

Hello, my name is (IWER NAME). I work for the University of Michigan's Survey Research Center. May I speak with NAME?

The University of Michigan is conducting a nationwide study of aging and health. The purpose of the study is to better understand factors that affect people's health and economic well-being as they grow older. You and nearly 9,000 older Americans from all over the country are being invited to participate in this important research, which is funded by the National Institute on Aging (which is part of the National Institutes of Health).

BRANCHPOINT: IF TWO RESPONDENTS IDENTIFIED ON INITIAL HOUSEHOLD COVERSHEET, GO TO 7.1

ONLY ONE RESPONDENT IDENTIFIED ON INITIAL HOUSEHOLD COVERSHEET

5.1. ATTEMPT TO SPEAK WITH R.

R RESIDES IN
HOUSEHOLD

R DECEASED

R INSTITUTIONALIZED
LONG TERM

END CONTACT

END CONTACT

5.2. ASK IF R IS MARRIED OR "LIVING WITH A PARTNER AS IF MARRIED."

R NOT MARRIED

R MARRIED/LIVING WITH PARTNER

GO TO 7.1

5.3. VERIFY AGE-ELIGIBILITY BY ASKING YEAR OF BIRTH.

[IWER: RECORD IN LISTING BOX, 6D]

R IS AGE-ELIGIBLE
BORN 1880 - 1923

R IS INELIGIBLE
BORN 1924 - 1993

END CONTACT

5.4. DECIDE WHETHER R IS ABLE TO BE INTERVIEWED OR NEEDS PROXY

R CAN BE INTERVIEWED

R IS INCAPABLE OF BEING INTERVIEWED

GO TO 6 (LISTING BOX)

TWO RESPONDENTS IDENTIFIED ON INITIAL HOUSEHOLD COVERSHEET

7.1. ATTEMPT TO SPEAK WITH EITHER R AND VERIFY MARITAL/PARTNER STATUS AND RESIDENCE IN HOUSEHOLD UNIT

BOTH Rs IN HOUSEHOLD

SPOUSE DECEASED, SURVIVING R NOT REMARRIED/PARTNERED

SPOUSE DECEASED, SURVIVING R REMARRIED/PARTNERED

BOTH Rs DECEASED

GO TO 7.2

GO TO 5.3

CONSULT SUPERVISOR

END CONTACT

SPOUSE INSTITUTIONALIZED LONG TERM

BOTH Rs INSTITUTIONALIZED LONG TERM

GO TO 5.3

END CONTACT

Rs SEPARATED/DIVORCED, NEITHER REMARRIED/PARTNERED

Rs SEPARATED/DIVORCED, ONE OR BOTH REMARRIED/PARTNERED

CREATE NEW COVERSHEET FOR R WHO LEFT

CREATE NEW COVERSHEET FOR R WHO LEFT

GO TO 5.3

CONSULT SUPERVISOR

FOR R THAT REMAINS IN HOUSEHOLD

7.2. VERIFY AGE-ELIGIBILITY BY ASKING YEAR OF BIRTH.

[IWER: RECORD YEAR FOR EACH R IN THE 'YEAR OF BIRTH' COLUMN, LISTING BOX, 6D]

ONE OR BOTH SPOUSES AGE-ELIGIBLE BORN 1880 - 1923

BOTH SPOUSES INELIGIBLE BOTH BORN 1924 - 1993

END CONTACT

7.3. DECIDE WHETHER Rs ARE ABLE TO BE INTERVIEWED OR NEED PROXY

BOTH Rs ABLE TO BE INTERVIEWED

ONE R INCAPABLE OF BEING INTERVIEWED

NEITHER R IS CAPABLE OF BEING INTERVIEWED

GO TO 6 (LISTING BOX)

7.4 . TWO RESPONDENTS TO BE INTERVIEWED

I would like to interview both you and your (husband/wife/partner). I will be asking some questions about your financial situation and health care costs. Which of you would know more about this, you or your (husband/wife/partner)?

ASSIGN FINANCIAL R:

PERSON NUMBER 010

PERSON NUMBER 020

[THE OTHER R BECOMES THE NON-FINANCIAL R]

6. RESPONDENT LISTING BOX

A PERSON NUMBER	B NAME	C GENDER		D YEAR OF BIRTH	E RESPONDENT TYPE			F IW TYPE		G IW WITH		H MARRIED SPOUSE ABSENT
		M	F		ONLY R	LEAD	SECOND	FINANCIAL	NON-FIN	SELF (R)	PROXY	
010												
020												
030												
040												

INSTRUCTIONS FOR CHECKING COLUMNS IN LISTING BOX, 6, ABOVE

PERSON NUMBER, NAME, GENDER; COLUMNS A, B, C:

PERSON NUMBER 010: The name and gender of the only R thought, prior to contact, to reside in a household previously identified as a One-Respondent Household (5.1), or the name and gender of one of the Rs thought to reside in a household previously identified as a Two-Respondent Household (7.1).

PERSON NUMBER 020: The name and gender of the other R thought to reside in a household previously identified as a Two-Respondent Household (7.1).

PERSON NUMBERS 010 & 020: If an R is deceased or is institutionalized long term (7.1), s/he is ineligible and his/her listing becomes inactive. When Rs in a Two-Respondent Household are separated or divorced (7.1), both may be interviewed, but a new coversheet is made for the R that moved and only the remaining R is active on this coversheet. If either or both of a divorced couple have remarried, or the remaining R whose spouse is deceased has remarried, interviewers are instructed to consult a supervisor. When an R in a household previously identified as a One-Respondent Household is found to be married or living with a partner (5.2), that spouse's/partner's name and gender are recorded as Person Number 020 in the Listing Box; an individual coversheet is also created for this R.

PERSON NUMBERS 030 & 040: These assignments are only used upon instruction by a supervisor.

YEAR OF BIRTH, COLUMN D:

The year of birth is entered for an R born between 1880 & 1923 or for a spouse of an R born between those years (5.3, 7.2), even if the spouse was born later. Where the only R in the household or both married/partnered Rs were born after 1923 the household becomes ineligible.

RESPONDENT TYPE, COLUMN E:

R ONLY: Only one R is identified on the coversheet and R confirms s/he is unmarried (5.2), or two Rs were identified on coversheet and a spouse is deceased (7.1) or they are divorced/separated and neither has remarried (7.1). In the latter case they are considered to have different households; only the remaining R is kept on this coversheet and a new coversheet is created for the R that moved.

LEAD R: The only R in a household(5.2), or the first R to be interviewed in a household (7.4) with two eligible Rs that are married or living as partners (7.1), and one or both Rs are capable of being interviewed (7.3). For a couple, an attempt is made to make the Non-Financial R (7.4) the Lead R. If one R is incapacitated, then the capable spouse is the Lead R (7.3) as well as the Financial R (7.4); when both are incapacitated, someone else does a Proxy Interview for one R as Lead **and** Financial R. The Lead R answers many of the questions about family.

SECOND R: The second R to be interviewed in the household (7.4) with two eligible Rs that are married or living as partners (7.1), and one or both are capable of being interviewed (7.3). If one is incapacitated, s/he is the Second R and someone else does a Proxy Interview for him/her.

IW TYPE, COLUMN F:

FINANCIAL R: The Only R in the household (5.2), or a married/partnered R who knows the most about the couple's financial situation and health care costs (the assignment is made to a Person Number at 7.4). An attempt is made to interview the Financial R as the Second R unless the other spouse is incapacitated (7.3). If both R's are incapacitated, then someone else does a 'Financial' **and** 'Lead' Proxy Interview for one R (7.3).

NON-FINANCIAL R: The R who will not answer financial questions for the couple (7.4), usually the Lead R. If both R's are incapacitated, then someone else does 'Non-Financial' **and** 'Second' Proxy Interview for this R (7.3).

IW WITH, COLUMN G:

SELF: The R does the interview for himself/herself, without a proxy (5.4, 7.3, 7.4).

PROXY: The R is incapacitated and someone else does a Proxy Interview for him/her (5.4, 7.3). When one of a couple is still capable, that R is asked to do the Proxy Interview for the spouse.

MARRIED, SPOUSE ABSENT, COLUMN H:

The classification given to the remaining R when the spouse is institutionalized long term (7.1). The institutionalized spouse is ineligible and becomes inactive in the Listing Box.

LANG. LANGUAGE TO DO THE INTERVIEW

0.ENGLISH
1.SPANISH

P1. ENTER THE SAMPLE ID FROM THE COVERSHEET

SAMPLE ID: _____

P2. ENTER YOUR IWER ID

IWER ID: _____

P3. MARK IF LEAD, 2ND OR ONLY R INTERVIEWED IN HOUSEHOLD UNIT

1.LEAD R
2.SECOND R

3.ONLY R

GO TO P5

P4. MARK IF R IS FINANCIAL OR NON-FINANCIAL R

2.FINANCIAL R
3.NON-FINANCIAL R

P5. CONFIDENTIALITY STATEMENT

This interview is completely confidential and voluntary. If we should come to any question you don't want to answer, just let me know and we will go on to the next question.

[IWER: CHECK TYPE OF "R" IN UPPER LEFT CORNER]

P6. MARK SEX OF R

1.MALE
2.FEMALE

P7. MARK MODE OF INTERVIEW

1.TELEPHONE
2.FACE-TO-FACE

GO TO SECTION A