Primary Residence:** the respondent cannot have moved homes since prior wave
- **Second Residence:** the respondent cannot have moved second residence since prior wave (we want to make sure we are asking them about the same home)

Section Q
We re-wrote the debt sequence in Section Q. In 2020 and prior waves we had a single question that asked about credit cards, medical debit, loans, etc. Beginning in 2022, we broke these into individual questions and added a new question to ask about student loan debt.

10. OBTAINING THE DATA

10A. Registration and Downloading the Data

HRS data are available for free to researchers and analysts at the HRS Web site. In order to obtain public release data, you must first register at our Web site. Once you have completed the registration process, your username and password will be sent to you via e-mail. Your username and password are required to download any data files.

By registering all users, we are able to document for our sponsors the size and diversity of our user community allowing us to continue to collect these important data. Registered users receive user support, information related to errors in the data, future releases, workshops, and publication lists. The information you provide will not be used for any commercial use, and will not be redistributed to third parties.

10B. Conditions of Use

By registering, you agree to the Conditions of Use governing access to Health and Retirement public release data.

10C. Publications Based on Data

As part of the data registration process, you agree to include specified citations and to inform HRS of any papers, publications, or presentations based on HRS data. Please send a copy of any publications you produce based on HRS data, with a bibliographical reference, if appropriate, to the address below.

> Health and Retirement Study
> Attn: Papers and Publications
> The Institute for Social Research
> P.O. Box 1248
> Ann Arbor, MI(USA) 48106-1248

Alternately, you may contact us by e-mail at hrsquestions@umich.edu with: "Attn: Papers and Publications" in the subject line.

11. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines to using the 2022 HRS Core (Early, Version 3.0) data. If you have questions or concerns that are not adequately covered here or on our Web site, or if you have any comments, please contact us. We will do our best to provide answers.

11A. HRS Internet Site

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access the data and other relevant information, point your Web browser to the HRS Web site.

11B. Contact Information:

Internet: Help Desk at our Web site (https://hrs.isr.umich.edu/help)
E-mail: hrsquestions@umich.edu
Postal Service:
> Health and Retirement Study
> P.O. Box 1248
> Ann Arbor, MI 48106-1248

FAX: (734)647-1186

Appendix

A. Examples of Sub-Household and Respondent Person Number and Other Person Number Assignments

In the first year of data collection, all households, consisting of either a single respondent or of two married or partnered respondents, were assigned a SUBHH of 0.

In subsequent waves, a SUBHH of 0 indicates that the original household has not split due to divorce or separation of spouses or partners, although one member of a couple may have died or a single respondent may have become married or partnered.

A value of 1 or 2 indicates a household in which the original couple split, divorced or separated. One of the original couple is assigned a SUBHH of 1; the other is assigned a SUBHH of 2.

A value of 5 or 6 indicates a previously split household split a second time. One of the couple from a SUBHH 1 or 2 retains a SUBHH of 1 or 2; the other is assigned a SUBHH 5 or 6.

A value of 7 indicates respondents from split household reunited[1].
It is important to understand these assignments when you merge records from different waves of the study.

A1. Married Couple Stays Married

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 012345 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

At the time of the second cross-section the two respondents are still married, and each retains their HHID of 012345 and their SUBHH of 0 and his and her PN of 010 and 020, respectively.

Time 1
```
Household records
     HHID=012345 ASUBHH=0
Respondent records
     HHID=012345 PN=010 ASUBHH=0
     HHID=012345 PN=020 ASUBHH=0
```
Time 2
```
Household records
     HHID=012345 CSUBHH=0
Respondent records
     HHID=012345 PN=010 CSUBHH=0
     HHID=012345 PN=020 CSUBHH=0
```

---

[1]In addition, a SUBHH of 3 or 4 indicates the "household" of a deceased respondent who is considered to be in a household of his or her own. These values do not occur in these files because all records in these files are from living respondents.

A2. Couple Divorces
Two respondents in a sample household are married at the time of the first
cross-section. Each respondent is assigned a HHID of 023456 and a SUBHH of 0.
One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. Both
respondents retain the HHID of 023456, but one is assigned a SUBHH of 1 and the
other is assigned a SUBHH of 2. Each original respondent retains his and her PN
of 010 and 020, respectively.

Time 1
Household records
    HHID=023456 ASUBHH=0
Respondent records
    HHID=023456 PN=010 ASUBHH=0
    HHID=023456 PN=020 ASUBHH=0
Time 2
Household records
    HHID=023456 CSUBHH=1
    HHID=023456 CSUBHH=2
Respondent records
    HHID=023456 PN=010 CSUBHH=1
    HHID=023456 PN=020 CSUBHH=2

A3. One or Both Respondents Die
Two respondents in a sample household are married at the time of the first
cross-section. Each respondent is assigned a HHID of 034567 and a SUBHH of 0.
One respondent has a PN of 010, the other a PN of 020.

One respondent dies before the next wave. At the next wave, both respondents
retain their HHID of 034567. The living respondent retains her SUBHH of 0; the
deceased respondent is assigned a SUBHH of 3. (If both respondents die, one
would be assigned a SUBHH of 3 and the other would be assigned a SUBHH of 4.)
Each original respondent retains his and her PN of 010 and 020, respectively.

Time 1
Household records
    HHID=034567 ASUBHH=0
Respondent records
    HHID=034567 PN=010 ASUBHH=0
    HHID=034567 PN=020 ASUBHH=0
Time 2
Household records
    HHID=034567 CSUBHH=0
HHID=034567 CSUBHH=3 (in exit interview)
Respondent records
HHID=034567 PN=010 CSUBHH=3 (in exit interview)
    HHID=034567 PN=020 CSUBHH=0

A4. Single Respondent Marries
A respondent who has never been married is in the first cross-section. The
respondent is assigned a HHID of 045678 and a SUBHH of 0 and a PN of 010.

At the time of the second cross-section, the respondent has married. Both the
respondent and her new spouse are assigned a HHID of 045678 and a SUBHH of 0
because the household was not divided. The original respondent retains her PN of
010. Her new spouse is assigned PN of 011.

Time 1
```
Household records
     HHID=045678 ASUBHH=0
Respondent records
     HHID=045678 PN=010 ASUBHH=0
```

Time 2
```
Household records
     HHID=045678 CSUBHH=0
Respondent records
     HHID=045678 PN=010 CSUBHH=0
     HHID=045678 PN=011 CSUBHH=0
```

A5. Couple Divorces, One Respondent Remarries and Divorces
Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 056789 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced and he has remarried. Both original respondents retain the HHID of 056789, but she is assigned a SUBHH of 1 and he is assigned a SUBHH of 2. His new spouse is also assigned the HHID of 056789 and the SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively. His new spouse is assigned PN of 011.

By the time of the third cross-section, that new couple has gotten divorced. All respondents retain the HHID of 056789. The original sample member ex-wife has the SUBHH of 1. The original sample member ex-husband has a SUBHH of 2, and the non-original sample member, his second ex-wife, is assigned the SUBHH of 5. Each original respondent retains his and her PN of 010 and 020, respectively. His second ex-wife retains her PN of 011.

Time 1
```
Household records
     HHID=056789 ASUBHH=0
Respondent records
     HHID=056789 PN=010 ASUBHH=0
     HHID=056789 PN=020 ASUBHH=0
```

Time 2
```
Household records
     HHID=056789 CSUBHH=1
     HHID=056789 CSUBHH=2
Respondent records
     HHID=056789 PN=010 CSUBHH=2
     HHID=056789 PN=011 CSUBHH=2
     HHID=056789 PN=020 CSUBHH=1
```

Time 3
```
Household records
     HHID=056789 FSUBHH=1
     HHID=056789 FSUBHH=2
     HHID=056789 FSUBHH=5
Respondent records
     HHID=056789 PN=010 FSUBHH=2
     HHID=056789 PN=011 FSUBHH=5
```

```
     HHID=056789 PN=020 FSUBHH=1
```

A6. Couple Divorces and Marries Again
Two respondents in a sample household are married at the time of the first
cross-section. Each respondent is assigned a HHID of 067890 and a SUBHH of 0.
One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. Both
respondents retain the HHID of 067890, but one is assigned a SUBHH of 1 and the
other is assigned a SUBHH of 2. Each original respondent retains his and her PN
of 010 and 020, respectively.

By the time of the third cross-section, the respondents have remarried each
other. Both are assigned the HHID of 067890 and the SUBHH of 7. Each original
respondent retains his and her PN of 010 and 020, respectively.

Time 1
```
Household records
     HHID=067890 ASUBHH=0
Respondent records
     HHID=067890 PN=010 ASUBHH=0
     HHID=067890 PN=020 ASUBHH=0
```

Time 2
```
Household records
     HHID=067890 CSUBHH=1
     HHID=067890 CSUBHH=2
Respondent records
     HHID=067890 PN=010 CSUBHH=1
     HHID=067890 PN=020 CSUBHH=2
```

Time 3
```
Household records
     HHID=067890 FSUBHH=7
Respondent records
     HHID=067890 PN=010 FSUBHH=7
     HHID=067890 PN=020 FSUBHH=7
```

A7. Married Couple with Children and Siblings
At the time of the first cross-section, sample household with a HHID of 078901
contains two respondents assigned PNs of 010 and 020, respectively. Associated
with the household are three children with OPNs of 101, 102, and 103, and two
siblings with OPNs of 051 and 052. All seven persons will keep those same PNs
and OPNs across time. A friend who lives with the respondents is assigned an OPN
of 080. The friend will keep her OPN of 080 across time only if she is a
household member at each wave.

Time 1
```
Household records
     HHID=078901 ASUBHH=0
Respondent records
     HHID=078901 PN=010 ASUBHH=0
     HHID=078901 PN=020 ASUBHH=0

Household member/child records
     HHID=078901 ASUBHH=0 OPN=101 (child)
     HHID=078901 ASUBHH=0 OPN=102 (child)
```

```
     HHID=078901 ASUBHH=0 OPN=103 (child)
     HHID=078901 ASUBHH=0 OPN=051 (sibling)
     HHID=078901 ASUBHH=0 OPN=052 (sibling)
     HHID=078901 ASUBHH=0 OPN=080 (friend)
```

A8. Couple with Children and Siblings Divorces
At the time of the first cross-section, sample household with a HHID of 089012
contains two respondents assigned PNs of 010 and 020, respectively. Associated
with the household are two children with OPNs of 101, and 102, and three
siblings, her two brothers with OPNs of 051 and 052 and his sister with an OPN
of 061. A friend who lives with the respondents is assigned an OPN of 080.

By the time of the second cross-section, the couple has divorced. Both
respondents retain the HHID of 089012, but he is assigned a SUBHH of 2 and she
is assigned a SUBHH of 1. Each original respondent retains his and her PN of 010
and 020, respectively.

The two children appear both in their father's SUBHH 2 and also in their
mother's SUBHH 1 with their respective OPNs, 101, and 102. The three siblings
appear in the SUBHH of their respective siblings and maintain their respective
OPNs. The ex-wife's brothers appear as part of her SUBHH 1 with their OPNs of
051 and 052, respectively. The ex-husband's sister appears as part of his SUBHH
2 with her OPN of 061. The friend has moved out and does not appear in either
household.

Time 1
Household records
```
     HHID=089012 ASUBHH=0
```
Respondent records
```
     HHID=089012 PN=010 ASUBHH=0
     HHID=089012 PN=020 ASUBHH=0
```
Household member/child records
```
     HHID=089012 ASUBHH=0 OPN=101 (child)
     HHID=089012 ASUBHH=0 OPN=102 (child)
HHID=089012 ASUBHH=0 OPN=051 (her brother)
HHID=089012 ASUBHH=0 OPN=052 (her brother)
HHID=089012 ASUBHH=0 OPN=061 (his sister)
     HHID=089012 ASUBHH=0 OPN=080 (friend)
```

Time 2
Household records
```
     HHID=089012 CSUBHH=1
     HHID=089012 CSUBHH=2
```
Respondent records
```
     HHID=089012 PN=010 CSUBHH=2
     HHID=089012 PN=020 CSUBHH=1
```
Household member/child records
```
     HHID=089012 CSUBHH=1 OPN=101 (child)
     HHID=089012 CSUBHH=1 OPN=102 (child)
HHID=089012 CSUBHH=1 OPN=051 (her brother)
HHID=089012 CSUBHH=1 OPN=052 (her brother)
     HHID=089012 CSUBHH=2 OPN=101 (child)
     HHID=089012 CSUBHH=2 OPN=102 (child)
HHID=089012 CSUBHH=2 OPN=061 (his sister)
```

A9. Couple Divorces, One Respondent Remarries, Both Split-off Households Have New Members

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 090123 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. She has moved in with her mother. He has married a woman with two children. At the second cross-section, both original respondents retain the HHID of 090123, but he is assigned a SUBHH of 1 and she is assigned a SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively. His new spouse and new stepchildren are assigned the HHID of 090123 and the SUBHH of 1. His new spouse is assigned a PN of 011. His new stepchildren are assigned OPNs of 151 and 152. Her mother is assigned the HHID of 090123 and the SUBHH of 2 and an OPN of 151.

Time 1
```
Household records
     HHID=090123 ASUBHH=0
Respondent records
     HHID=090123 PN=010 ASUBHH=0
     HHID=090123 PN=020 ASUBHH=0
```

Time 2
```
Household records
     HHID=090123 CSUBHH=1
     HHID=090123 CSUBHH=2
Respondent records
     HHID=090123 PN=010 CSUBHH=1
     HHID=090123 PN=011 CSUBHH=1 (new wife)
     HHID=090123 PN=020 CSUBHH=2
Household member/child records
HHID=090123 CSUBHH=1 OPN=151 (his stepchild)
HHID=090123 CSUBHH=1 OPN=152 (his stepchild)
     HHID=090123 CSUBHH=2 OPN=151 (her mom)
```

B. 2022 Production Data Model (DM) Changes (as of 1/31/2024)

DM Version	Section	Field Name	Summary
7	All	B036	Problem: At all fields where there is a year field, the upper bound is currently 2023, which will likely be an issue when NC cases for 2022 continue into 2024 for all "year" fields. Fix: All year fields changed to allow 2024
7	C	C270	Problem: There were some flow issues in CAWI caused by a fix to the heart condition sequence in Data Model 6. Fix: Fixed these flow issues
7	M	M103	Problem: M103 codes 5 and 6 are skipping to M106 Branchpoint, but they should skip to M105. Fix: Revised skips
7	M	M118	Problem: We assigned too many people to M118=5. We need to modify the assignment criteria to include that they must currently have a work limiting disability in addition to currently working. Fix: Added work limiting disability condition to assignment.
7	N	N351	Problem: N351 was incorrectly asked when Medicaid or Medicare was not an HMO or Managed Care Plan. Fix: Now asked only of HMO or Managed Care Plans
7	T	T047, T250	Problem: Questions about parents DPOA for healthcare were incorrectly based on response to T250. Fix: Changed the logic to allow these to appear regardless of T250 response.
6	A	A124	Problem: Exit was missing the nursing home QxQ. Fix: Added missing QxQ to Exit.
6	C	C024, C040, C226, C260, C263, C266	Problem: When a respondent left the field empty in Web, they were not skipping to the correct place. Fix: Updated the logic for these fields so empties follow the same flow as a refusal.
6	C	C324	Problem: When a respondent left the field empty in Web or DK/RF in CAPI, they were not skipping to the correct place. Fix: Updated the logic so empties, DKs and RFs flow correctly.
6	EOI	W802_VBS _MakeAppt	Problem: The time displayed was off by an hour. Fix: This was due to daylight savings time. Appears to be working correctly now.
6	EOI	W807	Problem: Need to change the text of the instruction and code 5. Fix: Revised instruction and code 5 text: Instruction was: [INSTR: If you were unable to make an appointment, select '5' and explain that ExamOne will contact the Respondent within approximately 3 weeks to set up the appointment.]

			Now: [INSTR: If you were unable to reach an ExamOne scheduler, select '5' and explain that ExamOne will contact the Respondent within approximately 3 weeks to set up the appointment.] Code 5 was: 5. UNABLE TO MAKE APPOINTMENT Now: 5. UNABLE TO REACH AN EXAMONE SCHEDULER
6	J	J982	Problem: This question was not multiple mention, but should be. Fix: Made J982 a multiple mention codeframe, but had to change it to new variable J990 to avoid harmful changes.
6	M	M219	Problem: This question was not multiple mention, but should be. Fix: Made J219 a multiple mention codeframe, but had to change it to new variable M219_DM6 to avoid harmful changes.
6	N	N350	Problem: Respondents not covered by Medicare but receiving Medicaid through an HMO were incorrectly skipping to N023 after N350 when they should have gone to N014. Fix: Corrected flow for this situation.
6	N	N443_N180	Problem: "per month" was erroneously dropped from the question text for Data Models prior to Data Model 6. Fix: Adding back "per month"
6	N	N474	Problem: Code 2. Yes; Ventilator (and oxygen) was incorrect, and ventilator instruction was missing. Fix: Code 2 was updated, and missing instruction added.
6	N	N477	Problem: A couple of respondents who moved out of a nursing home facility after covid started (after February, 2020) should have been asked N477 but did not. Fix: Fixed logic to ask these Respondents N477 under these conditions.
6	N	N490	Problem: Don't Knows at N489 were falling through to N490 though they should not. Fix: Fixed logic to skip Don't Knows at N489 over N490.
6	P	P181, P182 and P199	Problem: Flow for the 3 refusals rule was not working properly -- if there are 3 refusals in a row for this section, they should jump out of the section, but were not. Fix: Fixed refusal assignment for P181, P182 and P199.
6	P	P181	Problem: Flow for the 3 refusals rule was not working properly -- if there are 3 refusals in a row for this section, they should jump out of the section, but were not. Fix: Added some missing code at P198.
6	S	S039, S048	Problem: In Web, the S039 and S048 Other Specifys were not allowing you to specify when other response options were also selected unless you moved forward then backed up.

			Fix: Made some template adjustments so this would work properly.
5	N	N037	Problem: Error with flow leading up to N037. Some respondents getting N037 when they shouldn't and some not getting it when they should. Fix: Modified code to correct flow issues
5	N	N062	Problem: A few respondents skipping N062 when they shouldn't. Fix: Modified code to correct flow issues
5	J	J982	Problem: Codeframe should be multiple mention but is not. Fix: In order to prevent a harmful change, to solve this issue we added a keep to J982 but it won't be asked anymore and created a new variable J990 that is the same as J982 but with the change
4	A	A071	Problem: The option to change financial/family respondent status (A053) was incorrectly being skipped when the financial respondent's last interview year was in 2021 (X039=2021). Fix: Corrected Blaise to ask financial/family Respondent status (A053) of financial respondents who were last interviewed after 2019.
4	A2	A090	Problem: In the household member Summary (A228) there was an extra column "Lives with R" vive con Respondent in the summary that should not be there. This was only an issue for Spanish. Fix: Removed this extra column for Spanish.
4	C	C070	Problem: Question flow within the arthritis sequence was off. Fix: Corrected flow so that C070=5, Don't Know, or Refused are not asked about rheumatoid arthritis, all that get into the sequence get the new joint surgery question.
4	C	C110	Problem: New respondents were being skipped over the cholesterol question. Fix: Corrected condition so new respondents always get cholesterol question.
4	C	C117	Problem: Some exit respondents were skipping over smoking the last 2 years of their life question C117. Fix: added ask condition for C117.
4	C	C118	Problem: Exits were not being asked the new vaping sequence. Fix: Added vaping sequence for exits after C118.
4	C	C120	Problem: Respondents who report that they never smoked cigarettes (C120=95) were skipping the new vaping questions. Fix: Added the condition for these Respondents to be asked vaping questions.
4	C	C123	Problem: Respondents who no longer smoke but don't know how many cigarettes they used to smoke (C123=DK) were skipping the new vaping questions. Fix: Added the condition for these Respondents to be asked vaping questions.
4	C	C273	Problem: Respondents who reported dementia previous wave, but this interview is with a different reporter were being assigned having dementia at C273 instead of asked.

4			Fix: Added condition to ask (not assign) C273 for different reporter from previous wave.
4	C	Z288	Problem: Respondents who reported weakened immune system in previous wave were being asked this wave, but should have skipped. Fix: Fixed preload reference in the code so these Respondents will skip being asked in current wave if they reported having condition the previous wave.
4	D	D349	Problem: Some cases who refused to do the Trail Making test had valid data for timing on the seconds though they should skip the section if they refuse. Fix: Corrected so refusals at practice and main Trail Making tests (D340, D343, D346, and D349) skip to the "any problems" question, D351.
4	D	D358	Problem: Respondent was getting the mode of interview question (D358) in the wrong order, getting it directly after the aid in number use question (D356) before moving on to D200. Fix: Added some missing rules around D358 so it is always asked just before the number series.
4	G	G217_	Problem: New questions G217 and G218 had been swapped and the order was fixed in Data Model 3, but the question text was wrong - G217 should be "help with dressing" but it said "help with walking." G218 should be "help with walking" and said "help with dressing" Fix: Corrected text for both G217 and G218. G217 now says "help with dressing", and G218 now says "help with walking".
4	H	H192	Problem: Some Respondents were not getting the H assist question and they should have. Fix: Corrected the code so that all interviewer assisted interviews are asked the assist question.
4	J2	J352	Problem: Fewer Respondents seemed to get J352 than the questionnaire suggests. They should be asked of all active plans. Fix: Corrected the code so that all active plans are asked J352.
4	M	M101	Problem: New Respondents who never worked for pay but said it was not because of a health condition (M100=5). were erroneously not asked if they have any impairment or health problem that limits the kind or amount of paid work they can do (M101). Fix: Corrected so that these Respondents are asked M101.
4	M	M289_	Problem: Respondents who applied for SSDI but only (M283=1) were erroneously asked about SSI (M289). Fix: Corrected so these Respondents are not asked M289.
4	N	N477	Problem: Respondents who live in a nursing home and have not reported moving out of that nursing home were erroneously asked if concern about COVID-19 was a reason for moving out of the nursing home (N477). Fix: Corrected so these Respondents are not asked N477.
4	P	P009	Problem: P009 – the summary variable that keeps track of whether or not the respondent's first three answers, whatever they may be, are all "don't know" or "refused – was not always correctly assigning, sometimes assigning a 0 when at least 1 of the first 3 questions had a valid value.

3	A		Fix: Corrected so P009 is assigned 0 only when all 3 of the first 3 questions asked are either DK or RF.
3	A	A033_SpInN Home	Problem: The on-screen definition and QxQ didn't fully address questions interviewers had related to nursing homes.

3	A	A033_SpInN Home	Problem: The on-screen definition and QxQ didn't fully address questions interviewers had related to nursing homes.
			Fix: Modified the QxQ for all CAPI languages and CAWI as noted below (Change in CAPS).
			CAPI
			In order to consider that Respondent is living in a nursing home or other health care facility, all of the services listed in the definition on screen must be provided. OUR INTENTION HERE IS TO REFLECT WHAT A FACILITY PROVIDES TO ALL OR SOME OF ITS RESIDENTS, REGARDLESS OF WHETHER THE Respondent USES ANY SERVICE.
			We want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation.
			CAWI
			For this question, we are interested in long-term or permanent stays in a nursing home or other health care facilities that provide all of the services listed in the definition to SOME OR ALL OF its residents, REGARDLESS OF WHETHER YOU USE ANY SERVICE.
			Persons who are in for a short-term stay (e.g., for rehabilitation or recuperation from surgery or an illness) should answer "No" to this question.
3	A	A110TStoph ouseAssign ments	Problem: A070 was not being asked of some 2nd Respondents who were Financial Respondents which caused them to skip out of questions in section H.
			Fix: Revised rules so A070 is being asked correctly.
3	A	A124_Place Died	Problem: From field interviewers: The on-screen definition and QxQ didn't fully address questions interviewers had related to nursing homes.
			Fix: Added the following "new" QxQ (similar to parts of A167):
			CAPI
			We want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation.
			To be considered a nursing home, all of the services listed in the definition on screen must be provided. Our intention is to reflect what a facility provides to all or some of its residents, regardless of whether the Respondent uses a service or not.
3	A	A167_A028 _RInNHome	Problem: The on-screen definition and QxQ didn't fully address questions interviewers had related to nursing homes.
			Fix: Modified the QxQ for all CAPI languages and CAWI as noted below (Change in CAPS).

			CAPI We want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation. To be considered a nursing home, all of the services listed in the definition on screen must be provided. OUR INTENTION IS TO REFLECT WHAT A FACILITY PROVIDES TO ALL OR SOME OF ITS RESIDENTS, REGARDLESS OF WHETHER THE Respondent USES A SERVICE OR NOT. For other types of facilities that provide only some or none of the services, answer 'yes' to A167 and then select "assisted living" or some other type of facility in A237. If the facility provides different services to different residents or different parts of the facility, choose the type of facility in which the respondent currently lives. CAWI For this question we want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation. To be considered a nursing home, all of the services listed in the definition on screen must be provided to all or some of the residents. OUR INTENTION IS TO REFLECT WHAT A FACILITY PROVIDES, REGARDLESS OF WHETHER YOU USE ANY SERVICE. If you live in another type of facility that provides only some or none of the services, answer 'yes' to this question and then choose "assisted living" or some other type of facility in the follow-up question. If the facility you live in provides different services to different residents or different parts of the facility, choose the type of facility in which you are currently living.
3	A	A230_SpInN Home	Problem: From Field Iwers: The on-screen definition and QxQ didn't fully address questions interviewers had related to nursing homes. Fix: Added the following "new" QxQ to all relevant CAPI languages and CAWI, too (similar to parts of A167): CAPI We want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation. To be considered a nursing home, all of the services listed in the definition on screen must be provided. Our intention is to reflect what a facility provides to all or some of its residents, regardless of whether the Respondent uses a service or not. CAWI For this question we want to include only people living in a nursing home or other health care facility permanently, or at least for the long term, not people who are in for a couple of weeks recuperating from an operation.

			To be considered a nursing home, all of the services listed in the definition on screen must be provided to all or some of the residents. Our intention is to reflect what a facility provides, regardless of whether you use any service.
3	A	X029_2ndResCty	Problem: In comment analysis, found that for the last couple waves a Respondent had reported that they did not have a second residence. Blaise was copying preload and not updating the changed status to the final table. Fix: Changed to stop the assignment of a second home when Respondent no longer has a second home.
3	A, N, P	A167_A028, A124, A033, A230, N114, P032	Problem: Per Field Interviewer: The use of the term "provides" in the nursing home definition generates confusion for Respondents and interviewers since they are unsure whether we mean that the facility "is able to provide" or they "deliver" the services, as in they utilize them. Fix: Modified the definition per the below (change in CAPS) at A167_A028, A124, A033, A230, and P032 for all languages, including CAWI. (Note it was decided not to change the definition at N114): 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. Spanish: Spanish DEF: Al decir "una residencia con personal médico para personas de la tercera edad, deshabilitados y otros enfermos crónicos u otro tipo de institución de cuidado médico a largo plazo " nos referimos a un lugar que provee los siguientes servicios para algunos o todos sus residentes: administración de medicinas, asistencia y supervisión de enfermeras las 24 horas del día, asistencia en las necesidades personales, cuarto y comidas.
3	C	C321	Problem: Respondents who reported in current interview that they smoke cigarettes (C117 = 1) were skipping over the new vaping questions (starting with C321). Fix: Revised the rules so that these Respondents get the new vaping questions.
3	C	C321	Problem: Reinterview Respondents who reported in a past wave that they have smoked cigarettes (Z205=1) were skipping the question of whether they smoke cigarettes now. Fix: Revised the rules so that these Respondents were asked whether they smoke cigarettes now.
3	C	C330	Problem: Date of last covid shot was allowing out of range answers before 2020 and after the current date. Fix: Added signals for answers before 2020 and after the current date.
3	E	E081	Problem: E081 appeared to be asked when E079 = don't know, though it should have been skipped. Fix: Added condition to skip E081 when E079 = don't know.
3	E	E160_AnyKidMove	Problem: E163 appeared to be asked when it was a new cohort household, or the household changed main residence, though it should have been skipped. Fix: Added condition to skip E163 when new cohort household, or the household changed main residence.
3	G	G207_HaveDriven	Problem: When Respondents said they can't drive (C037=no), they were being asked follow-up questions about driving, though they shouldn't.

			Fix: Revised condition so only Respondents that can drive will be asked the follow-up questions about driving.
3	G	G217_	Problem: New questions G217 and G218 appeared to be swapped in order. Fix: Revised flow so G217 and G218 are asked at the correct places.
3	H	H102_	Problem: Flow issue. Too many Respondents were being skipped over H102 -- only R's who reported living in a healthcare facility at A237 were being asked H102. Fix: Revised rules for asking H102
3	H	H134	Problem: Flow issue. DEP Respondents living in other healthcare facility (A237 <> 1) were not getting the assist screen H192 Fix: Revised rules for asking assist (H192).
3	H	H166_Home Value2nd	Problem: Respondents who reported they have the same 2nd home in A were not getting into the asset reconciliation loop after H166 when they should. Fix: Removed the unnecessary conditions that were erroneously causing these R's to skip.
3	M	M160_	Problem: "special equipment" was duplicated in the question text. Fix: Fixed fill so the question now says "did you have special equipment to help you do your job?" instead of "did you have special equipment special equipment to help you do your job?".
3	M	M161_	Problem: "you with" was duplicated in the question text. Fix: Fixed fill so the question now says "did you have someone help you with the parts of your job…" instead of "did you have someone help you with you with the parts of your job…".
3	M	M214	Problem: Missing question text after "You said your employer did not provide you with". Fix: Fixed so it now fills with the missing accommodation.
3	M	M236	Problem: From interviewer feedback: We were erroneously using the current month fill for reinterviews instead of the month of their previous wave interview. Fix: Changed to use the month of their previous wave interview for reinterviews.
3	M	M265_	Problem: There were several comments indicating "Year given is before PW month/year" signals were appearing for new Respondents on "ever received" questions, understandably creating confusion. Fix: Dropped this signal for new Respondents at: M265 M269 M272 M295 M299 M302 M306 M314

			M318 M321 M328 M275 M255 M252 M249 M244 M240
3	N	N134_OutS urgLst2Yrs	Problem: Respondents who moved out of a nursing home were erroneously not being asked ask if they moved out of a nursing home after Covid started (N477-N488). Fix: Revised condition to ask N477-N488 when they moved out of a nursing home during the pandemic.
3	N	N255_N133 _WhiChldN H1_A	Problem: There were a significant amount of R's over the age of 65 not being asked new questions N486- N488, though all Respondents over 65 (exit and living) should get them. Fix: Revised condition to ask N486- N488 of anyone over 65.
3	N	N437_Howl ongDa	Problem: There was an instruction "If Respondent doesn't know the month please select a season from the bottom of the list." that needed to be dropped from the days/months hospice services were in place before Respondents death questions. Fix: Dropped instruction from N437 and N438.
3	N	N473_	Problem: The flow within the main insurance plan sequence was incorrect, and interviewer administered interviews were allowing empties at all 3 time options. Fix; Added a signal if interviewer left all 3 time options empty, and revised rules within the sequence.
3	N	N476_Teleh ealth	Problem: Exit Respondents were erroneously able to get the telehealth question (N476). Fix: Added condition to skip exit Respondents.
3	V3	V313	Problem: The variable label was incorrect. Fix: Revised label to read "Science supported"
3	V3	V318	Problem: The variable label was incorrect. Fix: Revised label to read "Quality of education"
3	V5	V520_	Problem: Flow issue. V520 was asked when employer allows a flexible schedule, though it is only supposed to be asked if Respondents employer does not allow a flexible schedule (V501 =5). Fix: Revised rules for asking V520 is only asked if Respondents employer does not allow a flexible schedule.
3	V5	V530_	Problem: Flow issue. Respondents current work status was a condition for getting V530, but should not be. Fix: Dropped the current work status as a condition for getting V530.

2	A	PUA158_NewCohortNotEligable	Problem: Eligible Respondent case was terminated Single Respondent with preloaded YOB 1958. Updated YOB is 1970. This case was being terminated even though Respondent had an eligible YOB. Normally, this shouldn't be possible because Single Respondent with preloaded YOB that is ineligible should be terminated in the screener but this case is one of the EGENX cases that had a spouse that was removed. Fixes: Flow corrected for special Gen Xers: 1. Added a new code (2) to the preload variable Z290. The new code will be assigned to 2019 Egenx cases where the spouse was dropped (about 80 HHs). 2. Added a condition around A158 that makes any HHs where Z290=2 eligible regardless of their age. If they are truly not age eligible, they will be dropped or turned into a pretest case by DPT.
2	B	B014	Problem: From above, needed to add reference to Z290=2 to other fields that use Z290. Fix: Added reference to code 2 at: B014 B028 B035 B039 B041 B078_B047 B054
2	B	B014	Problem: The first interviewer instruction was displayed in Spanish for English language. Fix: Instruction changed to English
2	C	C303	Problem: Time spent sitting could only be answered either in minutes or hours, not a combination, like 4.5 hours. Fix: Now allow both minutes and hours
2	D	D104	Problem: In Word List, unable to delete X-wrong word when accidentally entered more than once. Fix: This was accidentally introduced when fixing another issue, but has been fixed so it is again working correctly.
2	D	D242_NSIntro_4	Problem: Number series instructions for interviewer assisted were referring to 'empty boxes' instead of 'blank'. Fix: Corrected text.
2	EOI	W798_VBS	Problem: 'Thank you for agreeing to participate'/ExamOne's appointment scheduling statement was missing for Interviewer assisted interviews. Fix: Added statement English: Thank you for agreeing to participate. In 1-2 weeks an ExamOne representative will contact you to schedule an appointment. If you have further questions about this request, you may contact the HRS project team toll free at the University of Michigan at 1-866-611-6476

2			(For Spanish, only difference is the telephone number 1-800-643-7605)
2	F and C	F251	Problem: New question F251 (Any family or friends die from Covid) is very abrupt and out of place where it appears at the end of Section F. Decision to move this question to Section C, right after C333 administered to everyone, except living and exit proxies. Fix: Moved F251 to Section C, right after C333.
2	G	G041_DiffMeals	Problem: Intro text that was supposed to have been moved from dropped question G040 was not showing at G041 for CAPI or CAWI. Fix: Added intro text from dropped G040.
2	J2	J352	Problem: The [have you been/were you] had been accidentally commented out. Fix: Added fill back.
2	V5	V000_ModuleIntro	Problem: Respondents over 65 were getting the Module 5 intro,V000, though they should have been skipped completely over the section. Fix: Added condition to jump Respondents over 65 over V000.
2	W	W311_IWMODE	Problem: CAWIs were erroneously getting W311. Fix: Added condition to jump CAWI Respondents.
2	W	W311_IWMODE	Problem: Ineligible Respondents were erroneously getting W311. Fix: Added condition to jump Ineligible Respondents.