NOTE ABOUT COLORS:

ALL QUESTION TEXT IN BLACK IS FOR THE CORE INTERVIEW.

ALL QUESTION TEXT IN FUCHSIA IS FOR THE EXIT INTERVIEW. ALSO IN FUCHSIA IS ALL OTHER TEXT THAT IS SPECIFIC TO THE EXIT INTERVIEW BUT NOT TO THE CORE.

OTHERWISE, BLACK TEXT FOR CODEFRAMES, INTERVIEWER INSTRUCTIONS, JUMPS AND BRANCHPOINTS, ETC. CAN APPLY TO BOTH THE CORE AND THE EXIT INTERVIEW UNLESS SPECIFIED OTHERWISE OR THERE IS AN EXIT ALTERNATIVE.

ON A BLACK-AND-WHITE HARD COPY OF THE DOCUMENT, THE FUCHSIA TEXT WILL APPEAR SOMewhat LIGHTER THAN THE ORIGINAL BLACK.

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.
MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A REINTERVIEW R (Z076=1);
THIS IS A NEW SPOUSE/PARTNER OF A REINTERVIEW R (Z076=0);
THIS IS A NEVER INTERVIEWED R or NEW INTERVIEW R (Z076=5)

THIS IS A SELF INTERVIEW (A009=1);
PROXY INTERVIEW (A009={2 or 3}) or (A009 NOT 1);
PROXIED RESPONDENT (A009 NOT 1)

R’s LAST IW MONTH (per Z092), YEAR (per 2093)
R’s AGE (per A019)
R’s FIRST NAME (per X058)

PROXIED R IS AVAILABLE TO ASK ABOUT SOCIAL SECURITY NUMBER (W305=1)

-------------------------------

ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS (D190=0):
{D190 = (A504_CurrWaveNdx - 6) MOD 2} = 0};
I.e., When subtracting the Indices (per A504) for Beginning Wave (Index XX1 for YrXXXX) from Current Wave (Index 8 for 2006), and the result is divided by the Wave Interval of XX2, the Integer Result leaves No Remainder

ALTERNATE WAVE VARIABLE IS NOT SET TO ASK QUESTIONS (D190>0):
{D190 = {(A504_CurrWaveNdx - 6) MOD 2} > 0};
I.e., Integer Result yields a Remainder

** IN 2010 THIS ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS **
-------------------------------

* A variable fieldname and code reference is shown at its first occurrence in the questionnaire, but in some cases, especially when it is common, is not shown after that.

**************************************************************************
D001 BRANCHPOINT: IF THIS IS A SELF INTERVIEW (A009=1), GO TO D101 (AFTER D006)

IF THIS IS AN EXIT INTERVIEW (A007=5) or A LIVING PROXY INTERVIEW (A009={2 or 3}) and LIVING PROXY HAS NOT YET BEEN ASKED QUESTIONS IN SECTION D), GO TO D501 (AFTER D171/(Tag#=D173) (D ASSIST) & D501 BRANCHPOINT)

IF THIS IS A LIVING PROXY INTERVIEW (A009={2 or 3}) and LIVING PROXY HAS COMPLETED ENTIRE IW THROUGH SECTION W, JUMP BACK FROM END OF IW TO D001, BELOW, AND ASK PROXIED R D001 THROUGH D171/(Tag#=D173) (D ASSIST)

D001
May I speak to PROXIED RESPONDENT NAME (per X058) and ask just a few questions?

1. R WILL TRY  3. R REFUSED  5. PROXY REFUSED  7. R UNABLE TO PARTICIPATE IN MODULE DUE TO LANGUAGE PROBLEM

GO TO END OF IW

D002
I have a few questions about the activities you are doing and how you like to spend your time.

How often do you watch television — often, sometimes, or never?

1. OFTEN  2. SOMETIMES  3. NEVER  8. DK  9. RF

D003
How often do you visit with family or friends, either in person or on the phone? (Is it often, sometimes or never?)

1. OFTEN  2. SOMETIMES  3. NEVER  8. DK  9. RF

D004
How often do you read books or magazines for pleasure? (Is it often, sometimes, or never?)

1. OFTEN  2. SOMETIMES  3. NEVER  8. DK  9. RF
D005

Of all the activities you do, what is your favorite one?

[ENTER IF NONE]

ACTIVITY

GO TO D101

D006

How often do you do that? Is it often, sometimes, or never?

1. OFTEN  2. SOMETIMES  3. NEVER  8. DK  9. RF

D101

Part of this study is concerned with people's memory, and ability to think about things.

First, how would you rate your memory at the present time? Would you say it is excellent, very good, good, fair or poor?

1. EXCELLENT  2. VERY GOOD  3. GOOD  4. FAIR

5. POOR  8. DK  9. RF

D102

Compared to [R's LAST IW MONTH (per 2092), YEAR (per 2093)/two years ago], would you say your memory is better now, about the same, or worse now than it was then?

1. BETTER  2. SAME  3. WORSE  8. DK  9. RF
I'll read a set of 10 words and ask you to recall as many as you can. We have purposely made the list long so that it will be difficult for anyone to recall all the words — most people recall just a few. Please listen carefully as I read the set of words because I cannot repeat them. When I finish, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

[IWER: PROBE AS NEEDED FOR UNDERSTANDING OF TASK. READ THE ITEMS AT A SLOW, STEADY RATE AS THEY COME UP ON THE SCREEN, APPROXIMATELY ONE WORD EVERY TWO SECONDS.]

[IWER: IF R REFUSES DURING OR AFTER THE PREAMBLE AND BEFORE ANY WORDS ARE READ, ENTER [CTRL-R] AT THIS SCREEN]

1. CONTINUE  9. RF

GO TO D110

NOTE: ONE OF THESE 4 LISTS IS RANDOMLY ASSIGNED TO EACH R AT VARIABLE X011. EACH R IN A HOUSEHOLD IS ASSIGNED A DIFFERENT LIST. ONLY ASSIGNED WORDS ARE DISPLAYED TO THE IWER, ONE WORD APPEARING PER SCREEN. THE IWER READS EACH WORD TO THE R AS IT APPEARS. THE SCREEN AUTOMATICALLY ADVANCES EVERY 2 SECONDS, SO THE IWER DOES NOT PRESS [ENTER] TO SHOW THE NEXT WORD. THE NUMERICAL CODES FOR THE WORDS ARE NOT SHOWN ON THE SCREEN.

[IWER: SELECT CONTINUE AFTER THE LAST WORD]

1. CONTINUE
Now please tell me the words you can recall.

[IWER: PERMIT AS MUCH TIME AS R WISHES — UP TO ABOUT 2 MINUTES]

[IWER: BEGIN TYPING LETTER OF FIRST WORD. IF R DOES NOT RECALL ANY MORE WORDS, TYPE 'Q' TO QUIT AND PRESS [ENTER]]

<table>
<thead>
<tr>
<th>LIST 1</th>
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</tr>
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</tbody>
</table>


IWER: PLEASE INDICATE WHETHER ANY OF THE FOLLOWING PROBLEMS OCCURRED IN RELATION TO WORD RECALL.

[IWER: CHOOSE ALL THAT APPLY]

<table>
<thead>
<tr>
<th>1. R HAD DIFFICULTY HEARING ANY OF THE WORDS</th>
<th>2. INTERRUPTION OCCURRED WHILE YOU WERE READING LIST</th>
<th>3. OTHER PROBLEM (PLEASE SPECIFY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. NO PROBLEMS OCCURRED</td>
<td>8. DK</td>
<td>9. RF</td>
</tr>
</tbody>
</table>

NOTE: THE IWER MAY CHOOSE ANY COMBINATION OF SELECTIONS 1, 2 AND 3, OR CODE 4, 8 OR 9 SINGLY.

IWER: PLEASE INDICATE WHETHER THE R WROTE DOWN ANY OF THE WORDS OR USED SOME KIND OF AID TO RECALL THE WORDS IN THE LIST DURING THE WORD RECALL TEST.

[IWER: CHOOSE THE MOST APPROPRIATE ANSWER]

<table>
<thead>
<tr>
<th>1. R DEFINITELY USED AID</th>
<th>2. SUSPECT THAT R USED AID, BUT NOT CERTAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. NO REASON TO THINK R USED AID</td>
<td>8. DK</td>
</tr>
</tbody>
</table>


D110
IF THIS IS QUESTION D110:
Now think about the past week and the feelings you have experienced. Please tell me if each of the following was true for you much of the time during the past week.

IF THIS IS ONE OF QUESTIONS D111 – D118:
(Now think about the past week and the feelings you have experienced. Please tell me if each of the following was true for you much of the time during the past week.)

<table>
<thead>
<tr>
<th></th>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>D110</td>
<td><strong>Much of the time during the past week, you felt depressed. Would you say yes or no?</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D111</td>
<td><strong>Much of the time during the past week, You felt that everything you did was an effort. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>D112</td>
<td><strong>(Much of the time during the past week...) Your sleep was restless. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D113</td>
<td><strong>(Much of the time during the past week...) You were happy. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D114</td>
<td><strong>(Much of the time during the past week...) You felt lonely. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D115</td>
<td><strong>(Much of the time during the past week...) You enjoyed life. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D116</td>
<td><strong>(Much of the time during the past week...) You felt sad. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D117</td>
<td><strong>(Much of the time during the past week...) You could not get going. (Would you say yes or no?)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
D118

(Much of the time during the past week...)
You had a lot of energy.
(Would you say yes or no?)

D120

For this next question, please try to count backward as quickly as you can from the number I will give you. I will tell you when to stop.

[IWER: ALLOW R TO START OVER IF S/HE WISHES TO DO SO]
[IWER: PRESS [ENTER] TO CONTINUE AS SOON AS YOU READ THE NUMBER]

Please start with: 20

1. [enter]   8. DK   9. RF

D122

[IWER: PRESS [ENTER] TO CONTINUE AS SOON AS R HAS COUNTED 10 NUMBERS, OR STOPS, OR ASKS TO START OVER]
[IWER: CORRECT RESPONSES INCLUDE COUNTING DOWN FROM 19 TO 10 OR FROM 20 TO 11]

1. [enter]   8. DK   9. RF

D124

You may stop now. Thank you.

[IWER: CODE CORRECT IF R COUNTED BACKWARDS FROM 19 TO 10 OR FROM 20 TO 11 WITHOUT ERROR]
[IWER: USE [CTRL-R] IF R REFUSED TO TRY THE TASK]

1. CORRECT   5. INCORRECT   6. WANTS TO START OVER   RF

GO TO D130

GO TO D130

NOTE: THE IWER MUST SELECT ONE OF THE ABOVE CHOICES. "DON'T KNOW/DK" IS NOT ACCEPTABLE.

D125

Let's try again.

[IWER: PRESS [ENTER] AS SOON AS YOU READ THE NUMBER]

The number to count backward from is: 20

1. [enter]   8. DK   9. RF

D127

[IWER: PRESS [ENTER] AS SOON AS R HAS COUNTED 10 NUMBERS OR STOPS]
You may stop now. Thank you.

[IWER: CODE CORRECT IF R COUNTED BACKWARDS FROM 19 TO 10 OR FROM 20 TO 11 WITHOUT ERROR]

[IWER: USE [CTRL-R] IF R REFUSED TO TRY THE TASK]

1. CORRECT  5. INCORRECT  RF

NOTE: THE IWER MUST SELECT ONE OF THE ABOVE CHOICES. "DON'T KNOW/DK" IS NOT ACCEPTABLE.

Now please try counting backward from a different number. Remember to count as quickly as you can from the number I mention.

[IWER: ALLOW R TO START OVER IF S/HE WISHES TO DO SO]

[IWER: PRESS [ENTER] TO CONTINUE AS SOON AS YOU READ THE NUMBER]

Please start with: 86

1. CONTINUE  DK  RF  NO ENTRY

[PRESS [ENTER] TO CONTINUE AS SOON AS R HAS COUNTED 10 NUMBERS, OR STOPS, OR ASKS TO START OVER.]

[IWER: R CAN CORRECTLY COUNT DOWN FROM 86 TO 77 OR FROM 85 TO 76.]
D134
You may stop now. Thank you.

[IWER: CODE CORRECT IF R COUNTED BACKWARDS FROM 85 TO 76 OR FROM 86 TO 77 WITHOUT ERROR]

[IWER: USE [CTRL-R] IF R REFUSED TO TRY THE TASK]

[IWER: ALLOW R TO START OVER IF S/HE WISHES TO DO SO]

1. CORRECT  5. INCORRECT  6. WANTS TO START OVER  8. DK  9. RF

GO TO D142

D135
Let's try again.

[IWER: PRESS [ENTER] AS SOON AS YOU READ THE NUMBER]

The number to count backward from is: 86

1. CONTINUE  DK  RF

D137

[IWER: PRESS [ENTER] AS SOON AS R HAS COUNTED 10 NUMBERS OR STOPS]

1. CONTINUE  DK  RF

D139
You may stop now. Thank you.

[IWER: CODE CORRECT IF R COUNTED BACKWARDS FROM 85 TO 76 OR FROM 86 TO 77 WITHOUT ERROR]

[IWER: USE [CTRL-R] IF R REFUSED TO TRY THE TASK]

1. CORRECT  5. INCORRECT  RF

NOTE: THE IWER MUST SELECT ONE OF THE ABOVE CHOICES. "DON'T KNOW/DK" IS NOT ACCEPTABLE.
Now let's try some subtraction of numbers.

One hundred minus 7 equals what?

[IWER: IF R ADDS 7 INSTEAD, YOU MAY REPEAT QUESTION]

Answer

Go to D148

Branchpoint

And 7 from that

[IWER: THIS IS THE SECOND SUBTRACTION]

Answer

Go to D189

And 7 from that

[IWER: THIS IS THE THIRD SUBTRACTION]

Answer

Go to D189

And 7 from that

[IWER: THIS IS THE FOURTH SUBTRACTION]

Answer

Go to D189

And 7 from that

[IWER: THIS IS THE FIFTH SUBTRACTION]

Answer

IWER: PLEASE INDICATE WHETHER THE R USED PAPER AND PEN/PENCIL OR ANY OTHER AIDS WHEN COMPLETING THE NUMBER SUBTRACTION.
[IWER: CHOOSE THE MOST APPROPRIATE ANSWER]

1. R DEFINITELY USED AID
2. SUSPECT THAT R USED AID, BUT NOT CERTAIN
3. NO REASON TO THINK R USED AID
8. DK
9. RF

D148 BRANCHPOINT: IF R REFUSED WORD LISTS (D103=13) or (D182=13, EQUIVALENT TO D106=13)) or R DID NOT REMEMBER ANY WORDS (D182=12, EQUIVALENT TO D106=12), GO TO D150
A little while ago, I read you a list of words and you repeated the ones you could remember. Please tell me any of the words that you remember now.

[IWER: PERMIT AS MUCH TIME AS R WISHES — UP TO 2 MINUTES]

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D150

We're interested in how memory actually works. We find that even people with very good memories seem to forget some things from time to time. The next questions are a little different, but are often asked on studies about memory.

[IWER: DO NOT PROBE DK/RF IN SECTION D (COGNITION)]

1. CONTINUE  8. DK  9. RF

D151

Please tell me today's date.

[IWER: PROBE MONTH, DAY, YEAR, DAY OF WEEK]

THE DATE IS:  MONTH/DAY/YEAR
THE DAY IS:  DAY OF WEEK

NOTE: THE DATE AND DAY OF WEEK ARE DISPLAYED FOR THE IWER TO COMPARE WITH R's RESPONSES.

D151  MONTH:

1. MONTH OK  5. MONTH NOT OK  8. DK  9. RF

D152  DAY:

1. DAY OF MONTH OK  5. DAY OF MONTH NOT OK  8. DK  9. RF

D153  YEAR:

1. YEAR OK  5. YEAR NOT OK  8. DK  9. RF

D154

(What is the day of the week?)

DAY OF WEEK:

1. DAY OK  5. DAY NOT OK  8. DK  9. RF

D155

Now I'm going to ask you for the names of some people and things.

What do people usually use to cut paper?

1. SCISSORS OR SHEARS ONLY  5. NOT CORRECT  8. DK  9. RF
D156
What do you call the kind of prickly plant that grows in the desert?

1. CACTUS OR NAME OF KIND OF CACTUS  5. NOT CORRECT  8. DK  9. RF

D157
Who is the President of the United States right now?

[IWER: ANSWER IS OBAMA]
[IWER: PROBE FOR LAST NAME]

1. LAST NAME CORRECT  5. NOT CORRECT  8. DK  9. RF

D158
Who is the Vice President?

[IWER: ANSWER IS BIDEN]
[IWER: PROBE FOR LAST NAME]

1. LAST NAME CORRECT  5. NOT CORRECT  8. DK  9. RF

D159 BRANCHPOINT: IF THIS IS A REINTERVIEW R and ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (D190>0), GO TO D172/(Tag#=D171)

NOTE: QUESTIONS D159 THROUGH D180 (Tag#=D169.3) ARE ALWAYS ASKED OF NEW INTERVIEW Rs. THEY ARE ASKED OF REINTERVIEW Rs ONLY IN ALTERNATIVE WAVES. THEY WERE NOT ASKED OF REINTERVIEW Rs IN THE 2004 WAVE, BUT WERE ASKED IN 2002 AND ARE ASKED AGAIN IN 2006. NOT ASKED IN 2008 AND ASKED AGAIN IN 2010.

D159
Now please tell me the meanings of some words I will read to you. Any way you want to define the word is fine.

1. CONTINUE

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

NOTE: SURVEYCRAFT RANDOMLY Assigns TO EACH R (AT X012) VOCABULARY LIST 1 (1ST WORD OF EACH PAIR) or LIST 2 (2ND WORD) IN QUESTIONS D161 – D169. Rs IN SAME HH ARE ASSIGNED DIFFERENT LISTS.

D161
What is the meaning of the word:

[REPAIR/CONCEAL]
D163
(What is the meaning of) the word:
[FABRIC/ENORMOUS]

D165
(What is the meaning of) the word:
[DOMESTIC/PERIMETER]

D167
(What is the meaning of) the word:
[REMORSE/COMPASSION]
D169
(What is the meaning of) the word:

[PLAGIARIZE/AUDACIOUS]

[IWER: IF R DOESN’T KNOW THE ANSWER, TYPE ‘DK’. IF R REFUSES TO ANSWER, TYPE ‘RF’.]

--------------------------
MEANING
--------------------------

For D161 — D169:
*Wechsler Company. Reproduced Adult Intelligence Scale-Revised. Copyright 1981, 1955 by The Psychological Corporation, A Harcourt Assessment, by permission. All rights reserved.

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Description of Retrieval Fluency test:

The purpose of this module was to broaden the content domain currently assessed in the HRS to include "fluid intelligence." The specific purpose was to see if we could achieve reasonably informative test scores by using a retrieval fluency task adapted from the Woodcock Johnson III test battery. Respondents were given a category (animals) and asked to name as many items in that category that they could think of within a 60-second time frame. Interviewers counted everything the respondent said, even if the answer was incorrect or a repeat response (i.e., said the same item twice), but the interviewers were asked to keep track of incorrect or repeated answers. Variables include the total number of items mentioned for each category, as well as indications of whether the interviewer may have recorded any incorrect items named, and if so, how many. Due to copyright restrictions, the exact question wording is not printed here.

D178  (Tag#=D169.1)
Next I would like to ask you some questions which assess how people use numbers in everyday life.

If the chance of getting a disease is 10 percent, how many people out of 1,000 would be expected to get the disease?

[IWER: ENTER RESPONSE IN WHOLE NUMBERS]

NUMBER OF PEOPLE

D179  (Tag#=D169.2)
If 5 people all have the winning numbers in the lottery and the prize is two million dollars, how much will each of them get?

[IWER: ENTER AMOUNT IN WHOLE DOLLARS]

AMOUNT

D180  (Tag#=D169.3) BRANCHPOINT: IF R GAVE INCORRECT ANSWERS (AT D178 (D178 NOT 100) and AT D179 (D179 NOT 400,000)), CALCULATE TICS SCORE AT D170 AND GO TO D172 (Tag#=D171) BRANCHPOINT

Let’s say you have $200 in a savings account. The account earns 10 percent interest per year. How much would you have in the account at the end of two years.

[IWER: ENTER AMOUNT IN WHOLE DOLLARS]

AMOUNT

D194

Verbal Retrieval Fluency Test of Long-term Retrieval
Source: Adapted from the Woodcock Johnson III Tests of Achievement: Retrieval Fluency © Riverside Publishing. Adapted by McArdle & Woodcock (2009).

Retrieval Fluency measures an aspect of long-term retrieval. This test measures fluency of retrieval from stored knowledge. The Respondent is asked to name as many examples as possible from a given category within a 1-minute time period.

D200

**Number Series Test of Quantitative Reasoning**

Source: Adapted from the Woodcock Johnson III Tests of Achievement: Number Series © Riverside Publishing. Adapted by McArdle & Woodcock (2009).

Number Series measures quantitative reasoning. This ability involves reasoning with concepts that depend upon mathematical relationships. The task requires the Respondent to look at a series of numbers with a number missing from the series. The Respondent must determine the numerical pattern, and then provide the missing number in the series. Each participant was given up to six number series problems to solve.

**NOTE: D170. TICS SCORE COUNT:**

A SCORE IS TABULATED BY SURVEYCRAFT BASED ON RESPONSES TO QUESTIONS D124, D129, & D151 THROUGH D158. A SCORE OF 0-10 IS GIVEN BASED ON THE NUMBER OF CORRECT ANSWERS AND ELAPSED TIME TO ANSWER.

D172/(Tag#=D171) BRANCHPOINT: IF TICS SCORE IS {GREATER THAN OR EQUAL TO 5} (D170 ≥ 5) or R's CURRENT AGE IS LESS THAN 65 (A019<65) or THIS IS NOT A SELF IW (A009 NOT 1), GO TO D171/(Tag#=D173)

(D ASSIST)

D172  (Tag#=D171)
RESPONDENT TICS SCORE IS:  TICS SCORE COUNT (D170)

[IWER: SCORE INDICATES R MAY NEED TO HAVE AN ASSISTANT FOR REMAINDER OF IW]

[IWER: IF YOU SELECT CODE ‘5’, CONTINUE UNASSISTED, PLEASE EXPLAIN ON NEXT SCREEN]

1. R WILL CONTINUE WITH AN ASSISTOR

5. R WILL CONTINUE UNASSISTED

GO TO D171/(Tag#=D173)

(D ASSIST)
D173  (Tag#=D172)
IWER: PLEASE EXPLAIN WHY ASSISTANT IS NOT NEEDED.

NOTE: IWER MUST ENTER SOMETHING AT THIS SCREEN.

D171  (Tag#=D173)
D ASSIST
IWER: HOW OFTEN DID R’s FIRST NAME (per X058) RECEIVE ASSISTANCE WITH ANSWERS IN SECTION D — COGNITIVE?

1. NEVER  2. A FEW TIMES  3. MOST OR ALL OF THE TIME  4. THE SECTION WAS DONE BY A PROXY REPORTER

D501 BRANCHPOINT: IF THIS IS A SELF INTERVIEW (A009=1), GO TO SECTION E
IF THIS IS A PROXIED RESPONDENT (A009 NOT 1), GO TO {(END OF IW)/{INTERVIEWER OBSERVATIONS})

D501
Part of this study is concerned with people's memory, and ability to think about things.

First, how would you rate R’s FIRST NAME’s memory at the present time? Would you say it is excellent, very good, good, fair or poor?

Part of this study is concerned with people’s memory, and ability to think about things. For the next few questions, I want you to think about R’s FIRST NAME as of one month before [his/her] death.

First, how would you rate R’s FIRST NAME’s memory at that time? Would you say it was excellent, very good, good, fair or poor?

1. EXCELLENT  2. VERY GOOD  3. GOOD  4. FAIR
5. POOR  8. DK  9. RF

D502 BRANCHPOINT: IF R’S CURRENT AGE IS {65 OR OLDER} (A019 ≥ 65) or THIS IS AN EXIT INTERVIEW, GO TO D505 BRANCHPOINT
Compared to [R's LAST IW MONTH, YEAR/two years ago], would you say R's FIRST NAME's memory is better now, about the same, or worse now than it was then?

1. BETTER   2. SAME   3. WORSE   DK   RF

D505 BRANCHPOINT: IF R's CURRENT AGE IS LESS THAN 65 YEARS OLD (A019<65), GO TO SECTION E

Now we want you to remember what R's FIRST NAME was like two years ago and to compare it with what [he/she] is like now. Two years ago was in (CURRENT IW YEAR - 2). I will read situations where R's FIRST NAME has to use [his/her] memory or intelligence and we would like you to indicate whether this has improved, stayed the same, or gotten worse in that situation over the past two years.

Note the importance of comparing [his/her] present performance with two years ago. So if two years ago R's FIRST NAME always forgot where [he/she] had left things, and [he/she] still does, then this would be considered 'not much change'.

Now we want you to remember what R's FIRST NAME was like [when we interviewed [him/her] in R's LAST IW MONTH (per 2092), YEAR (per 2093)/two years ago] and to compare it with what [he/she] was like toward the end of [his/her] life, but leaving out the last month or so of [his/her] life. I will read situations where R's FIRST NAME had to use [his/her] memory or intelligence and we would like you to indicate whether this had improved, stayed the same, or gotten worse in that situation over that time period.

Note the importance of comparing [his/her] performance toward the end of [his/her] life with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago]. So if two years ago R's FIRST NAME always forgot where [he/she] had left things, and [he/she] still did, then this would be considered "not much change".

1. CONTINUE   DK   RF
Compared with two years ago, how is R's FIRST NAME at:
Remembering things about family and friends, such as occupations, birthdays, and addresses.
Has this improved, not much changed, or gotten worse?

Compared with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:
Remembering things about family and friends, such as occupations, birthdays, and addresses.
Had this improved, not much changed, or gotten worse?

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE

GO TO D509  GO TO D508

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY  8. DK  9. RF

GO TO D509

D507

Is it much improved or a bit improved?

Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF

GO TO D509

D508

Is it much worse or a bit worse?

Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
Compared with two years ago, how is R's FIRST NAME at:
Remembering things that have happened recently?
(Has this improved, not much changed, or gotten worse?)

Compared with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:
Remembering things that had happened recently?
(Has this improved, not much changed, or gotten worse?)

<table>
<thead>
<tr>
<th>1. IMPROVED</th>
<th>2. NOT MUCH CHANGED</th>
<th>3. GOTTEN WORSE</th>
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GO TO D512

<table>
<thead>
<tr>
<th>4. DOES NOT APPLY; R DOESN'T DO ACTIVITY</th>
<th>8. DK</th>
<th>9. RF</th>
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GO TO D512

Is it much improved or a bit improved?
Was it much improved or a bit improved?

<table>
<thead>
<tr>
<th>1. MUCH IMPROVED</th>
<th>2. A BIT IMPROVED</th>
<th>8. DK</th>
<th>9. RF</th>
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GO TO D512

Is it much worse or a bit worse?
Was it much worse or a bit worse?

<table>
<thead>
<tr>
<th>4. A BIT WORSE</th>
<th>5. MUCH WORSE</th>
<th>8. DK</th>
<th>9. RF</th>
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</table>
(Compared with two years ago, how is R's FIRST NAME at:)
Recalling conversations a few days later?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R's LAST IN MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Recalling conversations a few days later?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE
   GO TO D515  GO TO D514

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY  8. DK  9. RF
   GO TO D515

D513
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF
   GO TO D515

D514
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
D515
(Compared with two years ago, how is R’s FIRST NAME at:)
Remembering [his/her] address and telephone number?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IN MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Remembering [his/her] address and telephone number?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY

GO TO D518

D516
Is it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF

GO TO D518

D517
Is it much worse or a bit worse?

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
D518
(Compared with two years ago, how is R's FIRST NAME at:)
Remembering what day and month it is?
(Has this improved, not much changed, or gotten worse?)
(Compared with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Remembering what day and month it was?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE
GO TO D521  GO TO D520

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY  8. DK  9. RF
GO TO D521

D519
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF
GO TO D521

D520
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
D521
(Compared with two years ago, how is R’s FIRST NAME at:)
Remembering where things are usually kept?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IW MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Remembering where things were usually kept?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED
2. NOT MUCH CHANGED
3. GOTTEN WORSE

GO TO D524
GO TO D523

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY
8. DK
9. RF

GO TO D524

D522
Is it much improved or a bit improved?

Was it much improved or a bit improved?

1. MUCH IMPROVED
2. A BIT IMPROVED
8. DK
9. RF

GO TO D524

D523
Is it much worse or a bit worse?

Was it much worse or a bit worse?

4. A BIT WORSE
5. MUCH WORSE
8. DK
9. RF
D524
(Compared with two years ago, how is R’s FIRST NAME at:)
Remembering where to find things which have been put in a different place than usual?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IN MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Remembering where to find things which had been put in a different place than usual?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE
GO TO D527
GO TO D526

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY
8. DK  9. RF
GO TO D527

D525
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF
GO TO D527

D526
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
(Compared with two years ago, how is R's FIRST NAME at:)
Knowing how to work familiar machines around the house?
(Has this improved, not much changed, or gotten worse?)
(Compared with [when we interviewed [him/her] in R's LAST IN MONTH, YEAR/two years ago], how was R's FIRST NAME at:
Knowing how to work familiar machines around the house?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED
   2. NOT MUCH CHANGED
   3. GOTTEN WORSE

GO TO D530

GO TO D529

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY
   8. DK
   9. RF

GO TO D530

D528
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED
   2. A BIT IMPROVED
   8. DK
   9. RF

GO TO D530

D529
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE
   5. MUCH WORSE
   8. DK
   9. RF
D530
(Compared with two years ago, how is R's FIRST NAME at:)
Learning to use a new gadget or machine around the house?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R's LAST IN MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Learning to use a new gadget or machine around the house?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED    2. NOT MUCH CHANGED    3. GOTTEN WORSE

GO TO D533

GO TO D532

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY    8. DK    9. RF

GO TO D533

D531
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED    2. A BIT IMPROVED    8. DK    9. RF

GO TO D533

D532
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE    5. MUCH WORSE    8. DK    9. RF
D533
(Compared with two years ago, how is R's FIRST NAME at:)
Learning new things in general?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Learning new things in general?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE

GO TO D536  GO TO D535

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY  8. DK  9. RF

GO TO D536

D534
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF

GO TO D536

D535
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
(Compared with two years ago, how is R's FIRST NAME at:)
Following a story in a book or on TV?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Following a story in a book or on TV?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED
2. NOT MUCH CHANGED
3. GOTTEN WORSE

GO TO D539

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY

8. DK
9. RF

GO TO D539

D537
Is it much improved or a bit improved?

Was it much improved or a bit improved?

1. MUCH IMPROVED
2. A BIT IMPROVED
8. DK
9. RF

GO TO D539

D538
Is it much worse or a bit worse?

Was it much worse or a bit worse?

4. A BIT WORSE
5. MUCH WORSE
8. DK
9. RF
D539
(Compared with two years ago, how is R's FIRST NAME at:)
Making decisions on everyday matters?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R's LAST IN MONTH, YEAR/two years ago], how was R's FIRST NAME at:)
Making decisions on everyday matters?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED
2. NOT MUCH CHANGED
3. GOTTEN WORSE

GO TO D542
GO TO D541

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY
8. DK
9. RF

GO TO D542

D540
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED
2. A BIT IMPROVED
8. DK
9. RF

GO TO D542

D541
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE
5. MUCH WORSE
8. DK
9. RF
(Compared with two years ago, how is R's FIRST NAME at:) Handling money for shopping? (Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R's LAST IW MONTH, YEAR/two years ago], how was R's FIRST NAME at:) Handling money for shopping? (Had this improved, not much changed, or gotten worse?)

1. IMPROVED 2. NOT MUCH CHANGED 3. GOTTEN WORSE

GO TO D545

4. DOES NOT APPLY; R DOESN'T DO ACTIVITY 8. DK 9. RF

GO TO D545

D543

Is it much improved or a bit improved?

Was it much improved or a bit improved?

1. MUCH IMPROVED 2. A BIT IMPROVED 8. DK 9. RF

GO TO D545

D544

Is it much worse or a bit worse?

Was it much worse or a bit worse?

4. A BIT WORSE 5. MUCH WORSE 8. DK 9. RF
(Compared with two years ago, how is R’s FIRST NAME at:)
Handling financial matters, that is, [his/her] pension or dealing with the bank?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IW MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Handling financial matters, for example, a pension or dealing with the bank?
(Has this improved, not much changed, or gotten worse?)

1. IMPROVED
2. NOT MUCH CHANGED
3. GOTTEN WORSE

GO TO D548
GO TO D547

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY
8. DK
9. RF

GO TO D548

D546
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED
2. A BIT IMPROVED
8. DK
9. RF

GO TO D548

D547
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE
5. MUCH WORSE
8. DK
9. RF
(Compared with two years ago, how is R’s FIRST NAME at:)
Handling other everyday arithmetic problems, such as, knowing how much food to buy, knowing how long between visits from family or friends?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IW MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Handling other everyday arithmetic problems, such as, knowing how much food to buy, knowing how long between visits from family or friends?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE
GO TO D551  GO TO D550

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY  8. DK  9. RF
GO TO D551

D549
Is it much improved or a bit improved?
Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF
GO TO D551

D550
Is it much worse or a bit worse?
Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
D551

(Compared with two years ago, how is R’s FIRST NAME at:)
Using [his/her] intelligence to understand what’s going on and to reason things through?
(Has this improved, not much changed, or gotten worse?)

(Compared with [when we interviewed [him/her] in R’s LAST IW MONTH, YEAR/two years ago], how was R’s FIRST NAME at:)
Using [his/her] intelligence to understand what was going on and to reason things through?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED  2. NOT MUCH CHANGED  3. GOTTEN WORSE

GO TO D554  GO TO D553

4. DOES NOT APPLY; R DOESN’T DO ACTIVITY  8. DK  9. RF

GO TO D554

D552

Is it much improved or a bit improved?

Was it much improved or a bit improved?

1. MUCH IMPROVED  2. A BIT IMPROVED  8. DK  9. RF

GO TO D554

D553

Is it much worse or a bit worse?

Was it much worse or a bit worse?

4. A BIT WORSE  5. MUCH WORSE  8. DK  9. RF
<table>
<thead>
<tr>
<th></th>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>D554</strong></td>
<td><strong>Now, thinking about some current behaviors, does [he/she] ever get lost in a familiar environment?</strong>&lt;br&gt;<strong>Did [he/she] ever get lost in a familiar environment?</strong></td>
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<tr>
<td><strong>D555</strong></td>
<td><strong>Does [he/she] ever wander off and not return by [himself/herself]?</strong>&lt;br&gt;<strong>Did [he/she] ever wander off and not return by [himself/herself]?</strong></td>
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<tr>
<td><strong>D556</strong></td>
<td><strong>Can [he/she] be left alone for an hour or so?</strong>&lt;br&gt;[Since R's LAST IW MONTH, YEAR/In the last two years] could [he/she] be left alone for an hour or so?**</td>
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<tr>
<td><strong>D557</strong></td>
<td><strong>Does [he/she] ever see or hear things that are not really there?</strong>&lt;br&gt;<strong>Did R's FIRST NAME ever see or hear things that were not really there?</strong></td>
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</tbody>
</table>

**GO TO SECTION E**