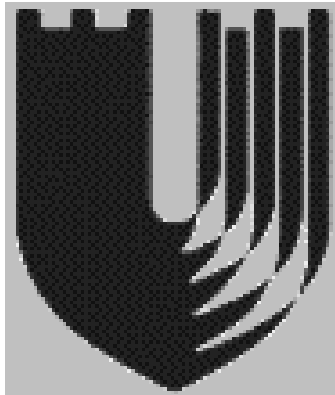


ADAMS ID: \_ \_ \_ \_ \_

# HRS: Aging, Demographics, and Memory Study



## ABOUT THIS QUESTIONNAIRE

This questionnaire is a part of the *Health and Retirement Study: Aging, Demographics, and Memory Study (HRS: ADAMS)*. Your answers to these questions will provide us with important information about your friend or relative as well as about your experience in caring for him/her. We greatly value your participation, and we hope that you will find this questionnaire interesting to complete. Some of the questions may seem similar to ones that you have already been asked, but it is important to our research that you answer all of them. The questionnaire is likely to take about 20 minutes to complete.

Most of the questions can be answered by putting a check in the box that appears in front of your response; just one response per question, unless you are instructed otherwise. If your response doesn't match any of those shown, please write it in the margin next to the question. Some questions may not apply to you, and you will be instructed to skip them. When this occurs, you will find instructions printed in **BOLD CAPITAL LETTERS** to guide you to the next appropriate question number. When no special instructions are given, please continue with the next question in the booklet.

Completion of this questionnaire is voluntary and you may skip over any questions that you would prefer not to answer. A Department of Health and Human Services Certificate of Confidentiality covers this research in order to help ensure your privacy. This Certificate can help protect the investigators from being forced to release any research information that identifies you. We must report credible evidence of serious harm or abuse to any person to the authorities, but the questionnaire does not include any questions about such topics.

We would like to know how long it takes to complete the questionnaire. So please write the time that you begin and finish in the spaces provided. Thank you!

The time is now: \_\_\_\_\_ ☐ AM  
☐ PM

When you see the words “friend or relative” used in this questionnaire, please think only about the person being visited today.

To begin, we have some questions about activities that your friend or relative might do. Please check the one response per question that fits best.

1. How often does your friend or relative watch a TV show or news program?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

2. How often does your friend or relative listen to a program on the radio?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

3. How often does your friend or relative read a newspaper or magazine?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

4. How often does your friend or relative read a book?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

5. How often does your friend or relative play board or card games?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**6.** How often does your friend or relative do jigsaw puzzles or crossword puzzles?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**7.** How often does your friend or relative do arts and crafts?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**8.** How often does your friend or relative write letters or cards?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**9.** How often does your friend or relative use a computer?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**10.** How often does your friend or relative discuss current events or topics of general interest?

- ☐ Daily or almost daily
- ☐ Several times a month
- ☐ Several times a year
- ☐ Rarely or never

**11.** How would you rate your friend or relative's memory at the present time?

- ☐ Excellent
- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Poor

**12.** How would you rate your friend or relative in making judgments and decisions?

- ☐ Excellent
- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Poor

**13.** How would you rate your friend or relative's ability to organize his/her daily activities?

- ☐ Excellent
- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Poor

Now we want you to remember what your friend or relative was like two years ago and to compare that with what he/she is like now. Below are situations where your friend or relative has to use his/her memory or intelligence, and we would like you to indicate whether this has improved, stayed the same, or gotten worse in each situation over the past two years. Note the importance of comparing his/her present performance with two years ago. So if two years ago your friend or relative always forgot where things were left, and he/she still does, then this would be considered “not much change.”

**14.** Compared with two years ago, how is your friend or relative at remembering things about family and friends, such as occupations, birthdays and addresses?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**15.** Compared with two years ago, how is your friend or relative at remembering things that have happened recently?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**16.** Compared with two years ago, how is your friend or relative at recalling conversations a few days later?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**17.** Compared with two years ago, how is your friend or relative at remembering his/her address or phone number?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**18.** Compared with two years ago, how is your friend or relative at remembering what day and month it is?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**19.** Compared with two years ago, how is your friend or relative at remembering where things are usually kept?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**20.** Compared with two years ago, how is your friend or relative at remembering where to find things that have been put in a different place than usual?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**21.** Compared with two years ago, how is your friend or relative at knowing how to work familiar machines around the house?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**22.** Compared with two years ago, how is your friend or relative at learning to use a new gadget or machine around the house?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**23.** Compared with two years ago, how is your friend or relative at learning new things in general?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**24.** Compared with two years ago, how is your friend or relative at following a story in a book or on TV?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse



**25.** Compared with two years ago, how is your friend or relative at making decisions on everyday matters?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**26.** Compared with two years ago, how is your friend or relative at handling money for shopping?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**27.** Compared with two years ago, how is your friend or relative at handling financial matters, that is, the pension or dealing with the bank?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**28.** Compared with two years ago, how is your friend or relative at handling other everyday arithmetic problems, such as, knowing how much food to buy, knowing how long between visits from family or friends?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

**29.** Compared with two years ago, how is your friend or relative at using his/her intelligence to understand what's going on and to reason things through?

- ☐ Much better
- ☐ A bit better
- ☐ Not much change
- ☐ A bit worse
- ☐ Much worse

Now we would like you to think about any difficulties your friend or relative may have.

**30.** Does your friend or relative have any difficulty with the following because of a physical, mental, emotional, or memory problem?

	YES	NO
Getting across a room .....	<input type="checkbox"/>	<input type="checkbox"/>
Dressing .....	<input type="checkbox"/>	<input type="checkbox"/>
Bathing.....	<input type="checkbox"/>	<input type="checkbox"/>
Eating .....	<input type="checkbox"/>	<input type="checkbox"/>
Getting out of bed .....	<input type="checkbox"/>	<input type="checkbox"/>
Using the toilet.....	<input type="checkbox"/>	<input type="checkbox"/>
Preparing meals .....	<input type="checkbox"/>	<input type="checkbox"/>
Shopping for groceries.....	<input type="checkbox"/>	<input type="checkbox"/>
Making telephone calls .....	<input type="checkbox"/>	<input type="checkbox"/>
Taking medications.....	<input type="checkbox"/>	<input type="checkbox"/>
Managing money .....	<input type="checkbox"/>	<input type="checkbox"/>

**31.** Does your friend or relative need to be watched over or supervised to ensure his/her personal safety or the safety of others?

- ☐ Yes
- ☐ No

**32.** Must someone stay with him/her to provide reassurance or to make sure that nothing goes wrong?

☐ Yes

☐ No

**★IF ALL ANSWERS TO QUESTIONS 30 THROUGH 32 ARE “NO,” SKIP TO QUESTION 69**

We are interested in learning about two types of care that people may provide to individuals with a health or memory problem. In the questions below, “active help” means tasks that you might perform such as helping your friend or relative get across a room, cooking meals for him/her, or helping him/her with financial matters. The other type of care, “supervision,” means staying nearby your friend or relative to ensure his/her safety, to provide reassurance, or to make sure that nothing goes wrong.

**33.** In the past month, have you provided care to your friend or relative by actively helping with any of the tasks in Question 30 **or** by supervising him/her to ensure safety, provide reassurance, or to make sure that nothing goes wrong?

☐ Yes ➞ **GO TO QUESTION 34**

☐ No ➞ **SKIP TO QUESTION 62**

**34.** Are you the person most responsible for the care of your friend or relative?

☐ Yes ➞ **GO TO QUESTION 35**

☐ No ➞ **SKIP TO QUESTION 36**

**35.** If you were unable to provide this care for a week or so, (for example, due to illness), is there someone who would care for your friend or relative?

☐ Yes

☐ No

**36.** During the last month, on about how many days did you provide active help to your friend or relative because of his/her health or memory problem?

\_\_\_\_\_days ⇨ **IF 0 DAYS, SKIP TO QUESTION 39**

**37.** On the days you did this, about how many hours per day was that?

\_\_\_\_\_hours

**38.** How long have you been providing this level of active help?

- ☐ Less than 1 month
- ☐ Between 1 and 6 months
- ☐ Between 6 months and 1 year
- ☐ Between 1 year and 2 years
- ☐ More than 2 years

**39.** During the last month, on about how many days did you supervise your friend or relative to ensure safety, provide reassurance, or to make sure that nothing went wrong?

\_\_\_\_\_days ⇨ **IF 0 DAYS, SKIP TO QUESTION 42**

**40.** On the days you did this, about how many hours per day was that?

\_\_\_\_\_hours

**41.** How long have you been providing this level of supervision?

- ☐ Less than 1 month
- ☐ Between 1 and 6 months
- ☐ Between 6 months and 1 year
- ☐ Between 1 year and 2 years
- ☐ More than 2 years

**42.** How much of a physical strain is it on you to help your friend or relative with any of the following activities: getting across a room, dressing, bathing, eating, getting out of bed, or using the toilet?

- ☐ No physical strain
- ☐ Some physical strain
- ☐ A lot of physical strain
- ☐ I don't help with any of these

**43.** How much of a physical strain is it on you to help your friend or relative with any of the following activities: preparing meals, shopping for groceries, making telephone calls, taking medications, or managing money?

- ☐ No physical strain
- ☐ Some physical strain
- ☐ A lot of physical strain
- ☐ I don't help with any of these

**44.** How much of a physical strain is it on you to stay with or supervise your friend or relative?

- ☐ No physical strain
- ☐ Some physical strain
- ☐ A lot of physical strain
- ☐ I don't do this

**45.** How much of a mental or emotional strain is it on you to help your friend or relative with any of the following activities -- either directly by doing it yourself, or indirectly by arranging for someone else to do it: getting across a room, dressing, bathing, eating, getting out of bed, or using the toilet?

- ☐ No mental or emotional strain
- ☐ Some mental or emotional strain
- ☐ A lot of mental or emotional strain
- ☐ I don't help with any of these

**46.** How much of a mental or emotional strain is it on you to help your friend or relative with any of the following activities – either directly by doing it yourself, or indirectly by arranging for someone else to do it: preparing meals, shopping for groceries, making telephone calls, taking medications, managing money?

- ☐ No mental or emotional strain
- ☐ Some mental or emotional strain
- ☐ A lot of mental or emotional strain
- ☐ I don't help with any of these

**47.** How much of a mental or emotional strain is it on you to stay with or supervise your friend or relative – either directly by doing it yourself or indirectly by arranging for someone else to do it?

- ☐ No mental or emotional strain
- ☐ Some mental or emotional strain
- ☐ A lot of mental or emotional strain
- ☐ I don't do this

Now we have a few questions about your feelings about providing care for your friend or relative because of his/her health, mental, emotional, or memory problem.

**48.** Has providing care made you feel more useful?

- ☐ Yes
- ☐ No

**49.** Has providing care made you feel closer to your friend or relative?

- ☐ Yes
- ☐ No

**50.** Has providing care made you feel good about yourself?

- ☐ Yes
- ☐ No

**51.** Has providing care allowed you to learn new skills?

- ☐ Yes
- ☐ No

**52.** In general, do you feel able to handle most problems in the care of your friend or relative?

- ☐ Yes
- ☐ No

**53.** Do the things you do for your friend or relative keep him/her from getting worse?

- ☐ Yes
- ☐ No

**54.** Sometimes people must make adjustments to their schedules to care for others. In the last year, did providing help or supervision for your friend or relative cause you to change your daily work schedule, such as going to work late, leaving early, or taking time off?

- ☐ Yes ➞ **GO TO QUESTION 55**
- ☐ No ➞ **SKIP TO QUESTION 56**

**55.** Over the past year, on average, how many hours of work per week did you miss for this reason?

\_\_\_\_\_ hours per week

**56.** In the last year, did providing care for your friend or relative cause you to give up work entirely?

- ☐ Yes
- ☐ No

**57.** In the last year, did providing care for your friend or relative cause you to reduce leisure time or vacations?

- ☐ Yes
- ☐ No

**58.** In the last year, did providing care for your friend or relative cause you to reduce the time spent on hobbies or your own activities?

- ☐ Yes
- ☐ No

**59.** In the last year, did providing care for your friend or relative cause you to spend less time helping or being with other family members?

- ☐ Yes
- ☐ No

**60.** In the last year, did providing care for your friend or relative put a strain on your marriage or other family relationships?

- ☐ Yes
- ☐ No

**61.** Have you ever had instruction in how to provide care to someone with a memory problem?

- ☐ Yes
- ☐ No

The next set of instructions is about paid care that your friend or relative may receive.

**62.** Has anyone ever arranged for a paid helper to care for your friend or relative?

- ☐ Yes ➞ **SKIP TO QUESTION 64**
- ☐ No ➞ **GO TO QUESTION 63**

**63.** What is the main reason that you haven't arranged for a paid helper to care for your friend or relative? (**THEN SKIP TO QUESTION 69**)

- ☐ Paid help is unnecessary
- ☐ Paid help is too expensive
- ☐ Paid help is not of good enough quality
- ☐ Paid help is not available
- ☐ My friend or relative would not be comfortable with someone else
- ☐ Other\_\_\_\_\_



**64. What type of help was provided? (CHECK ALL THAT APPLY)**

- ☐ Homemaker services (for example, help with the cooking or cleaning)
- ☐ Personal services (for example, help with the dressing or bathing)
- ☐ Nursing services
- ☐ General supervision
- ☐ Other \_\_\_\_\_

**65. About how much was paid out-of-pocket (that is, the amount paid that was not covered by insurance) for this help in the past year?**

- ☐ \$0
- ☐ \$1 - \$250
- ☐ \$251 - \$500
- ☐ \$501 - \$2,500
- ☐ \$2,501 - \$5,000
- ☐ \$5,001 - \$10,000
- ☐ More than \$10,000

**66. Were any of the costs for a paid helper covered by insurance?**

- ☐ Yes ➞ **GO TO QUESTION 67**
- ☐ No ➞ **SKIP TO QUESTION 68**

**67. What kind of insurance helped pay the costs of a paid helper for your friend or relative? (CHECK ALL THAT APPLY)**

- ☐ Medicare
- ☐ Medicaid
- ☐ Private insurance
- ☐ Other \_\_\_\_\_

**68.** How did you find information on these paid helpers? (**CHECK ALL THAT APPLY**)

- ☐ Social Worker
- ☐ Doctor
- ☐ Friend
- ☐ Organization
- ☐ Relative
- ☐ Yellow pages
- ☐ Internet
- ☐ Other \_\_\_\_\_
- ☐ Someone else arranged for the paid helper

**69.** During the last month, on about how many days did you provide transportation (for instance, to a doctor's appointment or to a store) for your friend or relative?

\_\_\_\_\_ days ☞ **IF 0 DAYS, SKIP TO QUESTION 71**

**70.** On the days you did this, about how many hours per day was that?

\_\_\_\_\_ hours

**71.** How many times has your friend or relative seen a doctor in the past year?

\_\_\_\_\_ times ☞ **IF 0 DAYS, SKIP TO QUESTION 73**

**72.** About how much was paid out-of-pocket (that is, the amount paid that was not covered by insurance) for these doctor's bills in the past year?

- ☐ \$0
- ☐ \$1 - \$100
- ☐ \$101 - \$250
- ☐ \$251 - \$500
- ☐ \$501 - \$2,500
- ☐ \$2,501 - \$10,000
- ☐ More than \$10,000

**73.** Has your friend or relative had medical tests such as blood tests, X-rays, or CAT scans, in the past year?

- ☐ Yes ➞ **GO TO QUESTION 74**
- ☐ No ➞ **SKIP TO QUESTION 75**

**74.** About how much was paid out-of-pocket for these kinds of tests in the past year?

- ☐ \$0
- ☐ \$1 - \$100
- ☐ \$101 - \$250
- ☐ \$251 - \$500
- ☐ \$501 - \$2,500
- ☐ \$2,501 - \$10,000
- ☐ More than \$10,000

**75.** Has your friend or relative been a patient in a hospital overnight in the past year?

- ☐ Yes ➞ **GO TO QUESTION 76**
- ☐ No ➞ **SKIP TO QUESTION 78**

**76.** Altogether, how many nights has your friend or relative been a patient in a hospital in the past year?

\_\_\_\_\_ nights

**77.** About how much was paid out-of-pocket (that is, the amount paid that was not covered by insurance) for these hospital stays in the past year?

- ☐ \$0
- ☐ \$1 - \$250
- ☐ \$251 - \$500
- ☐ \$501 - \$2,500
- ☐ \$2,501 - \$5,000
- ☐ \$5,001 - \$10,000
- ☐ \$10,001 - \$25,000
- ☐ More than \$25,000

**78.** Has your friend or relative been a patient in a nursing home or other long-term care facility in the past year?

- ☐ Yes ➞ **GO TO QUESTION 79**
- ☐ No ➞ **SKIP TO QUESTION 81**

**79.** Altogether, how many nights has your friend or relative been a patient in a nursing home in the past year?

\_\_\_\_\_ nights

**80.** About how much was paid out-of-pocket (that is, the amount paid that was not covered by insurance) for these nursing home stays in the past year?

- ☐ \$0
- ☐ \$1 - \$250
- ☐ \$251 - \$500
- ☐ \$501 - \$2,500
- ☐ \$2,501 - \$5,000
- ☐ \$5,001 - \$10,000
- ☐ \$10,001 - \$25,000
- ☐ More than \$25,000

**81.** Has your friend or relative used prescription medications during the past year?

- ☐ Yes ➞ **GO TO QUESTION 82**
- ☐ No ➞ **SKIP TO QUESTION 83**

**82.** On average, about how much was paid out-of-pocket (that is, the amount paid that was not covered by insurance) per month for these prescriptions in the past year?

- ☐ \$0
- ☐ \$1 - \$5 per month
- ☐ \$6 - \$10 per month
- ☐ \$11 - \$20 per month
- ☐ \$21 - \$100 per month

- ☐ \$101 - \$500 per month
- ☐ More than \$500 per month

To conclude, we have a few more questions about your own situation.

**83.** Overall, how would you rate your health?

- ☐ Excellent
- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Poor

**84.** Over the last year, have you: **(PLEASE CHECK “YES” OR “NO” FOR EACH ITEM)**

	YES	NO
Felt more stressed than usual .....	<input type="checkbox"/>	<input type="checkbox"/>
Gotten less exercise than usual .....	<input type="checkbox"/>	<input type="checkbox"/>
Gotten less sleep than usual .....	<input type="checkbox"/>	<input type="checkbox"/>
Gotten less rest than you needed .....	<input type="checkbox"/>	<input type="checkbox"/>
Not had enough time to go to a physician .....	<input type="checkbox"/>	<input type="checkbox"/>
Not been able to slow down when you were sick .....	<input type="checkbox"/>	<input type="checkbox"/>

Now think about the past week and the feelings you have experienced. Please tell us if each of the following was true for you much of the time this past week.

**85.** Much of the time during the past week you felt depressed.

- ☐ Yes
- ☐ No

**86.** Much of the time during the past week you were happy.

- ☐ Yes
- ☐ No

**87.** Much of the time during the past week you felt lonely.

- ☐ Yes
- ☐ No

88. Much of the time during the past week you enjoyed life.

☐ Yes

☐ No

89. Much of the time during the past week you felt sad.

☐ Yes

☐ No

90. Do you currently do any work for pay?

☐ Yes ➞ **GO TO QUESTION 91**

☐ No ➞ **SKIP TO QUESTION 94**

91. On average, how many hours per week do you work for pay?

\_\_\_\_\_ hours per week

92. In the past year, about how many weeks did you work for pay?

\_\_\_\_\_ weeks per year

93. About how much did you earn on all jobs in the last year, before taxes?

\$\_\_\_\_\_ ➞ **SKIP TO QUESTION 95**

94. If you were to take a job now, what do you think would be your approximate hourly pay?

\$\_\_\_\_\_ per hour

95. What is your age?

\_\_\_\_\_ years

96. Are you male or female?

☐ Male

☐ Female

**97.** What is the highest level of education you completed?

- ☐ No formal education
- ☐ Grades 1-8
- ☐ Some high school
- ☐ High school graduate
- ☐ Some college
- ☐ College graduate
- ☐ Post college

**98.** Do you consider yourself Hispanic or Latino/Latina?

- ☐ Yes
- ☐ No

**99.** Do you consider yourself primarily White or Caucasian, Black or African-American, American Indian, Asian, or something else?

- ☐ White/Caucasian
- ☐ Black/African American
- ☐ American Indian/Alaskan Native
- ☐ Asian/Pacific Islander
- ☐ Other \_\_\_\_\_

**100.** What best describes your current marital status?

- ☐ Married
- ☐ Never married
- ☐ Living with partner
- ☐ Separated
- ☐ Divorced
- ☐ Widowed

**101.** What is your relationship to the person we are visiting today?

I am his/her: \_\_\_\_\_



**102.** Do you currently live with this friend or relative?

- ☐ Yes
- ☐ No

**103.** About how long have you known him or her?

\_\_\_\_\_ years

THANK YOU VERY MUCH for answering our questions. Please note the current time in the space provided and then use the area below to add any comments or additional information that you think we should know.

The time is now: \_\_\_\_\_ ☐ AM  
☐ PM

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