

HEALTH AND RETIREMENT STUDY
2015 Life History Mail Survey (LHMS)

Restricted Data

Residential History State Level Data

Data Description and Usage

Version 2.0, April 2025

To the Restricted Data Investigator: This restricted data set is intended for exclusive use by you and the persons specified in the *Agreement for Use of Restricted Data from the Health and Retirement Study* and/or the *Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study*.

If there are any questions about this data set and its use, refer to the HRS Restricted Data Web Site (<http://hrsonline.isr.umich.edu/rda>) or contact the HRS Help Desk (hrsquestions@umich.edu).

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1. Overview

The *2015 Life History Mail Survey (LHMS) Version 2.0* contains questions about residential history, education history, and other important childhood and family events.

The LHMS is part of the Health and Retirement Study (HRS), which is funded under a cooperative agreement between the National Institute on Aging (NIA) and the Survey Research Center at the University of Michigan. The HRS is designed to study labor force, health, and family transitions of the U.S. population aged 51 and older, and the impact of those transitions on economic resources, claims on structured programs such as Social Security, Medicare, and Medicaid, and informal assistance and transfers to and from family members.

The National Institute on Aging (NIA) provided funding (U01 AG009740) for the 2015 LHMS, which was conducted by the Survey Research Center (SRC), at the Institute for Social Research (ISR), at the University of Michigan.

This dataset extends the LHMS by including state residential information. By receiving access to this dataset, you agree to use it for research and statistical purposes only and make no effort to identify respondents. In addition, you agree to send us a copy of publications you produce based on the data. See **Obtaining the Data** (at the end of this document) for additional details.

The questions in the 2015 LHMS (Version 1.0) are based on several similar studies around the world, including: the English Longitudinal Study of Aging (ELSA), England, The Survey of Health, Ageing and Retirement in Europe (SHARELIFE), and the China Health and Retirement Longitudinal Study (CHARLS).

The restricted data include the actual state indicators for the residential histories whereas the public release LHMS 2015 state data includes an enumeration of state residence.

2. Sampling Information

In December 2015, questionnaires were mailed to a subsample of HRS respondents (n= 11,256). The sample for the 2015 LHMS consists of all living HRS respondents who were not included in the 2015 Consumption and Activities Mail Survey (CAMS) and who completed their most recent HRS core interview in English (rather than Spanish). The field period for the 2015 LHMS was December 2015 through summer 2016.

3. LHMS Content

3a. File Structure

The *2015 HRS LHMS Geographic State Level (Version 2.0)* records are presented at the state level. State-level files contain questions that were asked of all respondents about themselves (or were answered by a proxy for the respondent if the respondent was not able to fill out the questionnaire). The data file contains multiple records for each respondent or proxy who filled out and returned a 2015 LHMS questionnaire with valid residential history responses. The data consist of 38,607 records collected from 5,849 respondents, with each respondent contributing one or more records.

The data files are named LHMS15_STATE_RES HIST_V2, loosely translated as: Life History Mail Survey 2015, state-level data.

The primary identification variables (IDs) are:

- HHID HOUSEHOLD IDENTIFIER
- PN PERSON NUMBER

These data will need to be transposed before merging these data with and publicly available HRS product. To align these data with LHMS15 records, use LH5_EntryNum_15 to guide the reshaping from long to wide.

Records in the data files are sorted in order by HHID and PN and LH5_EntryNum_15. The variable PN refers to the respondent to whom the questionnaire was mailed. Please note that identification variables in the *HRS 2015 LHMS Geographic State Level (Version 2.0)* are stored in character format. For further information about HRS identification variables and merging data, see the Tracker Data Description and the Data Descriptions for each HRS Core wave.

3b. Variable Names and Labels

Column Name	Type	Length	Label
HHID	Text	6	HOUSEHOLD IDENTIFICATION NUMBER
PN	Text	3	RESPONDENT PERSON IDENTIFICATION NUMBER
LH5_ENTRYNUM_15	Text	8	ROW NUMBER OF DATA ENTERED BY R ON Q5
LH5_STARTYR_15	Number	8	RESIDENCE START YEAR
LH5_ENDYR_15	Number	8	RESIDENCE END YEAR
LH5_STATE_15	Text	8	RESIDENCE STATE
STATEFIPS	Text	2	NUMERIC U.S. FEDERAL INFORMATION PROCESSING STANDARDS (FIPS) CODE
REGION	Number	8	CENSUS BUREAU REGIONS AND DIVISIONS

Variable names begin with the letters LH to designate the Life History Mail Survey, followed by the question number and _15 to indicate the study wave.

As shown above, the variable label contains the question number found in the 2015 LHMS questionnaire. Unlike LHMS 2015 public data, these records are stacked. Use the values in

LH5_EntryNum_15 to determine which row of Table 5 (see below) the respondent recorded residential data.

INSTRUCTION AND TABLE COLUMNS SPAN ACROSS PAGES ►

Q5 On the next pages please fill in as much information as you can about **all the places that** **To begin, next to #1 please write your year of birth as the “start year” on the top row.** decade (e.g., late 1950s). If you lived outside the U.S., write the country name instead of the

#	Start Year	End Year	Street	City/Town	State
1	1951				
2	1952				
3	1969				
4	1970				

3c. Files Contained in this Release.

Directory	File	Type
.\docs\	lhms15_state_reshist_v2.pdf	Data Description (this file)
.\sas\	lhms15_state_reshist_v2.sas7bdat	SAS system file
.\stata\	lhms15_state_reshist_v2.dta	Stata system file

3d. Data Quality

Due to the skip patterns in this questionnaire, all missing answers are treated the same in the dataset and coded as simply “Answer not given/Missing.” This is true whether the respondent was “expected” to answer the question or not, based on earlier responses. In cases where the respondent recorded ditto marks, and provided either a start or end year, the last observation was carried forward. Records missing both start and end year were removed from the final dataset.

While cleaning the data, when extreme, unlikely or conflicting values were encountered, electronic images of the questionnaires were checked directly to determine if errors were introduced during the data entry/scanning process. This includes instances where a start year is greater than an end year, or a start age is greater than an end age. If the respondent reported the extreme or conflicting value, the value appears unchanged in the data.

State FIPS and Census region is included to assist researchers, it was not entered by the respondents.

3d-1. LH5 Series, Residential History - Start and End Years

For this question, respondents were instructed to write the start and end year for each of their residences before age 50, and to write their age or the decade if they could not remember the exact year. Some respondents recorded consecutive years on each line and the same residence i.e., city and state names, the values appear unchanged in the data.

3d-2. LH5 Series, Residential History - State

Missing state values were imputed using the following correction scheme:

1. A valid zip code was provided
2. Review address components for state information
3. Examine scanned questionnaire

State code 'ZZ' denotes a foreign country and/or broad responses such as "Pacific theatre WWII" and "Overseas."

3e. LH5 Series, Residential History – Updates v2

State values were corrected by verifying uncertain entries against questionnaire scans. Discrepancies between state codes and ZIP codes were identified and resolved to enhance consistency. A total of 2,979 records lacking both a start and end year or containing invalid geographic information were removed to improve data clarity. This resulted in the exclusion of 137 respondents from Version 1. Additionally, the review of questionnaires led to the discovery and inclusion of 237 previously missing records in the dataset.

To eliminate redundancy, records with repeating information were collapsed. For example:

Version 1					
entry	start	end	street	city	state
10	1995	2005		Detroit	MI
11	2006	2012		Detroit	MI
12	2015			Wixom	MI

Version 2					
entry	start	end	street	city	state
10	1995	2012		Detroit	MI
12	2015			Wixom	MI

Researchers should be advised to not use the entry number field to determine the number of residences (or “moves”). This number simply represents on which line the respondent recorded data. The 117 records missing state codes mostly pertain to non-geographically specific military service responses, such as “US Army” and “Navy.”

4. Linking Respondents across Time

Respondent records in the HRS 2015 LHMS Geographic State Level (Version 2.0) can be linked to respondent records from prior waves by HHID and PN. The core sub-household identifiers can be used to link household data with the cross-sectional respondent level data.

5. Obtaining the Data

5a. Access to Restricted Data

Although most HRS data sets are available to the public without restriction, certain HRS data sets contain sensitive respondent information and are only available under terms of a formal agreement negotiated between the researcher and HRS. For instructions on how to proceed, visit the [HRS Restricted Data Web](#) site or contact the HRS Restricted Data Applications Processing Team (hrrdaapplication@umich.edu) by email.

5b. Restricted Data Agreement

This restricted data set is intended for exclusive use by you and the persons (if any) specified in your restricted data agreement.

5c. Publications Based on Restricted Data

Your restricted data agreement specifies that you will inform HRS of any papers, publications, or presentations based on this restricted data set. You may send a bibliographical reference (including a URL link whenever possible) for each item to hrrdaapplication@umich.edu with "Attn: Papers and Publications" in the subject line. If possible, you should also include a PDF-formatted copy of the publication.

As an alternative, you may transmit publications in paper format by postal mail:

Health and Retirement Study
Attn: Papers and Publications
The Institute for Social Research, Room 341
P.O. Box 1248
Ann Arbor, Michigan 48106-1248

6. If You Need to Know More

This document is intended to serve as a brief overview that provides guidelines for using this data product. If you have questions or concerns that are not adequately covered here or on our Web site, or if you have any comments, please contact us. We will do our best to provide answers.

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access public data or to find out more about restricted data products and procedures, visit the [HRS Web site](#). If you need to contact us, you may do so by one of the methods listed below.

Internet: Help Desk at the HRS Web site (<https://hrs.isr.umich.edu/help>)

E-mail: hrrsquestions@umich.edu

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