

HRS 2020 -- SECTION A: COVERSHEET
FINAL VERSION -- 04/29/2020

NOTE ABOUT BRANCHPOINTS:

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

NOTE ABOUT COLORS:

ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.

ALL TEXT IN FUCHSIA IS SPECIFIC TO THE EXIT INTERVIEW.

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

NOTE ABOUT BOLD/UNDERLINE TEXT:

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

NOTE ABOUT EXIT INTERVIEW Rs:

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

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

NOTE ABOUT NEW COHORTS:

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

A165_A013
Suspend Clone

Read upon resuming from any suspended lw session:

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

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

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

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

Read upon resuming from any suspended lw session:

As we've mentioned before, this study is interested in learning about important aspects of peoples' lives such as their health, financial and family situations. This interview is completely voluntary. If you come to any question that you don't want to answer, just leave it empty and go on to the next question.

Your identity as a participant and any personally identifying information you provide will be kept confidential.

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

Read upon resuming from any suspended Iw session:

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

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

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

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

Introduction and Navigation for CAWI interview

A000_1 BRANCHPOINT: IF THIS IS A CAPI IW, GO TO A006

A000_1

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

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

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

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

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

A000_2

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

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

A006

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

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

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

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

Are you [R FNAME]?

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

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

1. YES.....GO TO A007 BRANCHPOINT

5. NO

A006_ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A006=5, ASK

ELSE: GO TO A007 Branchpoint.

A006_Abort
screen

IF R CONFIRMATION IS NO (A006=5):

Thank you. An interviewer will contact [Rname] to schedule an interview.

IF R CONFIRMATION IS SKIPPED (A006=EMPTY):

We are not able to complete your interview at this time. An interviewer from the University of Michigan will contact you to set up an appointment.

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

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

ELSE, GO TO A002

A007

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

[INSTR: IS [R FNAME] LIVING?]

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

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

CORE:

1. YES

5. NO

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

EXIT:

1. YES

5. NO

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

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

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

A002

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

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

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

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

1. YES

NOTE: IF THE PERSON BEING INTERVIEWED IS NOT THE CORRECT RESPONDENT, THE INTERVIEWER IS GIVEN THE FOLLOWING INSTRUCTION:

"SUSPEND THIS CASE. GO BACK TO SURVEYTRAK"

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

A008/A188 BRANCHPOINT: IF THIS IS A CAWI INTERVIEW, ASSIGN PRELOADED VALUE(x060) *and* GO TO A155 BRANCHPOINT

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

A008/A188

[INSTR: PLEASE SELECT SEX]

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

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

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

1. MALE
2. FEMALE

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

A008 ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A008 IS EMPTY, ASK

ELSE: GO TO A155 Branchpoint.

Abort screen

We are not able to complete your interview at this time. An interviewer from the University of Michigan will contact you to set up an appointment.

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

A155/A009

[INSTR: DESIGNATE TYPE OF INTERVIEW:]

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

[INSTR: DESIGNATE TYPE OF INTERVIEW:]

CORE

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

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

EXIT

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

NOTE: IF THIS IS THE FIRST R (SCVXR1_R2=1) and NOT A SELF INTERVIEW (A009/A155 NOT 1), THIS MESSAGE WILL APPEAR TO THE INTERVIEWER:

You are starting to conduct a proxy interview for the 1st R. If this is a coupled household and you know that the other member will do a self interview, you must do that self-interview first. Otherwise, continue with the proxy interview.

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

A215

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

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

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

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

1. YES
5. NO

Information about proxy, if any (A010-A105)

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

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

A010

{CORE AND EXIT}

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

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

OTHERWISE:

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

FOR ALL Rs {CORE AND EXIT}:

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

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

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

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

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

A103

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

RELATION MAIN CODE

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

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

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

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

A180/A181

Which child?

CHILD & SPOUSE/PARTNER NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

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

[ROWS PROVIDED BY BLAISE AS NECESSARY]

97. NOT ON LIST

DK [HIDE]

RF [HIDE]

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

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

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

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

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

A105

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

PROXY'S NAME _____

DK [HIDE]

RF [HIDE]

A219

[INSTR: Record or ask if uncertain:

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

1. YES, PROXY IS 18 OR OLDER

5. NO, PROXY IS UNDER 18

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

End information about proxy

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

A164_A011

[INSTR: Do you have reason to think that [R FNAME] would have difficulty completing this interview because of cognitive limitations?]

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

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

Language and introductions (A012-A013)

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

A012

[INSTR: SELECT ENGLISH OR SPANISH]

1. ENGLISH
2. SPANISH

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

NOTE: AFTER THIS QUESTION (A012) THE LANGUAGE SWITCH IS THEN SET TO GOVERN THE ENTIRE REMAINDER OF THE INTERVIEW, BASED ON A COMBINATION OF THESE THREE VARIABLES:

A012_LangSwitch = {{1. ENGLISH} or {2. SPANISH}}

and

{A009_SelfProxy = {{1. SELF} or {2. PROXY, SPOUSE/PARTNER IS REPORTER} or {3. PROXY, NON-SPOUSE/PARTNER IS REPORTER}}

and/or

A007TRAlive_A = {5. NO}}

LANGUAGE:

CORENG (CORE ENGLISH) = {A012=ENGLISH and A009=SELF}

CORSPN (CORE SPANISH) = {A012=SPANISH and A009=SELF}

PRXENG (PROXY ENGLISH/LIVING PROXY) = {A012=ENGLISH and A009={{2. PROXY, SPOUSE/PARTNER IS REPORTER} or {3. PROXY, NON-SPOUSE/PARTNER IS REPORTER}}} and {A007 NOT NO}}

PRXSPN (PROXY SPANISH) = {A012=SPANISH and A009={{2. PROXY, SPOUSE/PARTNER IS REPORTER} or {3. PROXY, NON-SPOUSE/PARTNER IS REPORTER}}} and {A007 NOT NO}}

EXTENG (EXIT ENGLISH) = {A012=ENGLISH and A007=NO}

EXTSPN (EXIT SPANISH) = {A012=SPANISH and A007=NO}

A165_A013

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

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

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

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

READ TO ALL R'S:

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

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

[INSTR: SELECT '1' TO CONTINUE.]

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

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

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

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

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

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

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

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

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

READ TO ALL R'S:

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

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

[INSTR: SELECT '1' TO CONTINUE.]

1. CONTINUE

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

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

A013

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

INSTR: Press '1' or '5' as appropriate to confirm that you have read the above statement to the respondent.

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

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

1. CONTINUE
5. CONTINUE WITHOUT RECORDING

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

Deceased respondent questions (A121-A134)

A121 BRANCHPOINT: IF THIS IS A CORE *or* CAWI INTERVIEW, GO TO X004 BRANCHPOINT (AFTER A134)

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

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

A121

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

A122

DAY

DK [HIDE]

RF [HIDE]

A123

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

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

A124

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

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

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

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

A126

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

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

STATE _____

- 97. OTHER COUNTRY A128 _____
- DK.....GO TO A129
RF.....GO TO A129

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

A127

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

COUNTY _____

- DK
- RF

A129

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

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

STATE _____

97. OTHER COUNTRY A159 _____

DK.....GO TO A131

RF.....GO TO A131

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

A130

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

COUNTY _____

DK

RF

A131

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

1. EXPECTED

2. UNEXPECT

7. OTHER (SPECIFY) A132 _____

DK

RF

A133

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

CAUSE OF DEATH _____

DK

RF

A134

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

1. ONE OR TWO HOURS (OR NO WARNING)

2. LESS THAN A DAY

3. LESS THAN A WEEK

4. LESS THAN A MONTH

5. LESS THAN A YEAR

6. MORE THAN A YEAR

DK

RF

End deceased respondent questions

Birthdate and age of respondent

X004 BRANCHPOINT: IF THIS IS A REINTERVIEW R (Z076=1) and WE KNOW R's BIRTH YEAR FROM A PRIOR IW (X067 NOT EMPTY) and IT WAS PROVIDED BY THIS R (Z079 NOT 001), GO TO A017 BRANCHPOINT

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

X004

In what month, day and year were you born?

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

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

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

X005

MONTH

DAY

DK [HIDE]

RF [HIDE]

X067

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

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

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

A017

(RESPONDENT)

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

Are you 65 years of age or older?

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

(RESPONDENT)

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

Are you 65 years of age or older?

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

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

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

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

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

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

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

A018/A019 Branchpoint: Go to A166_A20 Branchpoint

A018/A019/A01 RAgeImpute

7:

[Go to Appendix section Birthdate and Age of Respondent Calculation and Assignments](#)

A216

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

AGE_____

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

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

IF R's AGE IS 18 OR OLDER (X067 >= 18) - GO TO A158

A217

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

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

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

End Birthdate and Age of Respondent

Marital Status Information, Coupled PW (A020-A025)

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

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

A166_A020

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

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

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

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

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

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

ASK ALL Rs:

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

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

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

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

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

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

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

ASK ALL Rs:

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

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

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

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

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

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

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

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

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

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

* ONLY DISPLAYED IF R WAS PARTNERED LAST WAVE

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.
CAWI PROMPT: "YOUR RESPONSES ARE IMPORTANT TO US. PLEASE TRY TO ANSWER ALL QUESTION.

EXIT:

- 1. YES, AND SP/PARTNER WAS LIVING WHEN R (DIED/PASSED AWAY).....GO TO A023 BRANCHPOINT
- 5. NO.....GO TO A023
- 3. THAT PARTNER BECAME R'S SPOUSE AND WAS LIVING WHEN R (DIED/PASSED AWAY).....GO TO A023 BRANCHPOINT*

* ONLY DISPLAYED IF R WAS PARTNERED LAST WAVE

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

A166_A020 ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A166_A020 IS EMPTY, ASK

ELSE: GO TO A255_A020 CONFIRMATION BRANCHPOINT

A166_A020Abort
screen

We are not able to complete your interview at this time. An interviewer will be in contact with you to schedule an appointment to complete your interview.

A255_A020 CONFIRMATION BRANCHPOINT: Ask IF CAWI INTERVIEW

ELSE, GO TO A023 BRANCHPOINT

A255_A020Confirmation

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

Is that correct?

1. YES

5. NO.....GO TO SecA_AbortScreenMessage_A255_A020

A255_A020 ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A255_A020 IS 5.NO, ASK

ELSE: GO TO A023 Branchpoint.

A255_A020Abort screen

We are not able to complete your interview at this time. An interviewer will be in contact with you to schedule an appointment to complete your interview.

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

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

A023

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

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

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

1. YES.....GO TO A024

5. NO

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

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

A202 BRANCHPOINT: IF THIS IS {A NEW COHORT INTERVIEW (X024 NOT 1) or AN EXIT INTERVIEW}, GO TO A024

A202

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

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

- 1. YES
- 5. NO

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

A024

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

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

OTHERWISE:

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

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

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

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

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

OTHERWISE:

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

IF SPOUSE/PARTNER STILL ALIVE (A023=1)

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

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

OTHERWISE:

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

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER

98. STILL LIVE TOGETHER

A025

YEAR _____

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

Nursing home and living arrangements (A028-A033)

A167_A028

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

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

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

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

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

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

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

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

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

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

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

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

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

A237 BRANCHPOINT: If A167_A028=yes then ask:

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

A237

What kind of facility is that?

- 1. Nursing home or skilled-nursing facility
- 2. Memory care center
- 3. Assisted living facility
- 4. Rehabilitation center
- 5. Retirement community
- 6. Senior living facility
- 7. Rest home
- 8. Hospital
- 9. Hospice
- 10. Other (Specify): [A238_TypeFacilityOS]

A247

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

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

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

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

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

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

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

A028

NURSING HOME ASSIGNMENT

This variable is a dichotomous indicator of whether R currently resides in a nursing home or other health care facility (or was residing in such a facility at the time of R's death.) It is based on responses to question A167/A167_A028.

Conditions for assigning nursing home status:

- | | |
|----------------------|------------------------------|
| IF A167=1 or A167=2: | A028 = 1. YES |
| IF A167=5: | A028 = 5. NO |
| IF A167=8: | A028 = 8. DK |
| IF A167=9: | A028 = 9. RF |
| IF A167=EMPTY: | A028 = EMPTY: A167 NOT ASKED |

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

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

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

A030

IF R LIVES IN A NURSING HOME (A028=1):
(Are you and your [husband/wife/partner] living in the same (nursing home/health care facility))?

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

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

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

IF R LIVES IN A NURSING HOME (A028=1):
Are you and your [husband/wife/partner] living in the same nursing home or health care facility?

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

IF THE EXIT R LIVED IN A HOSPICE AT TIME OF DEATH (A167/A167_A028=2):
Up until [he/she] went into the hospice were [you/[he/she] and [his/her] [husband/wife/partner]] living together in a house or apartment?

IF THE EXIT R LIVED IN A NURSING HOME AT TIME OF DEATH (A167/A167_A028=1):
At the time of [his/her] death were [you/[he/she] and [his/her] [husband/wife/partner]] living in the same (nursing home/health care facility)?

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

- 1. YES.....GO TO X004 BRANCHPOINT
- 5. NO
- DK [HIDE].....GO TO X004 BRANCHPOINT
- RF [HIDE].....GO TO X004 BRANCHPOINT

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

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

A031

In what month and year did you stop living together?

In what month and year did you stop living together?

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

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

MONTHLIST (Enumerated)

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

MONTH [Drop down] with Special 97 at bottom.

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

A032

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

A033

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

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

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

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

1. YES

5. NO

DK [HIDE]

RF [HIDE]

End nursing home and living arrangements

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

A034

Would you say you are [married/partnered], or are you separated?

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

1. MARRIED.....GO TO X004 BRANCHPOINT

2. SEPARATED.....GO TO A027

DK [HIDE].....GO TO X004 BRANCHPOINT

RF [HIDE].....GO TO X004 BRANCHPOINT

End marital status information, coupled PW

X004 BRANCHPOINT: IF THE DATE FOR THE BIRTHDATE IS COMPLETE THE SPOUSE AGE WILL BE CALCULATED AND A042_SpAge65, A043_SpAgeImpute, AND A044TSpAge_A THEN GO TO R GRID. OTHERWISE ASK DATE OF BIRTH

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

X004

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

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

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

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

In what month, day and year were you born?

OTHERWISE:

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

MONTH [Drop down]

X005

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

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

In what month, day and year were you born?

OTHERWISE:

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

DAY [Drop down]

DK [HIDE]

RF [HIDE]

X067

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

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

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

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

In what month, day and year were you born?

OTHERWISE:

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

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

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

IF CAWI GO TO A026 BRANCHPOINT

A042_A017

[INSTR: READ INTRO IF NECESSARY:

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

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

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

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

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

[INSTR: READ INTRO IF NECESSARY:

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

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

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

OTHERWISE:

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

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

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

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

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

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

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

ELSE, GO TO Respondents Grid X058AFName

A026

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

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

Are you now married?

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

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

Are you married to someone else?

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

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

OTHERWISE:

Are you married?

ALL:

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

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

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

IF THIS IS A REINTERVIEW HH (X024=1):
Are you married to someone else?

IF THIS IS A NEW COHORT IW (X024 NOT 1):
(We need to be sure our records are accurate. Are you now married?)

OTHERWISE:
Are you married?

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

[INSTR: PLEASE DOUBLE CHECK YOUR ANSWER TO THIS QUESTION BECAUSE ONCE YOU
ANSWER IT, YOU CANNOT BACK UP TO CHANGE IT.]
First we need to update our records. As of [PREVIOUS WAVE MONTH/YEAR/two years ago],
they show that [RFName] was not married or living with a partner. At the time [he/she]
(died/passed away), was [he/she/RFNAME] married (to someone else)?

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

1. YES.....GO TO A209 Branchpoint
5. NO

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

A026 ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A026 is empty , ASK

ELSE: GO TO A027

A026_Abort

We are not able to complete your interview at this time. An interviewer will be in contact with you to schedule an appointment to complete your interview.

A027

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

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

Are you living with a partner as if married?

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

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

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

1. YES
5. NO

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

A027 ABORT SCREEN BRANCHPOINT: IF THIS IS A CAWI IW AND A027 is empty , ASK

ELSE: GO TO A209 BRANCHPOINT

A027_Abort

We are not able to complete your interview at this time. An interviewer will be in contact with you to schedule an appointment to complete your interview.

A209 BRANCHPOINT: IF A026 OR A027 IS YES, CONTINUE

ELSE, GO TO X058AFName

A209

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

IF R IS IN A NURSING HOME (A028_RInNHome = Yes):

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

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

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

1. YES
5. NO.....GO TO A210
DK [HIDE]
RF [HIDE]

A036 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024=1) and {R {DID NOT SAY {THAT IS NEWLY MARRIED (A026 NOT 1) or DID NOT SAY IS NOW LIVING TOGETHER WITH NEW SPOUSE/PARTNER (A030 NOT 1)} and {DID NOT SAY IS NEWLY PARTNERED (A027 NOT 1), GO TO X004 (Tag#=A039) BRANCHPOINT

IF THIS IS A NEW INTERVIEW HH (X024 NOT 1) and {R IS NOT CATEGORIZED AS {PARTNERED or REPARTNERED} (A038 {NOT 3 and NOT 4}), GO TO X004 (Tag#=A039) BRANCHPOINT

A036

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

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

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

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

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

MONTH [Drop down] with Special 97 at bottom.

97. NEVER LIVED TOGETHER.....GO TO X004 BRANCHPOINT

A037

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

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

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

A045

NEW SPOUSE/PARTNER DETERMINATION

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

IF THE RESPONDENT IS:

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

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

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

A210 BRANCHPOINT: IF A209 IS NO, CONTINUE

ELSE, GO TO X004TMoBorn

A210

In what month and year did you stop living together?

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

In what month and year did you stop living together?

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

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

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

MONTH [Drop down] with Special 97 at bottom.

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

A211

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

A230

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

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

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

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

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

A231

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

- 1. [Married/Partnered].....GO TO X004 BRANCHPOINT
- 2. Separated
- DK.....Go to X004
- RF.....Go to X004

A035

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

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

A038TCouplenss
_A

A038 & X065: COUPLENESS ASSIGNMENT UPDATE

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

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

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

SCV.XSplit BRANCHPOINT: IF THIS IS A NEW INTERVIEW HH (X024 NOT 1), COMPLETE THE XSPLIT CALCULATION THEN GO TO X004 BRANCHPOINT

Xsplit

THIS IS AN ASSIGNED VARIABLE.

SCV.Xsplit: MARITAL/MORTALITY DETERMINATION OF SPLIT HOUSEHOLD

A household can be split if it is decided that two respondents, previously interviewed as in one household, no longer remain together as a couple. Then data are not shared between respondents. Interviews are conducted on each respondent independently and each of these can then acquire a new spouse/partner as a second respondent in that new household. In the case where a respondent reported that the spouse/partner has died (A023=5), independent interviews are conducted for each: as an exit interview for the deceased R and as a core interview of the surviving spouse/partner (the household was split after A025). Where the first R was reported deceased (A007=5), the household was split after A007.

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

HOUSEHOLD IS SPLIT (SCV.XSplit=1):

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

or

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

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

OTHERWISE, IF R WAS ASKED A034 or A020 (A020={1 or 3})

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

X004 (Tag#=A039) BRANCHPOINT: IF R IS NOT CURRENTLY COUPLED (A038=6), GO TO R ROSTER (X058)

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

X004

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

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

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

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

MONTH [Drop down]

X005

DAY [Drop Down]

DK [HIDE]

RF [HIDE]

X067

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

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

A042_A017

INSTR: READ INTRO IF NECESSARY:

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

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

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

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

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

INSTR: READ INTRO IF NECESSARY:

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

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

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

OTHERWISE:

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

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

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

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

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

Respondents grid questions (X058-A047)

A042/A043/A04

4

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

A043/A044 ARE VARIABLES WHERE THE R's SPOUSE's/PARTNER's EXACT OR IMPUTED AGE IS STORED BASED ON INFORMATION PROVIDED IN A PRIOR WAVE OR ON INFORMATION PROVIDED IN THIS IW AT QUESTIONS X004, X005 AND X067 (CORRESPONDING TO TAG#s A039, A040 AND A041, RESPECTIVELY). IF NEITHER OF THESE SOURCES PROVIDES AT LEAST A BIRTH YEAR, THEN THE AGE IS IMPUTED FROM A042.

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

Screen Layout for R-Grid

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

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

X058

INSTR: Please ask or confirm.

INSTR: Please review the below information we have for [Fill: Fill: R FIRST NAME R LAST NAME] [S HWPS] and make corrections as necessary.

INSTR: If necessary, verify spelling of [R FNAME/SPP FNAME]'s first name.

INSTR: If there is more than a 5-year discrepancy between [R FNAME/SPP FNAME]'s year of birth and what is displayed, verify that this information is for the correct [R FNAME/SPP FNAME].

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

IF THIS IS A NEW SPOUSE/PARTNER:

INSTR: Please fill in the below information for [Fill: R FIRST NAME R LAST NAME]'s new [Fill: SPOUSE/PARTNER].

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

IF THIS IS AN UNCOUPLED R OR AN R WHO IS COUPLED WITH THE SAME SPP AS PRIOR WAVE:
[INSTR: PLEASE TAKE A MOMENT TO REVIEW THE BELOW INFORMATION WE HAVE FOR YOU AND MAKE CORRECTIONS AS NECESSARY. WHEN YOU ARE FINISHED, SELECT "NEXT" TO CONTINUE.]

IF THIS IS THE PW SPOUSE LINE:

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

IF THIS IS A NEW SPOUSE LINE:

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

FIRST NAME _____

DK [HIDE]

RF [HIDE]

X017

CAPI:

INSTR: If necessary, verify spelling of [R/SPP FNAME]'s last name .

IF THIS IS A NEW SPOUSE/PARTNER:

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

LAST NAME _____

DK [HIDE]

RF [HIDE]

X060

CAPI:

INSTR: If necessary, verify [R/SPP FNAME]'s sex.

IF THIS IS A NEW SPOUSE/PARTNER:

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

SEX [Drop down]

1. MALE

2. FEMALE

X067 BRANCHPOINT: IF THIS IS A CAWI INTERVIEW, GO TO A047 BRANCHPOINT
IF THIS IS A CAPI INTERVIEW, GO TO A227

A227

(IS YEAR OF BIRTH CORRECT?)

YEAR OF BIRTH: [YOB FILL]

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

1. YES

5. NO

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

A047

R ROSTER CONFIRM:

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

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

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

R's NAME: R's FIRST NAME

R's gender: R's gener

IS R ALIVE?: (per A007)

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

SPOUSE's/PARTNER's FIRST NAME

IW TYPE: (per A009)

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

Next are some questions about changes in your housing location.

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

1. CONTINUE

DK [HIDE]

RF [HIDE]

End respondents grid questions

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

PuConfirmation

Confirmation: Second r roster confirm:

[INSTR: PLEASE CONFIRM THAT THE FOLLOWING INFORMATION IS CORRECT. IF YES, ENTER '1' TO CONTINUE.]INSTR: If living status is incorrect, suspend the case and start over.

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

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

R's NAME: R's FIRST NAME
IS R ALIVE?: (per A007)
R's COUPLENESS STATUS: (per A038)
(SP/PARTNER NAME:) CURRENT SPOUSE's/PARTNER's FIRST NAME
IW TYPE: (per A009)
R LIVES IN A NURSING HOME OR OTHER FACILITY: (per A028)

Please select "Next" to proceed.

Confirmation SECOND R ROSTER CONFIRM:

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

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

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

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

R's NAME: R's FIRST NAME
IS R ALIVE?: (per A007)
R's COUPLENESS STATUS: (per A038) (SP/PARTNER NAME:) CURRENT
SPOUSE's/PARTNER's FIRST NAME
IW TYPE: (per A009)
R LIVES IN A NURSING HOME OR OTHER FACILITY: (per A028)

1. CONTINUE

DK [HIDE]

RF [HIDE]

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

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

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

A050

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

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

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

Financial-Family assignment (A051-A055)

A051/A052

A051/A052 FINANCIAL/FAMILY R ASSIGNMENTS

SOME SETS OF QUESTIONS IN THIS IW ARE DESIGNED TO BE ANSWERED BY ONE OR THE OTHER OF THE RESPONDENTS IN A HOUSEHOLD, BUT NOT BY BOTH, BASED ON WHO IS MOST KNOWLEDGEABLE ABOUT FINANCIAL OR FAMILY MATTERS. THUS, AT SOME POINTS THE FLOW OF THE QUESTIONNAIRE IS DETERMINED BY WHETHER A PARTICULAR RESPONDENT IS DESIGNATED AS ONE OF THE FOLLOWING 'FIN/FAM' TYPES AT VARIABLE X007 (RTab1X007 FOR FIRST Rs AND RTab2X007 FOR SECOND Rs):

- X007=1: FINANCIAL R
- X007=2: FAMILY R
- X007=3: FINANCIAL & FAMILY R
- X007=4: NON-FINANCIAL & NON-FAMILY R

X007 CODES 1 AND 2 ARE PAIRS, WHERE IF ONE RESPONDENT IS DESIGNATED THE FINANCIAL R, THE OTHER IN THE COUPLE MUST BE THE FAMILY R. SIMILARLY, CODES 3 AND 4 ARE PAIRS; ONE R CAN SERVE AS BOTH THE FINANCIAL AND FAMILY R, WHILE THE OTHER R WOULD SERVE AS NEITHER.

REINTERVIEW R_s RETAIN THEIR ASSIGNMENTS FROM THE LAST INTERVIEW. HOWEVER, IF A REINTERVIEW R HAS A NEW SPOUSE/PARTNER [AND SUCH A REINTERVIEW R WOULD THEN (NEARLY) ALWAYS BE DESIGNATED AS A FIRST R], THAT REINTERVIEW R IS NOW ASSIGNED TO BE THE FINANCIAL & FAMILY R (X007=3) REGARDLESS OF THE PREVIOUS STATUS. THE NEW SPOUSE/PARTNER IS ASSIGNED TO BE THE NON-FINANCIAL & NON-FAMILY R (X007=4).

ALL RESPONDENTS WHO ARE CATEGORIZED IN THIS IW AS BEING NOT COUPLED ({Preload_X065=6) OR WHO ARE EXIT R_s (CATEGORIZED AS BEING IN A SPLIT HH) ARE DESIGNATED AS FINANCIAL & FAMILY R (X007=3). IN THESE CASES THERE IS NOT A X007=4 COUNTERPART.

RESPONDENTS IN NEW INTERVIEW HH_s ARE ASSIGNED A FIN/FAM STATUS BASED ON THE RESPONSE FOR FIRST R_s AT A050. THE CRITERIA FOR THESE ASSIGNMENTS FOR FIRST R_s (A051) AND SECOND R_s (A052) IN NEW HOUSEHOLDS ARE THESE:

(1) IF CODE 1 or 3 or 5 WAS SELECTED AT A050, THEN:

FIRST R = FINANCIAL R

SECOND R = FAMILY R

(2) IF CODE 6 WAS SELECTED AT A050, THEN:

FIRST R = FINANCIAL & FAMILY R

SECOND R = NON-FINANCIAL & NON-FAMILY R

(3) IF CODE 7 WAS SELECTED AT A050, THEN:

FIRST R = NON-FINANCIAL & NON-FAMILY R

SECOND R = FINANCIAL & FAMILY R

(4) IF CODE 2 or 4 WAS SELECTED AT A050, THEN:

FIRST R = FAMILY R

SECOND R = FINANCIAL R

EXCEPT FOR NON-COUPLED AND EXIT RESPONDENTS, THE IWER HAS THE OPPORTUNITY TO CHANGE THE FIN/FAM ASSIGNMENTS IN THE QUESTION SERIES A053 - A055. AT THE BEGINNING OF THAT SERIES THE FIN/FAM STATUS FOR R_s IN REINTERVIEW HH_s IS STORED AT A051 FOR FIRST R_s AND A052 FOR SECOND R_s, JUST AS FOR NEW INTERVIEW R_s. IF THE IWER CHANGES THE FIN/FAM CATEGORIZATION FOR A FIRST R AT A055, THEN THE SECOND R IS ASSIGNED THE MATCHING CATEGORY IN THE PAIR TO A056 (UNSEEN). THOSE CATEGORIES ARE THEN ASSIGNED BACK TO RTab1X007 AND RTab2X007, RESPECTIVELY.

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

A053

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

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

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

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

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

[INSTR: YOU MAY CHANGE THIS ASSIGNMENT WITH PERMISSION FROM YOUR TEAM LEADER. IF YOU NEED TO CHANGE THIS ASSIGNMENT AND HAVE OBTAINED PERMISSION SELECT '1', OTHERWISE, SELECT '5' AND PROCEED WITH THIS INTERVIEW.

[INSTR: CHANGING THIS ASSIGNMENT WILL AFFECT LONGITUDINAL DATA SO PLEASE DO NOT DO SO WITHOUT PERMISSION.

OTHERWISE:

[INSTR: MAKE SURE R APPROVES OF ASSIGNMENT.]

1. CHANGE ASSIGNMENTS
5. LEAVE ASSIGNMENT AS STATED.....GO TO A065 BRANCHPOINT

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

A054

[INSTR: WHY ARE YOU CHANGING THIS ASSIGNMENT?]

OPEN _____

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

A055

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

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

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

End Financial-Family assignment

Additional nursing home questions (A065-A070)

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

A065

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

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

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

A066

MONTH

YEAR [YYYY]

DK [HIDE]

RF [HIDE]

A248 BRANCHPOINT: IF THIS IS AN EXIT IW, GO TO A067

A248_FacilityName

What is the name of this facility?

FACILITY NAME _____

A249_FacilityAddr1

What is the address of this facility?

[INSTR: PLEASE ENTER STREET ADDRESS BELOW.]

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

What is the address of this facility?

ADDRESS 1 _____

A250_FacilityAddr2

ADDRESS 2 _____ (Optional)

A067

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

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

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

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

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

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

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

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

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

CITY_____

DK [HIDE]

RF [HIDE]

A168_A068

STATE_____GO TO A070

97. OTHER COUNTRY [OS Text Box]

DK [HIDE].....GO TO A070

RF [HIDE].....GO TO A070

A069S

Country_____

DK [HIDE]

RF [HIDE]

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

ELSE: GO TO A070 BRANCHPOINT

A251_FacilityZip

ZIP _____

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

A070 BRANCHPOINT: IF THIS IS {THE SECOND R (SCVXR1_R2=2) and NOT A FINANCIAL R (A055 {NOT 1 and NOT 3})}, GO TO A071 BRANCHPOINT

A070

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

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

End additional nursing home questions

Housing location and residence questions (A071-A110)

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

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

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

A071

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

Next are some questions about your housing location.

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

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

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

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

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

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

OTHERWISE:

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

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

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

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

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

OTHERWISE:

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

- 1. YES
- 5. NO.....GO TO A072
- DK [HIDE].....GO TO A072
- RF [HIDE].....GO TO A072

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

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

A078

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

INSTR: If less than one year, enter '1'
 INSTR: Enter '95' if R says 'all my life'

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

INSTR: If less than one year, enter '1'

YEARS [Drop down]

- 1. One year or less
- 95. All my life
- DK [HIDE]
- RF [HIDE]

A072 BRANCHPOINT: GO TO A073 BRANCHPOINT

A072

IF R LIVES IN NURSING HOME (A028=1):
 Is your residence still in or around [HH's LAST IW 1ST RESIDENCE CITY, STATE]?

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

IF R LIVED IN NURSING HOME (A028=1):
 [Was your/(Was [his/her]/Was their)] residence still in or around HH's LAST IW 1ST RESIDENCE CITY, STATE?

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

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

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

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

A073

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

IF R IS IN NURSING HOME (A028=1):
Do you still have the same residence in HH's LAST IW 2ND RESIDENCE CITY, STATE?

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

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

IF R LIVED IN NURSING HOME (A028=1):
[Did you/(Did [he/she]/Did they)] still have the same residence in HH's LAST IW 2ND RESIDENCE CITY, STATE?

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

- 1. YES.....GO TO A075 BRANCHPOINT
- 5. NO
- DK [HIDE]
- RF [HIDE]

A074

IF R IS IN NURSING HOME (A028=1):
Do you still have a home in or around HH's LAST IW 2ND RESIDENCE CITY, STATE?

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

IF R LIVED IN NURSING HOME (A028=1):
[Did you/(Did [he/she]/Did they)] still have a home in or around HH's LAST IW 2ND RESIDENCE CITY, STATE?

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

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

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

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

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

A075

[INSTR: ASK IF NECESSARY:
(In what city and state is your residence currently located?)]

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]
In what city and state is your residence currently located?

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

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

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

CITY _____

- DK [HIDE]
- RF [HIDE]

A169_A076

STATE _____ [Drop down]

97. OTHER COUNTRY A077 _____

DK [HIDE]

RF [HIDE]

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

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

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

IF R HAD SECOND RESIDENCE IN HH'S LAST IW (Preload_X027=1) and DID NOT REPORT THAT BOTH CURRENT RESIDENCES ARE IN DIFFERENT AREAS FROM {1ST and 2ND} RESIDENCES IN HH'S LAST IW ({A072 and A074} NOT 5), GO TO A084 ASSIGNMENT

A079

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

Do you have any other house or apartment?

OTHERWISE:

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

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

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

Do you have any other house or apartment?

OTHERWISE:

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

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

IF R LIVED IN NURSING HOME (A028=1):
[Did you/(Did [he/she]/Did they)] have any other house or apartment?

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

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

- 1. YES
- 5. NO.....GO TO A084 ASSIGNMENT
- DK [HIDE].....GO TO A084 ASSIGNMENT
- RF [HIDE].....GO TO A084 ASSIGNMENT

A080

In what city and state is your other residence located?

[INSTR: ENTER 'OT' FOR OTHER COUNTRY.]
In what city and state is your other residence located?

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

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

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

CITY _____

DK [HIDE]
RF [HIDE]

A170_A081

STATE _____ [Drop down]

97. OTHER COUNTRY A082 _____
DK [HIDE]
RF [HIDE]

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

A083

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

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

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

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

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

NUMBER OF YEARS _____

95. ALL MY LIFE

DK [HIDE]

RF [HIDE]

A084

A084 ASSIGNMENT: NUMBER OF RESIDENCES:

IF R REPORTED THAT CURRENT RESIDENCES ARE {SAME and/or IN SAME AREA} AS {1ST and 2ND} RESIDENCES IN HH's LAST IW ({{A071 or A072} and {A073 or A074}}=1),
ASSIGN A084 = 2. TWO RESIDENCE

IF R SAID NOW HAS SECOND RESIDENCE (A079=1):
ASSIGN A084 = 2. TWO RESIDENCE

OTHERWISE:
ASSIGN A084 = 1. ONE RESIDENCE

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

A085

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

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

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

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

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

DEFINITION: Main residence is the one where R spent the most time (MTY)

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

A110

R HOUSING CONFIRM.

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

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

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

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

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

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

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

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

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

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

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

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

1. CONTINUE

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

A086/X025 & X026: CURRENT MAIN RESIDENCE (RE)ASSIGNMENT

CURRENT MAIN RESIDENCE CITY AND STATE ARE ASSIGNED TO A086 (CITY, STATE), AND (RE)ASSIGNED TO X025 (CITY) AND X026 (STATE):

BASED ON RESPONSES TO A085, IF R WAS ASKED A085

OTHERWISE:

BASED ON RESPONSES TO A COMBINATION OF PREVIOUS QUESTIONS IN THE HOUSING LOCATION SEQUENCE (A067-A081)

MAJOR FLOW CONTROL VARIABLE X033: X033_HHMoved

THE FLOW IN CERTAIN PARTS OF THE QUESTIONNAIRE, PARTICULARLY IN SECTIONS B (DEMOGRAPHICS: esp. B039 BRANCHPOINT) AND H (HOUSING) IS BASED UPON WHETHER THE HH CHANGED THE MAIN RESIDENCE, OR MOVED, SINCE THE HH'S LAST IW. X033 IS A BLAISE VARIABLE THAT SUMMARIZES RESPONSES TO A VARIETY OF PRECEDING QUESTIONS TO DETERMINE WHETHER THE HH'S MAIN RESIDENCE CHANGED AND WHETHER THAT INVOLVED REMAINING WITHIN THE SAME AREA OR MOVING OUT OF THE AREA.

X033_HHMoved (HH MOVED SINCE PREV WAVE)

1. R MOVED OUT OF AREA; 3. R CHANGED RESIDENCE*; 5. R DIDN'T MOVE

IF THE HH IS CLASSIFIED AS DIDN'T MOVE OR DIDN'T CHANGE MAIN RESIDENCE SINCE THE LAST HH IW (X033=5), THIS MEANS THAT THE PHYSICAL HOUSE THAT WAS REPORTED AS THE MAIN RESIDENCE IN THE LAST WAVE IS STILL THE MAIN RESIDENCE NOW. THUS, EVEN IF THE R REPORTED THAT S/HE HAS THE SAME HOMES AS IN THE LAST WAVE, IF THE RESIDENCE THAT WAS REPORTED AS THE SECOND RESIDENCE IN THE PREVIOUS WAVE IS CURRENTLY THE MAIN RESIDENCE, THE HH IS CONSIDERED TO HAVE MOVED OR CHANGED THE MAIN RESIDENCE (X033={1 or 3}).

* X033=3 MEANS CURRENT MAIN RESIDENCE CHANGED BUT IT IS IN THE SAME AREA AS THE PRIOR MAIN RESIDENCE

End housing location and residence questions

Begin Section A2 - children and household member updates

A087 BRANCHPOINT: IF THIS IS NOT A FIRST R and NOT A FAMILY R (X007 (NOT 2 and NOT 3)), GO TO A112

IF R IS NOT REPORTED TO LIVE IN NURSING HOME (A028 NOT 1) AND HAS PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner/spouse]].

To make sure we have a full and accurate list of all your children, We will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

IF R IS NOT REPORTED TO LIVE IN NURSING HOME (A028 NOT 1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner/spouse].

First, if you [or your [husband/wife/partner/spouse]] have children, we will ask you to list their names, sex and relationship to you [and to your [husband/wife/partner/spouse]]. We will then ask a few questions about each child's living arrangements.

IF R LIVES IN NURSING HOME (A028=1) AND HAS PRELOADED CHILDREN :

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner]].

To make sure we have a full and accurate list of all your children, we will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

If we've missed a child or you have new children, we'll ask you to add them.

OTHERWISE, IF R LIVES IN NURSING HOME (A028=1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner]].

IF R IS NOT REPORTED TO LIVE IN NURSING HOME (A028 NOT 1) AND HAS PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner/spouse]].

To make sure we have a full and accurate list of all your children, We will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

If we've missed a child or you have new children, we'll ask you to add them.

IF R IS NOT REPORTED TO LIVE IN NURSING HOME (A028 NOT 1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner/spouse].

First, if you [or your [husband/wife/partner/spouse]] have children, we will ask you to list their names, sex and relationship to you [and to your [husband/wife/partner/spouse]]. We will then ask a few questions about each child's living arrangements.

OTHERWISE, IF R LIVES IN NURSING HOME (A028=1) AND HAS PRELOADED CHILDREN :

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner]].

To make sure we have a full and accurate list of all your children, we will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

If we've missed a child or you have new children, we'll ask you to add them.

OTHERWISE, IF R LIVES IN NURSING HOME (A028=1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] your children [and those of your [husband/wife/partner]].

IF R WAS NOT REPORTED TO HAVE LIVED IN NURSING HOME (A028 NOT 1) AND HAS PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] [RName]'s [children/ and your children/children and those of [his/her] [husband/wife/partner/spouse]]

To make sure we have a full and accurate list of all [RNAME]'s children, we will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

If we've missed a child, we'll ask you to add them.

IF R IS NOT REPORTED TO LIVE IN NURSING HOME (A028 NOT 1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] [RName]'s [children/ and your children/children and those of [his/her] [husband/wife/partner/spouse]]

First, if [RName] [or you/ or [his/her] [husband/wife/partner/spouse]] had children, we will ask you to list their names, sex and relationship to [RNAME] [and to [you/[his/her] [husband/wife/partner/spouse]]. We will then ask a few questions about each child's living arrangements.

IF R LIVED IN NURSING HOME (A028=1) AND HAS PRELOADED CHILDREN :

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] [RName]'s [children/ and your children/children and those of [his/her] [husband/wife/partner/spouse]]

To make sure we have a full and accurate list of all [RNAME]'s children, we will go through each child from our records and ask you to confirm or correct key information about them. We will be referring to these children by their first name so that we can be sure we are talking about the correct person.

OTHERWISE, IF R LIVED IN NURSING HOME (A028=1) AND DOES NOT HAVE PRELOADED CHILDREN:

Relatives can have important effects on your life, especially if someone in your family needs help. For this reason we would like to [verify our data on/ask some questions about] [RName]'s [children/ and your children/children and those of [his/her] [husband/wife/partner/spouse]]

1. CONTINUE

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

1. CONTINUE.....GO TO A208 (Child) BRANCHPOINT

CHILD ROSTER BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO A112 (ASSIST)

FIRST NAME (X058)
RELAT TO R (X061)
RELAT TO R'S SPP (X063)
SEX (X060)
RES (X056)
MOVED OR DIED MO (X072)
MOVED OR DIED YR (X073)
A186_X075 DUP OF (X075)
SAME SPP (X095)
WHAT HAPPENED (X076)
X096 MAR (X065)
X097 PART (X065)
NEW SPP FIRST NAME (A958)
NEW SPP SEX (A960)
NEW SPP RES (A956)
COMMENT (X081)

NOTE: THE REFERENCE IN PARENTHESES AFTER THE DESCRIPTIVE PORTION OF THE COLUMN HEADING {E.G., '(X065)' FOR 'MARRIED'} IS THE VARIABLE WHERE THE INFORMATION {E.G., COUPLENESS STATUS} IS STORED. ANY REFERENCE ABOVE THE DESCRIPTION IS THE FIELD NAME FOR THE QUESTION THAT ASKS FOR THAT INFORMATION ('X083'). WHERE THERE IS NO REFERENCE BEFORE THE DESCRIPTION (E.G., 'FIRST NAME') THE VARIABLE NAME AND FIELD NAME ARE THE SAME (X058).

NOTE: THE ROSTER DISPLAYS TO THE IWER ALL PRELOADED CHILDREN AND THEIR SPOUSES/PARTNERS REPORTED FOR R AND HIS/HER SPOUSE(S)/PARTNER(S) IN PRIOR IW(S). THE ROSTER SHOWN ABOVE PRESENTS AN AMALGAMATION OF ALL CATEGORIES DISPLAYED FOR THE PRELOADED AND/OR NEW CHILDREN. CATEGORIES FOR PRELOADED CHILDREN THAT ARE NOT SHOWN FOR NEW CHILDREN ARE THESE: 'SAME SPP (X095)' AND 'WHAT HAPPENED (X076)'.

CATEGORIES FOR PRELOADED CHILDREN ARE ALREADY FILLED. THE IWER UPDATES AND ADDS INFORMATION ABOUT CHILDREN, AS NECESSARY, BY SELECTING A CODED RESPONSE FROM A MENU THAT APPEARS FOR EACH CATEGORY COLUMN. THE IWER ALSO ADDS NAMES OF NEW SPOUSES/PARTNERS OF PRELOADED CHILDREN.

AFTER THE IWER HAS COMPLETED ASKING ABOUT ALL PRELOADED CHILDREN (IF ANY) AND THEIR PRELOADED OR NEW SPOUSES/PARTNERS {X058 THROUGH X081 (CHILD)}, S/HE ASKS IF THERE ARE ANY OTHER CHILDREN THAT WERE NOT ON THE CHILD ROSTER (A208). IF THE RESPONDENT SAYS THERE ARE, THEN {X058 THROUGH X081 (CHILD)} ARE ASKED ABOUT **NEW** CHILDREN AND THEIR SPOUSES/PARTNERS, IF ANY.

IF WE LEARN THAT A PRELOADED CHILD HAS A NEW SPOUSE/PARTNER OR THAT A NEW CHILD IS MARRIED/PARTNERED (X065), AN OPEN FIELD (A958) FOR THE NEW SPOUSE/PARTNER IS ENTERED BESIDE THE CHILD'S.

DATA FOR CERTAIN FIELDS ARE ENTERED AUTOMATICALLY DEPENDING ON THE R'S RESPONSES TO OTHER QUESTIONS. THIS IS PARTICULARLY TRUE FOR A PRELOADED CHILD'S SPOUSE/PARTNER. WHEN ALL QUESTIONS HAVE BEEN ASKED ABOUT THE CHILD, AND THE IWER MOVES TO OR ENTERS THE NAME OF THE PRELOADED CHILD-IN-LAW, SOME INFORMATION FOR THE LATTER APPEARS AUTOMATICALLY OPPOSITE SEX, AS WELL AS OPPOSITE IN-LAW RELATIONSHIP FOR NEW CHILDREN.

IN THE CASE OF SAME-SEXED COUPLES, THE GENDER OF THE CHILD-IN-LAW, WHILE ASSIGNED AS THE OPPOSITE OF THE CHILD'S, MAY BE CHANGED BY THE IWER TO THE SAME SEX AS THE CHILD'S. THE RELATIONSHIP REMAINS AS ASSIGNED, BUT, WHILE THE RELATIONSHIP DISPLAYED TO THE IWER IS SHOWN GENDERIZED (E.G., '5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)'), THE BACKGROUND CATEGORY IS NOT (E.G., '5. SPOUSE/PARTNER OF DAUGHTER').

HOWEVER, MOST AUTOMATIC ENTRIES CAN BE EDITED BY THE IWER. FOR EXAMPLE, THE GENDER FOR THE SPOUSE/PARTNER IS AUTOMATICALLY ENTERED AT X060 AS THE OPPOSITE OF THE CHILD'S AND THE RESIDENCY STATUS IS SHOWN AS THE SAME AS THE CHILD'S, BUT THE IWER COULD CHANGE THESE ONCE S/HE IS DEALING WITH THE CHILD-IN-LAW.

NOTE: THE FILL, "CHILDn FIRST NAME", IN THE QUESTIONS REFERS TO THE CHILD IN QUESTION (WHETHER THAT IS THE CHILD OF THE R OR OF R'S SPOUSE/PARTNER), OR TO THE SPOUSE/PARTNER OF THE CHILD (I.E., CHILD-IN-LAW).

A208 (CHILD) BRANCHPOINT: IF THERE ARE PRELOADED CHILDREN, GO TO A221 BRANCHPOINT

A208A

IF REINTERVIEW HH (X024=1) AND NO CHILDREN WERE PRELOADED FOR THE HOUSEHOLD:
No children were previously reported to us.

ASK ALL:

Do you [or your [husband/wife/partner]] have any [other] living children or step-children?

[INSTR: DO NOT INCLUDE CHILDREN-IN-LAW.]

IF SECOND R AND AT LEAST ONE CHILD REPORTED:

[IWER: PLEASE CONFIRM THIS INFORMATION IN THE CHILD GRID THAT WAS PROVIDED OR
UPDATED BY THE 1st R

IF REINTERVIEW HH (X024=1) AND NO CHILDREN WERE PRELOADED FOR THE HOUSEHOLD:
No children were previously reported to us.

ASK ALL:

Do you [or your [husband/wife/partner]] have any [other] living children or step-children?

[INSTR: DO NOT INCLUDE CHILDREN-IN-LAW.]

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

Did [R's FIRST NAME] or do you have any [other] living children or step-children?

IF PROXY REPORTER IS NOT SPOUSE/PARTNER (A009 NOT 2):

Did [R's FIRST NAME] [or [his/her] [husband/wife/partner]] have any [other] children or step-children?

[INSTR: DO NOT INCLUDE CHILDREN-IN-LAW.]

1. YES

5. NO.....GO TO A224_CHILDSUMMARY BRANCHPOINT

DK [HIDE].....GO TO A224_CHILDSUMMARY BRANCHPOINT

RF [HIDE].....GO TO A224_CHILDSUMMARY BRANCHPOINT

1. YES

5. NO.....GO TO A224_CHILDSUMMARY

DK [HIDE].....GO TO A224_CHILDSUMMARY

RF [HIDE].....GO TO A224_CHILDSUMMARY

Preloaded children loop grid (X058-A108)

CAWI NOTE: CHILDREN LOOP GRID BEGINS (A221-A956)

*****NOTE: BEGINNING OF X058 (CHILD) LOOP [PART 1]: QUESTIONS A221 THROUGH A246 ARE ASKED FOR EACH CHILD WHO WAS PRELOADED FROM THE PREVIOUS HOUSEHOLD INTERVIEW OR WHO WAS RECORDED IN THE SCREENER. THE OBJECTIVE IS TO VERIFY OR CORRECT INFORMATION THAT RARELY CHANGE FOR EAC CHILD. WHEN ALL PRELOADED CHILDREN ARE ACCOUNTED FOR, R IS ASKED IF THEY HAVE ANY OTHER CHILDREN (A208), AND WILL BE ASKED A221 THROUGH A246 IF MORE CHILDREN ARE REPORTED. ONCE ALL CHILDREN ARE ACCOUNTED FOR THE R WILL GET A224_CHILDSUMMARY. THE CHILD SUMMARY IS THE R'S LAST CHANCE TO CONFIRM/UPDATED INFORMATION FROM PART 1. AFTER A224_CHILDSUMMARY, THE GATE WILL CLOSE AND Rs WILL NOT BE ABLE TO ADD/EDIT THE LIST OF CHILDREN.*****

A221 (CHILD) BRANCHPOINT: IF THIS IS A NEWLY ADDED CHILD OR CAPI, GO TO X058

IF RELATIONSHIP TO R IS CHILD (X061=3,4,6, OR 7) AND RELATIONSHIP TO R'S SPOUSE/PARTNER IS NOT CHILD, ASSIGN 5. NO, THIS INFORMATION NEEDS UPDATING AND GO TO X058.

A221

[Let's start with/ Let's talk about] [Child's Name]. Is all the information we have listed below correct?

First name:	[Child's name-X058]
Relationship to you:	[Child's relationship to R-X061]
Relationship to your [hwps]:	[Child's relationship to R's spouse/partner-X063]
Sex:	[Child's sex-x060]
Alive or deceased:	[Child's living status-x056]

1. YES, THIS INFORMATION IS ACCURATE.GO TO END OF X058 (CHILD) LOOP PART ONE
 5. NO, THIS INFORMATION NEEDS UPDATINGGO TO X058 (CHILD)
- DK [HIDE]
RF [HIDE]

X058 (CHILD) BRANCHPOINT: IF THIS IS NOT A CHILD {I.E., IF THIS IS A CHILD-IN-LAW, THE SPOUSE/PARTNER OF THE PREVIOUS CHILD}{X061 = {NOT 3 and NOT 4 and NOT 6 and NOT 7 and NOT 90}} and THIS IS A PRELOADED CHILD-IN-LAW and NAME OF CHILD-IN-LAW DOES NOT NEED TO BE CORRECTED {(X095 NOT 2) FOR PREVIOUS CHILD}, GO TO X056 (CHILD) BRANCHPOINT (AFTER X060)

X058A

(CHILD)

[INSTR: Ask, record, probe as necessary.]

IF THIS IS A CHILD (CLASSIFIED AS SON, STEPSON, DAUGHTER, STEPDAUGHTER, Other type of child) (X061 = {3 or 4 or 6 or 7 or 90}):

IF THIS IS THE FIRST PRELOADED CHILD IN THE GRID:

(First,) I'd like to start with your children [and those of your [husband/wife/partner]].

[INSTR: This is a preloaded child from the prior wave. Please verify the spelling of the child's first name and update other information, if appropriate.]

NOTE: FOR A PRELOADED CHILD THE NAME IS DISPLAYED AND IS EDITABLE BY THE IWER.

IF THIS IS A NEW CHILD:

What is the name of the (first/next) child?

[INSTR: ENTER FIRST NAME OF CHILD]

IF THIS IS A PRELOADED CHILD:

Please make revisions below, as necessary. When you are finished, select "Next" to continue.

IF THIS IS A NEWLY ADDED CHILD:

Please add information below for this child.

(CHILD)

[INSTR: Ask, record, probe as necessary.]

IF THIS IS A CHILD (CLASSIFIED AS SON, STEPSON, DAUGHTER, STEPDAUGHTER, Other type of child) (X061 = {3 or 4 or 6 or 7 or 90}):

IF THIS IS THE FIRST PRELOADED CHILD IN THE GRID:

(First,) I'd like to start with R's FIRST NAME's [children/and your children/and those of your [his/her] [husband/wife/partner]'s children].

[INSTR: This is a preloaded child from the prior wave. Please verify the spelling of the child's first name and update other information, if appropriate.]

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

NOTE: FOR A PRELOADED CHILD THE NAME IS DISPLAYED AND IS EDITABLE BY THE IWER.

IF THIS IS A NEW CHILD:

What is the name of the (first/next) child?

[INSTR: ENTER FIRST NAME OF CHILD]

IF THIS IS A NEW CHILD:

NAME _____

RF [HIDE].....GO TO A208

OTHERWISE:

NAME _____

FIRST NAME _____

NOTE:

If the R doesn't give child name, then we'll skip the rest of the child grid and we will not ask any more questions about this child.

X061A

[INSTR: Ask, record, probe as necessary.]
(What is CHILdN FIRST NAME's relationship to you?)

[INSTR: For HRS, approved child relationships include: Son, Step-son (Partner's son), Daughter, Step-daughter (Partner's daughter), Former Step-child or Other type of child.]

Use "R doesn't know this person" only when R has never heard of this person, not for situations where R knows the person but doesn't have a close relationship with them. This person will then be deleted from the child list.

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

Relationship to you (Dropdown)

[INSTR: ASK OR RECORD]

(What was [CHILdN FIRST NAME]'s relationship to [R's FIRST NAME]?)

[INSTR: For HRS, approved child relationships include: Son, Step-son (Partner's son), Daughter, Step-daughter (Partner's daughter), Former Step-child or Other type of child.]

Use "R doesn't know this person" only when R has never heard of this person, not for situations where R knows the person but doesn't have a close relationship with them. This person will then be deleted from the child list.

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

RELATIONSHIP TO R

Relationship codes to display for newly added children:

- 3.SON
- 4. STEPSON OR SPOUSE/PARTNER'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR SPOUSE/PARTNER'S DAUGHTER
- 90. OTHER TYPE OF CHILD

Relationship codes to display for preloaded children:

- 3. SON
- 4. STEPSON OR SPOUSE/PARTNER'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR SPOUSE/PARTNER'S DAUGHTER
- 30. FORMER STEP-CHILD
- 90. OTHER TYPE OF CHILD
- 20. OTHER INDIVIDUAL
- 32. [I DON'T/ R DOESN'T] KNOW THIS PERSON

RELATIONSHIP TO YOU (DROPDOWN)

Relationship codes to display for newly added children:

- 3.SON
- 4. STEPSON OR SPOUSE/PARTNER'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR SPOUSE/PARTNER'S DAUGHTER
- 90. OTHER TYPE OF CHILD

Relationship codes to display for preloaded children:

- 3. SON
- 4. STEPSON OR SPOUSE/PARTNER'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR SPOUSE/PARTNER'S DAUGHTER
- 30. FORMER STEP-CHILD
- 90. OTHER TYPE OF CHILD
- 20. OTHER INDIVIDUAL
- 32. [I DON'T/ R DOESN'T] KNOW THIS PERSON

NOTE:

1. *If this is a child-in-law, the relationship of '5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)' or '8. SPOUSE/PARTNER OF SON (DAUGHTER-IN-LAW)' (or, infrequently, '91. AMBIGUOUS CHILD-IN-LAW RELATIONSHIP') was retained (for a preloaded child-in-law) when R reported that the child is currently married/partnered (X095={1 or 2 or 3 or 4} or ({ X096 or X097}=1)). The interviewer does not see this question for a preloaded child-in-law and may not change the assigned relationship on the roster*
2. *The ex-/late spouse/partner was assigned a relationship of 'X061=31. FORMER CHILD-IN-LAW' when R reported that a previous child-in-law was no longer the child's spouse/partner (X095=5) or had died (X056=4).*
3. *DON'T KNOW/DK and REFUSE/RF are not acceptable responses.*

X063 (CHILD) BRANCHPOINT: IF R DOES NOT HAVE A {SPOUSE or PARTNER} (X065 {NOT 1 and NOT 3}), GO TO X060 (CHILD)

X063A

[INSTR: Ask, record, probe as necessary.]

What is the relationship of CHILdN's FIRST NAME to your (current) [husband/wife/partner]?

[INSTR: For HRS, approved child relationships include: Son, Step-son (Partner's son), Daughter, Step-daughter (Partner's daughter), Former Step-child or Other type of child.]

Use "R doesn't know this person" only when R has never heard of this person, not for situations where R knows the person but doesn't have a close relationship with them. This person will then be deleted from the child list.

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

Relationship to your [husband, wife, partner, spouse]

[INSTR: Ask, record, probe as necessary.]

What (was/is) the relationship of [CHILdN's FIRST NAME] to [you/[R's FIRST NAME]'s [husband/wife/partner]]?

[INSTR: For HRS, approved child relationships include: Son, Step-son (Partner's son), Daughter, Step-daughter (Partner's daughter), Former Step-child or Other type of child.]

Use "R doesn't know this person" only when R has never heard of this person, not for situations where R knows the person but doesn't have a close relationship with them. This person will then be deleted from the child list.

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

CHILD GRID - RELATIONSHIP TO R's SPOUSE/PARTNER

Relationship codes to display for newly added children:

- 3. SON
- 4. STEPSON OR [SPOUSE/PARTNER]'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR [SPOUSE/PARTNER]'S DAUGHTER
- 90. OTHER TYPE OF CHILD

Relationship codes to display for preloaded children:

- 3. SON
- 4. STEPSON OR [SPOUSE/PARTNER]'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR [SPOUSE/PARTNER]'S DAUGHTER
- 30. FORMER STEP-CHILD
- 90. OTHER TYPE OF CHILD
- 97. OTHER INDIVIDUAL
- 32. [I DON'T/ R DOESN'T] KNOW THIS PERSON

RELATIONSHIP TO YOUR [HWPS] (DROPDOWN)

Relationship codes to display for newly added children:

- 3. SON
- 4. STEPSON OR [SPOUSE/PARTNER]'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR [SPOUSE/PARTNER]'S DAUGHTER
- 90. OTHER TYPE OF CHILD

Relationship codes to display for preloaded children:

- 3. SON
- 4. STEPSON OR [SPOUSE/PARTNER]'S SON
- 6. DAUGHTER
- 7. STEPDAUGHTER OR [SPOUSE/PARTNER]'S DAUGHTER
- 30. FORMER STEP-CHILD
- 90. OTHER TYPE OF CHILD
- 97. OTHER INDIVIDUAL
- 32. [I DON'T/ R DOESN'T] KNOW THIS PERSON

X060A

[INSTR: Ask, record, probe as necessary.]

(What is [CHILDn FIRST NAME]'s sex?)

Sex (Dropdown)

[INSTR: Ask, record, probe as necessary.]

(What is [CHILDn FIRST NAME]'s sex?)

1. MALE
2. FEMALE

NOTE: The gender for the child's spouse/partner has already been assigned as the opposite of the child's.

SEX (DROPDOWN)

1. MALE
2. FEMALE

A225 (CHILD) BRANCHPOINT: IF THIS A NEWLY ADDED CHILD, GO TO END OF X08(CHILD) LOOP
ELSE. ASK.

A225

[INSTR: Ask, record, probe as necessary.]

(Is [Child FNAME] still alive?)
Alive or deceased (Dropdown)

1. ALIVE
4. DECEASED

A246 (CHILD) BRANCHPOINT: IF THIS A CAWI IW, GO TO END OF X08(CHILD) LOOP
ELSE. ASK.

A246

[INSTR: Ask, record, probe as necessary.]

[INSTR: IS [CHILD FNAME] A DUPLICATE?]

1. YES
5. NO

X081

[INSTR: Ask, record, probe as necessary.]

[INSTR: ENTER ANY COMMENTS HERE]

COMMENTS:

NOTE: END OF X058 (CHILD) LOOP PART ONE: IF THERE IS ANOTHER PRELOADED CHILD ON THE CHILD ROSTER, QUESTIONS X058 THROUGH A225 (CHILD) ARE ASKED, AS NECESSARY, ABOUT THE NEXT CHILD ON THE ROSTER. WHEN ALL PRELOADED CHILDREN ARE ACCOUNTED FOR, R WILL BE ASKED IF THEY HAVE ANY OTHER CHILDREN (A208), AND WILL BE ASKED X058 THROUGH A225 IF MORE CHILDREN ARE REPORTED. IF ALL CHILDREN ARE ACCOUNTED FOR PLEASE CONTINUE TO A224_CHILD SUMMARY.

A224

IF NO PRELOADED CHILDREN AND NO NEWLY ADDED CHILDREN:

[INSTR: R HAS NO LIVING CHILDREN]

[INSTR: IF THIS IS CORRECT, SELECT '1' TO CONTINUE OTHERWISE CLICK ON ADD A CHILD]

[INSTR: ONCE YOU SELECT '1' TO CONTINUE ON THIS SCREEN YOU WILL NO LONGER BE ABLE TO ADD TO OR EDIT THIS LIST.]

OTHERWISE:

[INSTR: CONFIRM THIS INFORMATION WITH THE RESPONDENT BEFORE PROCEEDING TO THE NEXT SCREEN.]

[INSTR: IF ANY OF THIS INFORMATION IS INCORRECT, PLEASE CLICK ON THE NAME ON THE RIGHT TO GO BACK AND CHANGE IT. IF ANY CHILD IS MISSING CLICK 'ADD A CHILD'. IF THE INFORMATION IS CORRECT, SELECT '1' TO CONTINUE.]

[CHILD SUMMARY TABLE : CHILD'S NAME, RELATION TO R, RELATION TO R's [H,W,PS,S], SEX, ALIVE OR DECEASED]

[INSTR: THIS IS A "GATE" QUESTION. ENTERING '1' ON THIS SCREEN WILL LOCK YOU OUT OF MAKING CHANGES. ONCE YOU KNOW FOR CERTAIN THAT NO CHANGES ARE NEEDED, SELECT '1' THEN [ENTER] TO CONTINUE.]

IF NO PRELOADED CHILDREN OR NO NEWLY ADDED CHILDREN:

Just to confirm, you have indicated that you do not have any living children. If this is incorrect, please click on the "Add a child" button on the right.

Once you press the "Next" button on this screen you will no longer be able to add to or edit this list.

OTHERWISE:

The table below is a summary of the information that you just entered or confirmed. Please review this information.

[INSTR: IF YOU SEE DUPLICATE NAMES ON THIS LIST, PLEASE DESCRIBE THE PROBLEM USING THE COMMENT BUTTON.]

Child's Name	Relation To you	Relation to your [HWP]	Sex	Alive or Deceased

·If the information above is correct select 'Next' to continue.

·If any of the information is incorrect, please click on the name in the list on the right to go back and change it.

·If any child is missing click 'Add a child'.

Once you press the "Next" button on this screen you will no longer be able to add to or edit this list.

A087 DUMMY: IF R ATTEMPTS TO GO BACK TO THE CHILD ROSTER, CONTINUE.
ELSE: GO TO A226 BRANCHPOINT

A087_dummy

Child's Name	Relation To you	Relation to your [HWP]	Sex	Alive or Deceased

You can no longer add to or edit the list of children. The above information has been set for this interview.

If there something important you would like us to know, please use the F2 comment to provide the information.

[INSTR: SELECT "1" TO CONTINUE.]

NOTE: IF THE RELATIONSHIP TO R IS A CHILD TYPE (X061=3,4,6,7) AND THE RELATIONSHIP TO R'S SPOUSE/PARTNER IS NOT A CHILD TYPE (X063 NOT 3,4,6,7) WE WILL ASSIGN X063=90. OTHER TYPE OF CHILD AFTER THE SUMMARY SCREEN.

NOTE: *BEGINNING OF X058 (CHILD) LOOP PART TWO: QUESTIONS A226 THROUGH A956 ARE ASKED FOR EACH CHILD AND SPOUSE/PARTNER WHO WAS PRELOADED FROM THE PREVIOUS HOUSEHOLD INTERVIEW OR WHO WAS RECORDED IN THE SCREENER OR WHO WERE NEWLY ADDED IN PART ONE. THE OBJECTIVE IS TO VERIFY OR CORRECT ALL INFORMATION FOR EACH CHILD, AND ADDING NEW SPOUSE/PARTNERS.*****

A226 BRANCHPOINT: IF R LIVES/LIVED IN A NURSING HOME (A028=1) AND (R IS SINGLE (A038=6), ASSIGN 5 TO A226 AND GO TO X072 BRANCHPOINT.

IF R [LIVES/LIVED IN A NURSING HOME (A028=1] AND LIVES/LIVED WITH SPOUSE/PARTNER (A030=1 or A209=1), ASSIGN 5 TO A226 AND GO TO X072 BRANCHPOINT.

IF R DOESN'T KNOW THIS PERSON (x061=32), THEN ASSIGN X056=7 FOR BOTH THIS PERSON AND THEIR SPOUSE/PARTNER, AND GO TO THE END OF THE X058 (CHILD) LOOP PART TWO.

A226

IF R LIVES/LIVED IN NURSING HOME (A028=1):
(Does CHILdN FIRST NAME live with your [husband/wife/partner]?)

OTHERWISE:

First time Intro:

We have a few more questions about each of your children in turn, starting with [child's name]

IF THIS IS A CHILD IN LAW:

Now we have some questions about [Child FName]'s [HWPS], [SPP OF CHILD NAME]

Subsequent Intro:

(Now we have some questions about your [child's relationship to R] [Child's name].)

Ask ALL:

Does [Child's name] [still] live with you?

IF CHILD WAS PRELOADED AS DEAD (preloaded X056=4):

[INSTR: IF NECESSARY CONFIRM THAT CHILdN FIRST NAME DIED]

[INSTR: IF R HAS MENTIONED THEY HAVE NO CONTACT WITH CHILDREN OR STEP-CHILDREN AT ANY TIME IN THE CHILD SERIES, PLEASE PROBE AND SELECT CODE 6. HAVE NO CONTACT] IF APPROPRIATE.]

First time Intro:

We have a few more questions about each of your children in turn, starting with [child's name]

IF THIS IS A CHILD IN LAW:

Now we have some questions about [Child FName]'s [HWPS], [SPP OF CHILD NAME]

Subsequent Intro:

Now we have some questions about your [child's relationship to R] [Child's name].

Ask ALL:

Does [Child's name] [still] live with you?

First time Intro:

We have a few more questions about each of [R's FIRST NAME's/your] children in turn, starting with [child's name]

IF THIS IS A CHILD IN LAW:

Now we have some questions about [Child FName]'s [HWPS], [SPP OF CHILD NAME]

Subsequent Intro:

(Now we have some questions about [R's FIRST NAME's] [child's relationship to R] [Child's name].)

Ask ALL:

Did [Child's name] live with [him/her]?

SHOW FOR ALL EXIT IWS:

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

[INSTR: IF R HAS MENTIONED THEY HAVE NO CONTACT WITH CHILDREN OR STEP-CHILDREN AT ANY TIME IN THE CHILD SERIES, PLEASE PROBE AND SELECT CODE 6. HAVE NO CONTACT] IF APPROPRIATE.]

1. YESGO TO X072 BRANCHPOINT
2. YES, BUT [HE/SHE] IS TEMPORARILY AWAY AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS (E.G., IN SCHOOL, TRAVELLING)GO TO X072 BRANCHPOINT
5. NOGO TO X072 BRANCHPOINT
6. NO, [I HAVE/R HAS] NO CONTACT WITH THIS PERSONGO TO X072 BRANCHPOINT
- DK [HIDE]GO TO X072 BRANCHPOINT
- RF [HIDE]GO TO X072 BRANCHPOINT

X056 (CHILD) BRANCHPOINT: IF R {LIVES/LIVED IN A NURSING HOME (A028=1) and THIS IS AN EXIT INTERVIEW and {R IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} ARE BOTH LIVING IN A NURSING HOME (A030=1 or A028 and A033=1)}, ASSIGN 5 TO X056 AND GO TO X072(CHILD) BRANCHPOINT

X056A

(CHILD)

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

(Does CHILDn FIRST NAME live with your [husband/wife/partner]?)

IF R IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} ARE BOTH LIVING IN A NURSING HOME (A030=1 or A028 and A033=1):

[INSTR: Since this R is in a nursing home, select code 5-Non-Resident unless R mentions that child has died.]

[INSTR: If necessary probe: Is CHILDn FIRST NAME still living?]

OTHERWISE:

(Does CHILDn FIRST NAME live with you?)

IF CHILD WAS PRELOADED AS DEAD (preloaded X056=4):

[INSTR: IF NECESSARY CONFIRM THAT CHILDn FIRST NAME DIED]

[INSTR: IF R HAS NO CONTACT WITH A CHILD OR STEP-CHILD, PLEASE SELECT CODE 6. HAVE NO CONTACT]

(CHILD)

(Did [CHILDn FIRST NAME] live with [him/her][R's FIRST NAME /you]?)

SHOW FOR ALL EXIT IWS:

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

IF CHILD WAS PRELOADED AS DEAD (preloaded X056=4):

[INSTR: IF NECESSARY CONFIRM THAT CHILDn FIRST NAME DIED]

1. RESIDENT
 2. AWAY/INST: THE PERSON IS TEMPORARILY AWAY (IN SCHOOL, JAIL, REHAB, ETC.) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 3. AWAY/OTHER: THE PERSON IS TEMPORARILY AWAY (FOR ANOTHER REASON, SUCH AS TRAVELLING) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 4. DIED
 5. NONRESIDENT
 6. HAVE NO CONTACT
 7. DELETE.....GO TO X081
 8. DUPLICATE.....GO TO A186_X075/X075
- DK [HIDE]
RF [HIDE]

NOTE: The residency status for the child's spouse/partner has already been assigned as the same as the child's. However, the interviewer can see the question for a child-in-law and may change it on the roster if necessary.

X072 BRANCHPOINT: IF THIS IS NOT A REINTERVIEW HOUSEHOLD (X024 NOT 1), GO TO X095 (CHILD) BRANCHPOINT

IF R DID NOT REPORT IN THIS IW THAT A CHILD DIED or MOVED {INTO or OUT OF} HH RESIDENCE (X056), GO TO X095 BRANCHPOINT

X072A

IF CHILDN DIED ({X056=4} and AT HH's LAST IW {CHILDN WAS LIVING ({Preload_X056} NOT 4}}):
In what month and year did CHILDN's FIRST NAME die?

IF CHILDN MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {CHILDN WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY}}):
In what month and year did [you/your [husband/wife/partner]] and CHILDN's FIRST NAME start living together?

IF CHILDN MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW CHILDN WAS RESIDENT ({Preload_X056}=1):
In what month and year did [you/your [husband/wife/partner]] and CHILDN's FIRST NAME stop living together?

IF CHILDN DIED ({X056=4} and AT HH's LAST IW {CHILDN WAS LIVING ({Preload_X056} NOT 4}}):

In what month and year did [CHILDN's FIRST NAME] die?

IF CHILDN MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {CHILDN WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY}}):

In what month and year did [you/your [husband/wife/partner]] and [CHILDN's FIRST NAME] start living together?

IF CHILDN MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW CHILDN WAS RESIDENT ({Preload_X056}=1):

In what month and year did [you/your [husband/wife/partner]] and [CHILDN's FIRST NAME] stop living together?

IF CHILDN DIED ({X056=4} and AT HH's LAST IW {CHILDN WAS LIVING ({Preload_X056} NOT 4}}):

In what month and year did [CHILDN's FIRST NAME] die?

IF CHILDN MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {CHILDN WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY}}):

In what month and year did [R's FIRST NAME] and [CHILDN's FIRST NAME] start living together?

IF CHILDN MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW CHILDN WAS RESIDENT ({Preload_X056}=1):

In what month and year did [R's FIRST NAME] and [CHILDN's FIRST NAME] stop living together?

MONTH:

- 1. JAN
- 2. FEB
- 3. MAR
- 4. APR
- 5. MAY
- 6. JUN
- 7. JUL
- 8. AUG
- 9. SEP
- 10. OCT
- 11. NOV
- 12. DEC
- DK [HIDE]
- RF [HIDE]

X073A

YEAR _____

- DK
- RF

A186/A186_X075 BRANCHPOINT: GO TO X095 BRANCHPOINT

A186A_X075

[INSTR: CHOOSE THE PERSON THIS IS A DUPLICATE OF]

[INSTR: CHOOSE THE PERSON THIS IS A DUPLICATE OF]

NAME(S) OF ALL OTHER CHILDREN(-IN-LAW)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD(-IN-LAW) NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]

51. NOT ON LIST

- DK
- RF

NOTE: Interviewer selects person from list of all children(-in-law) except for the child in question.

X095 (CHILD) BRANCHPOINT: IF THIS IS NOT A CHILD {I.E., IF THIS IS A CHILD-IN-LAW} (X061 = {NOT 3 and NOT 4 and NOT 6 and NOT 7 and NOT 90}), GO TO END OF CHILD LOOP (CHILD)

IF THIS CHILD IS A DUPLICATE or DIED (X056={4 or 8}), GO TO END OF CHILD LOOP

IF CHILD WAS ADDED THIS INTERVIEW (X055=EMPTY), GO TO X096 (CHILD)

IF CHILD WAS SINGLE AT HH's LAST IW ({Preload_X065=6), GO TO X096 (CHILD)

X095A

(Is CHILDn's SPOUSE/PARTNER FIRST NAME still [CHILD FNAME]'s [spouse/partner]?)

[INSTR: VERIFY SPOUSE NAME'S SPELLING, IF NECESSARY]

[INSTR: "IF [CHILD'S SPOUSE FNAME] IS DECEASED, ENTER '5"]

Is [CHILDn's SPOUSE/PARTNER FIRST NAME] still [CHILD FNAME]'s [spouse/partner]?

[INSTR: "IF [CHILD'S SPOUSE FNAME] IS DECEASED, ENTER '5"]

(Is [CHILDn's SPOUSE/PARTNER FIRST NAME] still [CHILD FNAME]'s [spouse/partner]?)

[INSTR: VERIFY SPOUSE NAME'S SPELLING, IF NECESSARY]

[INSTR: "IF [CHILD'S SPOUSE FNAME] IS DECEASED, ENTER '5"]

1. YES
2. YES, BUT spouse's NAME IS MISSPELLED (specify) [A972S]GO TO END OF X058 CHILD LOOP PART TWO
3. [CHILDn's SPOUSE/PARTNER FIRST NAME] IS NOW [HIS/HER] SPOUSEGO TO END OF X058 CHILD LOOP PART TWO
5. NOGO TO X076A
6. No, [ChildN] WAS NEVER MARRIED OR PARTNERED TO THIS PERSONGO TO X096

NOTE: When a child no longer has the same spouse/partner as at the previous wave (X095=5), the relationship to R of that child-in-law is assigned as 'X061=31. Former child-in-law' and his/her information line becomes inactive.

X065 CHILD COUPLENESS ASSIGNMENT UPDATE

THE FOLLOWING COUPLENESS CODES ARE REASSIGNED TO X065 FOR THE CHILD BASED ON R's RESPONSE TO X095:

(X065=1): MARRIED: IF CHILD WAS MARRIED AT HH's LAST IW (PreviousX065=1) AND IS STILL MARRIED TO THE SAME SPOUSE (X095={1 or 2})

(X065=3): PARTNERED_VOL: IF CHILD WAS LIVING WITH A PARTNER AT HH's LAST IW (PreviousX065=3) AND IS STILL LIVING WITH THE SAME PARTNER (X095={1 or 2})

X076 BRANCHPOINT: IF CAWI and CHILD IS STILL MARRIED/PARTNERED TO SAME SPOUSE/PARTNER AS AT HH's LAST IW (X095={1 or 2}), GO TO END OF X058 (CHILD) LOOP PART TWO

IF CHILD IS STILL MARRIED/PARTNERED TO SAME SPOUSE/PARTNER AS AT HH's LAST IW (X095={1 or 2}), GO TO X081 (CHILD)

X076A

Is [CHILDn's SPOUSE/PARTNER FIRST NAME] still alive?

Is [CHILDn's SPOUSE/PARTNER FIRST NAME] still alive?

Is [CHILDn's SPOUSE/PARTNER FIRST NAME] still alive?

- 1. YES
 - 5. NO
 - 6. NOT SURE - [R HAS/I HAVE] NO CONTACT WITH THIS PERSON
- RF

NOTE: If child's former spouse/partner is no longer living (X076=5), that child-in-law is assigned a residency code of '4. died' at X056 on the roster. Otherwise, the residency code remains the same, though the line for this ex-/late child-in-law becomes inactive.

X096A

(Is [CHILDn FIRST NAME] married?)

IS [CHILDn FIRST NAME] married?

(Is [CHILDn FIRST NAME] married?)

- 1. YES.....GO TO A958
 - 5. NO
- DK
RF

NOTE: IF THE CHILD HAS A NEW SPOUSE/PARTNER, A NEW FIELD OPENS FOR THE NEW SPOUSE/PARTNER WITH A NEW PERSON INDEX.

X097A

(Is [CHILDn FIRST NAME] living with a partner as if married?)
Is [CHILDn FIRST NAME] living with a partner as if married?
(Is [CHILDn FIRST NAME] living with a partner as if married?)

- 1. YES
- 5. NO.....GO TO END OF X058 (CHILD) LOOP
- DK.....GO TO END OF X058 (CHILD) LOOP
- RF.....GO TO END OF X058 (CHILD) LOOP

A958A

(What is [CHILDn FIRST NAME]'s spouse/partner's first name?)
What is [CHILDn FIRST NAME]'s [spouse/partner]'s first name and sex?
(What is [CHILDn FIRST NAME]'s spouse/partner's first name?)

NAME _____

- DK
- RF

A960A

(What is [CHILDn's NEW SPOUSE/PARTNER FIRST NAME]'s sex?)
Sex (Dropdown)
(What is [CHILDn's NEW SPOUSE/PARTNER FIRST NAME]'s sex?)

- 1. MALE
- 2. FEMALE

A971A BRANCHPOINT: IF R [LIVES/LIVED IN A NURSING HOME (A028=1) AND (R IS SINGLE (A038=6)], ASSIGN 5 TO A971A AND GO TO END OF X058 CHILD LOOP

IF R [LIVES/LIVED IN A NURSING HOME (A028=1) AND LIVES/LIVED WITH SPOUSE/PARTNER (A030=1)], ASSIGN 5 TO A971A AND GO TO END OF X058 (CHILD) LOOP PART TWO.

A971A

IF R IS IN A NURSING HOME (A028=1):
Does [CHILDn's NEW SPOUSE/PARTNER FIRST NAME] live with your [husband/wife/partner]?)

OTHERWISE:
Does [CHILDn's NEW SPOUSE/PARTNER FIRST NAME] live with you?

IF R IS IN A NURSING HOME (A028=1):
(Did CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with [you/ R's FIRST NAME's]
[husband/wife/partner]?)

OTHERWISE:
(Did CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with [you/ R's FIRST NAME]?)

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

1. YESGO TO X058 CHILD LOOP PART TWO
2. YES, BUT [HE/SHE] IS TEMPORARILY AWAY AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS (E.G., IN SCHOOL, TRAVELLING)GO TO END OF X058 CHILD LOOP PART TWO
5. NOGO TO END OF X058 CHILD LOOP PART TWO
6. NO, [I HAVE/R HAS] NO CONTACT WITH [HIM/HER].....GO TO END OF X058 CHILD LOOP PART TWO

A956A

A956 BRANCHPOINT: IF R {LIVES/LIVED IN A NURSING HOME (A028=1) and {R IS SINGLE (A038=6), ASSIGN 5 to A956 AND GO TO X081

IF R {LIVES/LIVED IN A NURSING HOME (A028=1) and LIVES/LIVED WITH SPOUSE/PARTNER (A030=1), ASSIGN 5 to A956 AND GO TO X081 (CHILD)

IF R IS IN A NURSING HOME (A028=1):
(Does CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with your [husband/wife/partner]?)

OTHERWISE:
(Does CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with you?)

IF R IS IN A NURSING HOME (A028=1):
(Did CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with [you/ R's FIRST NAME's]
[husband/wife/partner]?)

OTHERWISE:
(Did CHLDn's NEW SPOUSE/PARTNER FIRST NAME live with [you/ R's FIRST NAME]?)

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

1. RESIDENT
 2. AWAY/INST: THE PERSON IS TEMPORARILY AWAY (IN SCHOOL, JAIL, REHAB, ETC.) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 3. AWAY/OTHER: THE PERSON IS TEMPORARILY AWAY (FOR ANOTHER REASON, SUCH AS TRAVELLING) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 4. DIED
 5. NONRESIDENT
 6. HAVE NO CONTACT
 7. DELETE
 8. DUPLICATE
- DK
RF

END OF X058 (CHILD) LOOP: if there is another preloaded child on the child roster, questions X058 through X081 (child) are asked, as necessary, about the next child(-in-law) on the roster. When all preloaded children are accounted for, R will be asked if they have any other children (A208), and will be asked X058 through X081 if more children are reported.

CAWI NOTE: END OF X058 (CHILD) LOOP PART TWO: if there is another preloaded child on the child roster, questions A226 through A956 (child) are asked, as necessary, about the next child(-in-law) on the roster.

Children loop grid

HHM Loop Grid Begins

A090 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW and R IS CALCULATED TO HAVE NO HHMS REPORTED FROM HH's LAST WAVE IW and R LIVED IN A NURSING HOME (A028=1), GO TO A212 BRANCHPOINT

IF {R IS CALCULATED TO HAVE NO HHMS REPORTED FROM HH's LAST WAVE IW and R LIVES IN NURSING HOME (A028=1)} and {IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} BOTH LIVE IN A NURSING HOME (A030=1 or A028 and A033=1)}, GO A212 BRANCHPOINT

A090

Next we'd like to talk about [other] members of your household.

IF R HAS RESIDENT CHILDREN:

Since we already talked about your children, you won't need to add them in the next few questions.

Next we'd like to talk about [other] members of your household.

-IF R HAS RESIDENT CHILDREN:

Since we already talked about your children and whether they live with you, you won't need to add them in the next few questions.

Next we'd like to talk about [other] members of [R FNAME's] household [just before [she/he] died]

-IF R HAS RESIDENT CHILDREN:

Since we already talked about [R FNAME's] children and whether they lived with [RName], you won't need to add them in the next few questions.

1. CONTINUE

NOTE: A DIFFERENT CODEFRAME COULD APPEAR FOR THE QUESTIONS ABOVE, DEPENDING ON OTHER CONDITIONS ASSOCIATED WITH THE RESPONDENT.

FIRST NAME (X058)
RELAT TO R (X061)
RELAT TO R'S SPP (X063)
SEX (X060)
RES (X056)
MOVED OR DIED MO (X072)
MOVED OR DIED YR (X073)
A186_X075 DUP OF (X075)
SAME SPP (X095)
WHAT HAPPENED (X076)
X096 MAR (X065)
X097 PART (X065)
NEW SPP FIRST NAME (A958)
NEW SPP SEX (A960)
NEW SPP RES (A956)
COMMENT (X081)

NOTE: THE REFERENCE IN PARENTHESES UNDER THE DESCRIPTIVE PORTION OF THE COLUMN HEADING (E.G., (X065) FOR 'MARRIED') IS THE VARIABLE WHERE THE MARITAL STATUS IS STORED. ANY REFERENCE ABOVE THE DESCRIPTION IS THE FIELD NAME FOR THE QUESTION THAT ASKS FOR THAT INFORMATION (X096). WHERE THERE IS NO REFERENCE ABOVE THE DESCRIPTION (E.G., 'FIRST NAME') THE VARIABLE NAME AND FIELD NAME ARE THE SAME (X058).

QUESTIONS:

NOTE: THE ROSTER DISPLAYS TO THE IWER ALL PRELOADED NON-CHILD HH RESIDENTS/HH MEMBERS (HHMs) REPORTED FOR R AND HIS/HER SPOUSE/PARTNER IN THE LAST IW OR AT THE SCREENER. THE IWER VERIFIES AND UPDATES INFORMATION ABOUT PRELOADED HHMs, AS NECESSARY, THROUGH THE QUESTION SERIES A058 THROUGH X081. WHEN ALL PRELOADED HHMs ARE ACCOUNTED FOR, R IS ASKED IF THEY HAVE ANY OTHER CHILDREN (A208), THEN THE IWER ADDS NAMES AND INFORMATION OF NEW HHMs (NOT SHOWN ON PRELOADED HHM ROSTER). THE CODED CATEGORIES ARE SIMILAR TO THOSE FOR THE CHILD ROSTER.

A208 (HHM) BRANCHPOINT: IF THERE ARE PRELOADED HHM's LISTED (X058 NOT EMPTY), GO TO X058 (HHM)

IF THIS IS AN EXIT INTERVIEW and R LIVES/LIVED IN NURSING HOME (A028=1), GO TO A212 BRANCHPOINT

IF R LIVES/LIVED IN NURSING HOME (A028=1) and {IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} BOTH LIVE IN A NURSING HOME (A030=1 or A028 and A033=1)}, GO TO A212 BRANCHPOINT

A208A

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

Is there anyone **else** who lives with your [husband/wife/partner]?

OTHERWISE:

Is there anyone **else** who lives with you [and your HWPS]?

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

Is there anyone **else** who lives with your [husband/wife/partner]?

OTHERWISE:

Is there anyone **else** who lives with you [and your HWPS]?

Was there anyone **else** who lived with(you/ R's FIRST NAME)?

1. YES

5. NO.....GO TO A212 BRANCHPOINT

DK.....GO TO A212 BRANCHPOINT

RF.....GO TO A212 BRANCHPOINT

- 1. YES.....GO TO X058A
- 5. NO
- DK
- RF

CAWI NOTE: *BEGINNING OF A221 (CHILD) LOOP PART ONE: QUESTIONS A221 THROUGH A225 ARE ASKED FOR EACH CHILD WHO WAS PRELOADED FROM THE PREVIOUS HOUSEHOLD INTERVIEW OR WHO WAS RECORDED IN THE SCREENER. THE OBJECT IS TO VERIFY OR CORRECT NAME, REL TO R, REL TO SPP, SEX, AND LIVING STATUS FOR EACH CHILD, AND ADDING NEW CHILDREN AS NECESSARY. WHEN ALL PRELOADED CHILDREN ARE ACCOUNTED FOR, R IS ASKED IF THEY HAVE ANY OTHER CHILDREN (A208), AND WILL BE ASKED X058 THROUGH A225 IF MORE CHILDREN ARE REPORTED. *****

A221 (HHM) BRANCHPOINT: IF THIS IS A NEWLY ADDED HHM OR CAPI, GO TO X058

A221

[Let's start with/Let's talk about] [HHM's Name].] Is all the information we have listed below correct?

- First name: [HHM's name-X058]
- Relationship to you: [HHM's relationship to R-X061]
- Relationship to your [hwps]: [HHM's relationship to R's spouse/partner-X063]
- Sex: [HHM's sex-x060]
- Alive or deceased: [HHM's living status-x056]

- 1. YES, THIS INFORMATION IS ACCURATE.GO TO END OF X058 (CHILD) LOOP PART ONE
- 5. NO, THIS INFORMATION NEEDS UPDATINGGO TO X058 (CHILD)
- DK [HIDE]
- RF [HIDE]

*****Beginning of X058 (HHM) LOOP: questions X058 through X081 are asked for each non-child HHM.*****

X058A

[INSTR: Ask, record, probe as necessary.]

IF THIS IS A PRELOADED HHM:

[INSTR: This is a preloaded HH member from the prior wave. Please verify the spelling of the HH member’s first name and update other information, if appropriate.]

OTHERWISE:

(What is his or her first name?)

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.] -

IF THIS IS A PRELOADED HHM:

Please take a moment to review the below information we have for [HHM NAME] and make corrections as necessary. When you are finished, select “Next” to continue.

IF THIS IS A NEWLY ADDED HHM:

Please enter information for this new member of your household.

[INSTR: Ask, record, probe as necessary.]

IF THIS IS A PRELOADED HHM:

[INSTR: This is a preloaded HH member from the prior wave. Please verify the spelling of the HH member’s first name and update other information, if appropriate.]

OTHERWISE:

(What is his or her first name?)

IF THIS IS A NEW HHM:

NAME _____

RF.....GO TO A208

OTHERWISE:

NAME _____

FIRST NAME _____

NOTE:

If the R doesn't give HHM name, then we'll skip the rest of the HHM grid and we will not ask any more questions about this HH member

X061A

[INSTR: Ask, record, probe as necessary.]

(What is HHMn FIRST NAME's relationship to you?)

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

Relationship to you (Dropdown)

[INSTR: Ask, record, probe as necessary.]

(What was HHMn FIRST NAME's relationship to R's FIRST NAME?)

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

HHM GRID - RELATIONSHIP TO R

- 9. GRANDCHILD
- 10. FATHER
- 11. FATHER-IN-LAW
- 35. STEP-FATHER
- 12. MOTHER
- 13. MOTHER-IN-LAW
- 36. STEP-MOTHER
- 15. BROTHER
- 16. BROTHER OF SPOUSE/PARTNER (BROTHER-IN-LAW)
- 17. SISTER
- 18. SISTER OF SPOUSE/PARTNER (SISTER-IN-LAW)
- 19. OTHER RELATIVE
- 20. OTHER INDIVIDUAL
- 30. FORMER STEP-CHILD
- 32. R DOES NOT KNOW THIS PERSON
- 33. GRANDCHILD'S SPOUSE OR PARTNER

RELATIONSHIP TO YOU (DROPDOWN)

Relationship codes to display for HHMs:

- 9. GRANDCHILD
- 10. FATHER
- 11. FATHER-IN-LAW (or partner's father)
- 35. STEPFATHER
- 12. MOTHER
- 13. MOTHER-IN-LAW (or partner's mother)
- 36. STEPMOTHER
- 15. BROTHER
- 16. BROTHER-IN-LAW (OR BROTHER OF PARTNER)
- 17. SISTER
- 18. SISTER-IN-LAW (OR SISTER OF PARTNER)
- 19. OTHER RELATIVE
- 20. OTHER INDIVIDUAL
- 30. FORMER STEP-CHILD
- 32. I DON'T KNOW THIS PERSON
- 33. GRANDCHILD'S SPOUSE OR PARTNER

NOTE: Interviewer selects relationship from list. When the list of relationship options first appears, only those are shown that do not have brackets (above): i.e., codes 9-20, 32,33; however, for preloaded HHM's, '97. Expand list' is also shown. If '97' is selected then additional relationships (in brackets here) are also shown. For new HHM, added this wave, there is no option to expand the list: '97' is not shown.

NOTE: CODE '97. EXPAND LIST' ONLY SHOWS FOR PRELOADED HHM; CHILDREN WHETHER PRELOADED OR ADDED THIS WAVE DO NOT SHOW UP ON THE HHM GRID.

X063 (HHM) BRANCHPOINT: IF R DOES NOT HAVE A {SPOUSE or PARTNER} (X065 {NOT 1 and NOT 3}), GO TO X060 (HHM)

X063A

[INSTR: Ask, record, probe as necessary.]

What is the relationship of HHMn's FIRST NAME to your (current) [husband/wife/partner]?

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

Relationship to your [husband/wife/partner/spouse] (Dropdown)

[INSTR: Ask, record, probe as necessary.]

What (was/is) the relationship of HHMn's FIRST NAME to (you/ R's FIRST NAME's [husband/wife/partner])?

[INSTR: Adapt your probes and questions to gather the best information and use comments to explain complicated situations.]

HHM GRID - RELATIONSHIP TO R's spouse/partner

- 9. GRANDCHILD
- 10. FATHER
- 11. FATHER-IN-LAW
- 35. STEP-FATHER
- 12. MOTHER
- 13. MOTHER-IN-LAW
- 36. STEP-MOTHER
- 15. BROTHER
- 16. BROTHER OF SPOUSE/PARTNER (BROTHER-IN-LAW)
- 17. SISTER
- 18. SISTER OF SPOUSE/PARTNER (SISTER-IN-LAW)
- 19. OTHER RELATIVE
- 20. OTHER INDIVIDUAL
- 30. FORMER STEP-CHILD
- 32. R DOES NOT KNOW THIS PERSON
- 33. GRANDCHILD'S SPOUSE OR PARTNER

RELATIONSHIP TO YOUR [HWPS] (DROPDOWN)

Relationship codes to display for HHMs:

- 9. GRANDCHILD
- 10. FATHER
- 11. FATHER-IN-LAW (or partner's father)
- 35. STEPFATHER
- 12. MOTHER
- 13. MOTHER-IN-LAW (or partner's mother)
- 36. STEPMOTHER
- 15. BROTHER
- 16. BROTHER-IN-LAW (OR BROTHER OF PARTNER)
- 17. SISTER
- 18. SISTER-IN-LAW (OR SISTER OF PARTNER)
- 19. OTHER RELATIVE
- 20. OTHER INDIVIDUAL
- 30. FORMER STEP-CHILD
- 32. I DON'T KNOW THIS PERSON
- 33. GRANDCHILD'S SPOUSE OR PARTNER

[INSTR: Ask, record, probe as necessary.]

(What is HHMn FIRST NAME's sex?)

Sex (Dropdown)

[INSTR: Ask, record, probe as necessary.]

(What is HHMn FIRST NAME's sex?)

1. MALE
2. FEMALE

A225(HHM) BRANCHPOINT: IF THIS IS A NEWLY ADDED HHM, GO TO END OF X058 (HHM) LOOP PART ONE.

A225

[INSTR: Ask, record, probe as necessary.]

(Is [HHMn FIRST NAME] still alive?)

Alive or deceased (Dropdown)

1. ALIVE
4. DECEASED

A235(HHM) BRANCHPOINT: IF THIS IS A CAPI INTERVIEW, GO TO A246 BRANCHPOINT

A235

[INSTR: Ask, record, probe as necessary.]

Does [she/he] live with [you/R FName]?

Lives with you (Dropdown)

1. YES
5. NO

A246 (CHILD) BRANCHPOINT: IF THIS A CAWI IW, GO TO END OF X058(HHM) LOOP ELSE. ASK.

A246

[INSTR: Ask, record, probe as necessary.]

[INSTR: IS [CHILD FNAME] A DUPLICATE?]

1. YES
5. NO

X081

[INSTR: Ask, record, probe as necessary.]

[INSTR: ENTER ANY COMMENTS HERE]

CAWI NOTE: END OF X058 (HHM) LOOP PART ONE: IF THERE IS ANOTHER PRELOADED HHM ON THE HHM ROSTER, QUESTIONS X058 THROUGH A235 (HHM) ARE ASKED, AS NECESSARY, ABOUT THE NEXT HHM ON THE ROSTER. WHEN ALL PRELOADED HHM ARE ACCOUNTED FOR, R WILL BE ASKED IF THEY HAVE ANY OTHER HHM (A208), AND WILL BE ASKED X058 THROUGH A235 IF MORE HHM ARE REPORTED. IF ALL HHM ARE ACCOUNTED FOR PLEASE CONTINUE TO A224_HHMSUMMARY.

A228(HHM) BRANCHPOINT: IF THIS IS A CAPI INTERVIEW, WITH NO PRELOADED HHM AND NO NEWLY ADDED HHM, GO TO A212 BRANCHPOINT

A228

IF NO PRELOADED HHM OR NO NEWLY ADDED HHM:

[INSTR: NOT INCLUDING SPOUSES, PARTNERS, OR CHILDREN, R DOES NOT HAVE ANYONE ELSE LIVING WITH THEM IN THEIR HOME.]

[INSTR: IF THIS IS CORRECT, SELECT '1' TO CONTINUE. OTHERWISE CLICK ON ADD A RESIDNET.]

[INSTR: ONCE YOU SELECT '1' TO CONTINUE ON THIS SCREEN YOU WILL NO LONGER BE ABLE TO ADD A RESIDENT.]

[INSTR: SELECT '1' TO CONTINUE.]

OTHERWISE:

[INSTR: CONFIRM THIS INFORMATION WITH THE RESPONDENT BEFORE PROCEEDING TO THE NEXT SCREEN.]

[INSTR: IF ANY OF THE INFORMATION IS INCORRECT, PLEASE CLICK ON THE NAME ON THE RIGHT TO GO BACK AND CHANGE IT. IF ANY HHM IS MISSING CLICK 'ADD A HHM'. IF THE INFORMATION IS CORRECT, SELECT '1' TO CONTINUE.]

[HHM SUMMARY TABLE : Resident's NAME, RELATION TO R, RELATION TO R's [H,W,PS,S], SEX, ALIVE OR DECEASED]

[INSTR: THIS SUMMARY SHOULD NOT INCLUDE SPOUSES, PARTNERS, OR CHILDREN.]

[INSTR: THIS IS A "GATE" QUESTION. ENTERING '1' ON THIS SCREEN WILL LOCK YOU OUT OF MAKING CHANGES. ONCE YOU KNOW FOR CERTAIN THAT NO CHANGES ARE NEEDED, SELECT '1' THEN [ENTER] TO CONTINUE.]

IF NO PRELOADED HHM OR NO NEWLY ADDED HHM:

Just to confirm, not including spouses, partners, or children no one else is liVing in your home in [City, State]. If this incorrect, please click on the "Add a resident" button on the right.

Once you press the "Next" button on this screen you will no longer be able to add a resident.

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

OTHERWISE:

The table below is a summary of the information that you just entered or confirmed about people who live with you now or who lived with you [in LAST FAM R IW MONTH, YEAR/the last time we asked you]. This summary should not include spouses, partners, or children. Please review this information.

[INSTR: IF YOU SEE DUPLICATE NAMES ON THIS LIST, PLEASE DESCRIBE THE PROBLEM USING THE COMMENT BUTTON]

Resident's Name	Relation To you	Relation to your [HWP]	Sex	Alive or Deceased	Lives with you

·If the information above is correct select 'Next' to continue.

·If the information above is correct select 'Next' to continue.

·If any of the information is incorrect, please click on the resident's name in the list on the right to go back and change it.

·If any resident is missing click 'Add a resident' in the list on the right.

Once you press the "Next" button on this screen you will no longer be able to add to or edit this list.

CAWI NOTE: ***

*****BEGINNING OF X058 (HHM) LOOP PART TWO: *****

A090 DUMMY: IF R ATTEMPTS TO GO BACK TO THE HHM ROSTER, CONTINUE.

ELSE: GO TO A226 BRANCHPOINT

A090_dummy

Resident's Name	Relation To you	Relation to your [HWP]	Sex	Alive or Deceased	Lives with you

If there something important you would like us to know, please use the F2 comment to provide the information.

A226 BRANCHPOINT: IF R DOESN'T KNOW HHM (X061=32) THEN ASSIGN 7. DELETE AT X056 AND GO TO THE NEXT HHM.

IF R LIVES/LIVED IN A NURSING HOME (A028=1) AND (R IS SINGLE (A038=6), ASSIGN 5 TO A226 AND GO TO X072 BRANCHPOINT.

IF R [LIVES/LIVED IN A NURSING HOME (A028=1) AND LIVES/LIVED WITH SPOUSE/PARTNER (A030=1), ASSIGN 5 TO A226 AND GO TO X072 BRANCHPOINT.

A226

IF R LIVES/LIVED IN NURSING HOME (A028=1):
(Does HHM FIRST NAME live with your [husband/wife/partner]?)

OTHERWISE:

First time Intro:

We have a few more questions about each person who lives in turn, starting with [HM's name].

Subsequent Intro:

Now we have some questions about your [HHM's name] (HHM's relationship to R).

Ask ALL:

Just to confirm, does [HHM's name] [still] live with you?

First time Intro:

We have a few more questions about each person who lives with you in turn, starting with [HHM name]

Subsequent Intro:

Now we have some questions about your [HHM's relationship to R] [HHM's name].

Ask ALL:

Just to confirm, does [HHM's name] [still] live with you?

First time Intro:

We have a few more questions about each person who lived with [R's FIRST NAME] in turn, starting with [HHM's name]

Subsequent Intro:

Now we have some questions about [HHM's name] (HHM's relationship to R).

Ask ALL:

Just to confirm, did [HHM's name] live with [R FNAME]?

SHOW FOR ALL EXIT IWS:

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

1. YESGO TO X072 BRANCHPOINT
2. YES, BUT [HE/SHE] IS TEMPORARILY AWAY AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS (E.G., IN SCHOOL, TRAVELLING)GO TO X072 BRANCHPOINT
5. NOGO TO X072 BRANCHPOINT
6. NO, [I HAVE/R HAS] NO CONTACT WITH THIS PERSONGO TO X072 BRANCHPOINT
- DK [HIDE]GO TO X072 BRANCHPOINT
- RF [HIDE]GO TO X072 BRANCHPOINT

X056 (HHM) BRANCHPOINT: IF R {LIVES/LIVED IN A NURSING HOME (A028=1) and THIS IS AN EXIT INTERVIEW or {R IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} ARE BOTH LIVING IN A NURSING HOME (A030=1 or A028 and A033=1)}, ASSIGN "5. NONRESIDENT" AND GO TO X072 (HHM) BRANCHPOINT

X056A

(HHM)

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

(Does HHMn FIRST NAME live with your [husband/wife/partner]?)

OTHERWISE:

(Does HHMn FIRST NAME live with you?)

(HHM)

(Did HHMn FIRST NAME live with [you/ R's FIRST NAME]?)

[INSTR: RESIDENCY STATUS IS AS OF THE RESPONDENT'S TIME OF DEATH]

[INSTR: IF R HAS NO CONTACT WITH A CHILD OR STEP-CHILD, PLEASE SELECT CODE 6. HAVE NO CONTACT]

1. RESIDENT
 2. AWAY/INST: THE PERSON IS TEMPORARILY AWAY (IN SCHOOL, JAIL, REHAB, ETC.) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 3. AWAY/OTHER: THE PERSON IS TEMPORARILY AWAY (FOR ANOTHER REASON, SUCH AS TRAVELLING) AND DOES NOT HAVE ANY OTHER PERMANENT ADDRESS
 4. DIED
 5. NONRESIDENT
 6. HAVE NO CONTACT
 7. DELETE.....GO TO X081
 8. DUPLICATE.....GO TO A186/X075
- DK
RF

X072 BRANCHPOINT: IF THIS IS NOT A REINTERVIEW HOUSEHOLD (X024 NOT 1), GO TO X096 (HHM)

IF R DID NOT REPORT IN THIS IW THAT A HHM DIED or MOVED {INTO or OUT OF} HH RESIDENCE (X056), GO TO X096 (HHM)

X072A

(HHM)

IF HH MEMBERn DIED ({X056=4} and AT HH's LAST IW {HHMn WAS LIVING ({Preload_X056} NOT 4})):

In what month and year did HHMn's FIRST NAME die?

IF HH MEMBERn MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {HHMn WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY})):

In what month and year did [you/your [husband/wife/partner]] and HHMn's FIRST NAME start living together?

IF HH MEMBERn MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW HH MEMBERn WAS RESIDENT ({Preload_X056}=1)):

In what month and year did [you/your [husband/wife/partner]] and HHMn's FIRST NAME stop living together?

IF HHM DIED ({X056=4} and AT HH's LAST IW {HHM WAS LIVING ({Preload_X056} NOT 4}):

In what month and year did [HHM'S FIRST NAME] die?

IF HHM MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {HHM WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY}):

In what month and year did [you/your [husband/wife/partner]] and [HHM's FIRST NAME] start living together?

IF HHM MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW HHM WAS RESIDENT ({Preload_X056}=1):

In what month and year did [you/your [husband/wife/partner]] and [HHM's FIRST NAME] stop living together?

(HHM)

IF HH MEMBERn DIED ({X056=4} and AT HH's LAST IW {HHMn WAS LIVING ({Preload_X056} NOT 4})):

In what month and year did HHMn's FIRST NAME die?

IF HH MEMBERn MOVED INTO HH (X056={1 or 2 or 3} and AT HH's LAST IW {HHMn WAS NON-RESIDENT or WE DON'T KNOW} ({Preload_X056}= {5 or EMPTY})):

In what month and year did R's FIRST NAME and HHMn's FIRST NAME start living together?

IF HH MEMBERn MOVED OUT OF HH (X056={2 or 3 or 5} and AT HH's LAST IW HH MEMBERn WAS RESIDENT ({Preload_X056}=1})):

In what month and year did R's FIRST NAME and HHMn's FIRST NAME stop living together?

MONTH:

1. JAN
 2. FEB
 3. MAR
 4. APR
 5. MAY
 6. JUN
 7. JUL
 8. AUG
 9. SEP
 10. OCT
 11. NOV
 12. DEC
- DK
RF

X073A

YEAR _____

- DK
RF

A186_X075/X075 (HHM) BRANCHPOINT: IF R LIVES/LIVED IN NURSING HOME (A028=1} and {IS SINGLE (A038=6) or {R AND SPOUSE/PARTNER} BOTH LIVE IN A NURSING HOME (A030=1 or A028 and A033=1})), GO TO X081

OTHERWISE, GO TO X096

A186A_X075A

(HHM)

[INSTR: CHOOSE THE PERSON THIS IS A DUPLICATE OF]

(HHM)

[INSTR: CHOOSE THE PERSON THIS IS A DUPLICATE OF]

NAME(S) OF ALL PEOPLE ON PEOPLE TABLE EXCEPT CHILDREN & RESPONDENTS
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

53. THROUGH 72. NON-CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]

71. NOT ON LIST

DK

RF

*NOTE: THE LIST SHOWS NAMES OF ALL PEOPLE, LIVING AND DEAD, WHO ARE ASSOCIATED
WITH THE RESPONDENTS, EXCEPT FOR CHILDREN AND THE RESPONDENTS.*

X096 (HHM) BRANCHPOINT: GO TO X081

X096A

(HHM)

(Is HHMn FIRST NAME married?)

Is [HHM FIRST NAME] married?

(HHM)

(Is HHMn FIRST NAME married?)

1. YES.....GO TO A187_X070

5. NO

DK

RF

X097A

(HHM)

(Is HHMn FIRST NAME living with a partner as if married?)

Is [[HHM FIRST NAME] living with a partner as if married?

(HHM)

(Is HHMn FIRST NAME living with a partner as if married?)

1. YES.....GO TO A187_X070

5. NO

DK

RF

A187_X070 BRANCHPOINT: IF THIS HHM IS NOT R's GRANDCHILD (X061 NOT 9), GO TO X081

(HHM)

A187A_X070A

(HHM)
IF HHM IS A GRANDCHILD (X061=9):
(Who is HHMn FIRST NAME's parent?)
IF HHM IS A GRANDCHILD:
Who is [HHM's First Name]'s parent?

(HHM)
IF HHM IS A GRANDCHILD (X061=9):
(Who is HHMn FIRST NAME's parent?)

IF HHM IS A GRANDCHILD (X061=9):
CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
71. NOT ON LIST
DK
RF

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

(HHM)
IF HHM IS NOT A GRANDCHILD (X061 NOT 9):
(Who is HHMn FIRST NAME's (spouse/partner)?)
IF HHM IS NOT A GRANDCHILD (X061 NOT 9):
Who is [HHM's First Name]'s [spouse/partner]?

(HHM)
IF HHM IS NOT A GRANDCHILD (X061 NOT 9):
(Who is HHMn FIRST NAME's (spouse/partner)?)

NAME(S) OF ALL PEOPLE ON PEOPLE TABLE EXCEPT CHILDREN & RESPONDENTS
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
53. THROUGH 72. NON-CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
71. NOT ON LIST
98. DK
99. RF

NOTE: THE LIST SHOWS NAMES OF ALL PEOPLE, LIVING AND DEAD, WHO ARE ASSOCIATED WITH THE RESPONDENTS, EXCEPT FOR CHILDREN.

X069 (HHM) BRANCHPOINT: IF THIS HHM IS NOT A GRANDCHILD (X061 NOT 9) or REPORTED THE GRANDCHILD's PARENT IS NOT ON THE LIST (X070=71), GO TO X081 (HHM)

X069A

(HHM) {CORE & EXIT}

(How is HHMn FIRST NAME related to PERSONn FIRST NAME from X070?)

How is [HHM FIRST NAME] related to [Person First Name from X070]?

(HHM) {CORE & EXIT}

(How is HHMn FIRST NAME related to PERSONn FIRST NAME from X070?)

RELATIONSHIP OF GRANDCHILD TO PARENT

3. SON

4. STEPSON

5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)

6. DAUGHTER

7. STEPDAUGHTER

8. SPOUSE/PARTNER OF SON (DAUGHTER-IN-LAW)

DK

RF

NOTE: IWER SELECTS RELATIONSHIP FROM LIST.

*****END OF X058 (HHM) LOOP: IF THERE IS ANOTHER PRELOADED HHM ON THE HHM ROSTER, QUESTIONS X058 THROUGH X081 (HHM) ARE ASKED, AS NECESSARY, ABOUT THE NEXT HHM ON THE ROSTER. WHEN ALL PRELOADED HHMs ARE ACCOUNTED FOR, R WILL BE ASKED IF THEY HAVE ANY OTHER**

A212 BRANCHPOINT: IF R DID NOT REPORT DON'T KNOW AND DID NOT REFUSE TO ANSWER IF THERE ARE LIVING CHILDREN (A208 (CHILD) NOT DK and NOT RF), GO TO A213 BRANCHPOINT

A212

How many living children do you [and your [husband/wife/partner/spouse]] have?

[IWER: PLEASE INCLUDE BIOLOGICAL, STEP AND ADOPTED CHILDREN]

How many living children did [RESPONDENT NAME] and [her/his] [partner/husband/wife] have?

IWER: PLEASE INCLUDE BIOLOGICAL, STEP AND ADOPTED CHILDREN.

NUMBER OF LIVING CHILDREN _____

DK

RF

A213 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW and R WAS LIVING IN A NURSING HOME WHEN THEY DIED (A028=1), GO TO A112

IF R DID NOT REPORT DON'T KNOW AND DID NOT REFUSE TO ANSWER IF THERE ARE ANY HHMs (A090 and A208 (HHM) NOT DK and NOT RF), GO TO A112

A213

(Other than your [husband/wife/partner/spouse],) how many people live with you in your home in CURRENT MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION)?

At the time [RESPONDENT NAME] died, how many people lived with[her/him] in [her/his] home in [MAIN RESIDENCE CITY], [RESIDENCE STATE]?

NUMBER OF HOUSEHOLD MEMBERS_____

DK

RF

A112

A ASSIST
{CORE ONLY}

[INSTR: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION A - COVERSHEET?]

Please select "Next" to proceed.

A ASSIST
{EXIT ONLY}

[INSTR: SELECT CONTINUE TO CONTINUE THIS EXIT INTERVIEW]

CORE:

1. NEVER
2. A FEW TIMES
3. MOST OR ALL OF THE TIME
4. THE SECTION WAS DONE BY A PROXY REPORTER

EXIT:

1. CONTINUE

Move questions for deceased respondents (A136-A151)

A136 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO END OF SECTION A

IF THIS IS NOT AN EXIT INTERVIEW, GO TO END OF SECTION A

A136

IF R WAS NOT LIVING IN NURSING HOME WHEN S/HE DIED (A028 NOT 1):

Since [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R], did anyone move into the house or apartment where R's FIRST NAME was living to help [him/her] but then move out before [he/she] died?

IF R WAS LIVING IN NURSING HOME WHEN S/HE DIED (A028=1):

Between the time of our interview in [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] and when R's FIRST NAME went into the (nursing home/health care facility), did anyone move into the house or apartment where R's FIRST NAME was living to help [him/her] but then move out before [he/she] went into the (nursing home/health care facility)?

OTHERWISE:

In the two years preceding [his/her] death, did anyone move into the house or apartment where R's FIRST NAME was living to help [him/her] but then move out before R's FIRST NAME died?

- 1. YES
- 5. NO.....GO TO A142
- DK.....GO TO A142
- RF.....GO TO A142

A137

Who moved in: was it (a child of R's FIRST NAME's,) a grandchild, another relative, or someone else?

[INSTR: SELECT ALL THAT APPLY]

- 1. PARENT
- 2. CHILD
- 4. GRANDCHILD
- 5. RELATIVE-OTHER
- 6. OTHER INDIVIDUAL
- DK
- RF

A138 BRANCHPOINT: IF R DID NOT SAY THAT A CHILD MOVED IN (A137 NOT 2), GO TO A142

IF R HAD ONLY ONE NON-RESIDENT CHILD (A100=1), ASSIGN THAT CHILD TO A138 AND TO A139 AND GO TO A140

IF R DID NOT A HAVE NON-RESIDENT CHILD (A100=0), GO TO A140

A138

Which children?

[INSTR: SELECT ALL THAT APPLY]

CHILD - SPOUSE/PARTNER NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

03. THROUGH 52. CHILD NAME(S) - SPOUSE/PARTNER NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

93. ALL CHILDREN

DK

RF

NOTE: THE LIST SHOWS NAMES OF COUPLES, THAT OF THE CHILD/STEPCHILD FOLLOWED BY THE NAME OF THE SPOUSE/PARTNER, IF ANY, PROVIDED AT LEAST ONE MEMBER OF THE COUPLE WAS LIVING AND IN CONTACT, AND THE CHILD WAS NOT CLASSIFIED AS RESIDENT/AWAY_INST/AWAY_OTHER (X056 {NOT 1 and NOT 2 and NOT 3}) AT THE TIME OF R's DEATH. THE LIST DOES NOT INCLUDE COUPLES WHERE BOTH MEMBERS ARE DEAD NOR WHERE NEITHER IS IN CONTACT.

A139 BRANCHPOINT: IF ONLY ONE CHILD NAME WAS SELECTED AT A138, ASSIGN THAT CHILD TO A139 AND GO TO A140

IF {DK or RF} WAS SELECTED AT A138, GO TO A140

A139

Which child stayed the longest?

[INSTR: SELECT ALL THAT APPLY]

CHILD - SPOUSE/PARTNER NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

03. THROUGH 52. CHILD NAME(S) - SPOUSE/PARTNER NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

DK

RF

NOTE: THE LIST SHOWS NAMES OF COUPLES SELECTED AT A138.

A140

About how many weeks or months did that [child/person] stay?

Please tell me the longest stay if there was more than one person who stayed with R's FIRST NAME.

[INSTR: ENTER NUMBER OF WEEKS OR MONTHS]

AMOUNT OF TIME_____

DK.....GO TO A142

RF.....GO TO A142

A141

(About how many weeks or months did that [child/person] stay?)

(Please tell me the longest stay if there was more than one person who stayed with R's FIRST NAME.)

[(INSTR: ENTER NUMBER OF WEEKS OR MONTHS)]

2. WEEKS

4. MONTHS

DK

RF

A142

IF R WAS NOT LIVING IN NURSING HOME WHEN S/HE DIED (A028 NOT 1):

Between the time of our interview in [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] and R's FIRST NAME's death did R's FIRST NAME move into and then out of someone else's house or apartment?

IF R WAS LIVING IN NURSING HOME WHEN S/HE DIED (A028=1):

Between the time of our interview in [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] and when R's FIRST NAME went into the (nursing home/health care facility) did R's FIRST NAME move into and then out of someone else's house or apartment?

OTHERWISE:

In the two years preceding [his/her] death, did R's FIRST NAME move into and then out of someone else's house or apartment?

1. YES

5. NO.....GO TO A148 BRANCHPOINT

DK.....GO TO A148 BRANCHPOINT

RF.....GO TO A148 BRANCHPOINT

A143

With whom did [he/she] move in: was it (a child of R's FIRST NAME's,) a grandchild, another relative, or someone else?

[(INSTR: SELECT ALL THAT APPLY)]

- 1. PARENT
- 2. CHILD
- 4. GRANDCHILD
- 5. RELATIVE-OTHER
- 6. OTHER INDIVIDUAL
- DK
- RF

A144 BRANCHPOINT: IF R DID NOT MOVE IN WITH CHILD (A143 NOT 2),GO TO A148 BRANCHPOINT

IF R HAD ONLY ONE NON-RESIDENT CHILD (A100=1), ASSIGN THAT CHILD TO {A144 and A145} AND GO TO A146

IF R DID NOT A HAVE NON-RESIDENT CHILD (A100=0), GO TO A146

A144

Which children?

[INSTR: SELECT ALL THAT APPLY]

CHILD - SPOUSE/PARTNER NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

03. THROUGH 52. CHILD NAME(S) - SPOUSE/PARTNER NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]

93. ALL CHILDREN

- DK
- RF

NOTE: THE LIST SHOWS NAMES OF COUPLES, THAT OF THE CHILD/STEPCHILD FOLLOWED BY THE NAME OF THE SPOUSE/PARTNER, IF ANY, PROVIDED AT LEAST ONE MEMBER OF THE COUPLE WAS LIVING AND IN CONTACT, AND THE CHILD WAS NOT CLASSIFIED AS RESIDENT/AWAY_INST/AWAY_OTHER (X056 {NOT 1 and NOT 2 and NOT 3}) AT THE TIME OF R's DEATH. THE LIST DOES NOT INCLUDE COUPLES WHERE BOTH MEMBERS ARE DEAD NOR WHERE NEITHER IS IN CONTACT.

A145 BRANCHPOINT: IF ONLY ONE CHILD NAME WAS SELECTED AT A144, ASSIGN THAT CHILD TO A145 AND GO TO A146

IF {DK or RF} WAS SELECTED AT A144, GO TO A146

A145

With which child did [he/she] stay the longest?

[INSTR: SELECT ALL THAT APPLY]

CHILD - SPOUSE/PARTNER NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

03. THROUGH 52. CHILD NAME(S) - SPOUSE/PARTNER NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
DK
RF

NOTE: THE LIST SHOWS NAMES OF COUPLES SELECTED AT A144.

A146

About how many weeks or months did R's FIRST NAME stay with that [child/person]?

Please tell me the longest stay if there was more than one person R's FIRST NAME stayed with.

[INSTR: ENTER NUMBER OF WEEKS OR MONTHS]

AMOUNT OF TIME _____

DK.....GO TO A148 BRANCHPOINT
RF.....GO TO A148 BRANCHPOINT

A147

(About how many weeks or months did R's FIRST NAME stay with that [child/person]?)

(Please tell me the longest stay if there was more than one person R's FIRST NAME stayed with.)

[(INSTR: ENTER NUMBER OF WEEKS OR MONTHS)]

2. WEEKS
4. MONTHS
DK
RF

A148 BRANCHPOINT: IF R DID NOT HAVE ANY NON-RESIDENT CHILDREN (A100=0 or {per X061 and A056}), GO TO END OF SECTION A

A148

IF R WAS NOT LIVING IN NURSING HOME WHEN S/HE DIED (A028 NOT 1):

Between the time of our interview in [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] and when R's FIRST NAME died did [he/she] or any of [his/her] children move in order to be closer to each other but not living in the same house or apartment?

IF R WAS LIVING IN NURSING HOME WHEN S/HE DIED (A028=1):

Between the time of our interview in [LAST IW MONTH (per X034), YEAR (per X035) FOR LAST-WAVE'S 1ST R/LAST IW YEAR FOR LAST-WAVE'S 1ST R] and when R's FIRST NAME went into the (nursing home/health care facility) did [he/she] or any of [his/her] children move in order to be closer to each other but not living in the same house or apartment?

OTHERWISE:

In the two years preceding [his/her] death, did [he/she] or any of [his/her] children move in order to be closer to each other but not living in the same house or apartment?

1. YES

5. NO.....GO TO END OF SECTION A

DK.....GO TO END OF SECTION A

RF.....GO TO END OF SECTION A

A149 BRANCHPOINT: IF R HAD ONLY ONE NON-RESIDENT CHILD (A100=1), ASSIGN THAT CHILD TO A149 AND GO TO A150 LOOP BRANCHPOINT

A149

Which child was that?

[INSTR: SELECT ALL THAT APPLY]

CHILD - SPOUSE/PARTNER NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

03. THROUGH 52. CHILD NAME(S) - SPOUSE/PARTNER NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

93. ALL CHILDREN

DK

RF

NOTE: THE LIST SHOWS NAMES OF COUPLES, THAT OF THE CHILD/STEPCHILD FOLLOWED BY THE NAME OF THE SPOUSE/PARTNER, IF ANY, PROVIDED AT LEAST ONE MEMBER OF THE COUPLE IS LIVING AND IN CONTACT, AND THE CHILD IS NOT CLASSIFIED AS RESIDENT/AWAY_INST/AWAY_OTHER (X056 {NOT 1 and NOT 2 and NOT 3}) AT THE TIME OF R's DEATH. THE LIST DOES NOT INCLUDE COUPLES WHERE BOTH MEMBERS ARE DEAD NOR WHERE NEITHER IS IN CONTACT.

BEGINNING OF A150 LOOP BRANCHPOINT: IF NO CHILD(REN) WAS/WERE SELECTED OR ASSIGNED AT A149 (A149={DK or RF or EMPTY}), GO TO END OF SECTION A

*****BEGINNING OF A150 LOOP BRANCHPOINT: IF NO CHILD(REN) WAS/WERE SELECTED OR ASSIGNED AT A149 (A149={DK or RF or EMPTY}), GO TO END OF SECTION A**

A150

Did CHILDn NAME move or did R's FIRST NAME move?

1. CHILD MOVED
 2. R MOVED
 4. BOTH
- DK
RF

A151

Was the move intended to be temporary or was it thought of as permanent?

1. PERMANENT MOVE
 5. TEMPORARY MOVE
- DK
RF

*****END OF A150 LOOP: IF THERE IS ANOTHER CHILD MENTIONED AT A149, GO BACK TO BEGINNING OF A150 LOOP. IF NOT, CONTINUE ON TO SECTION B.*****