
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 Z093)

R's **AGE** (per A019)

R's **FIRST NAME** (per X058)

RANDOM VARIABLE FOR NUMBER SERIES SET A VS. SET B: X525={1 OR 2}

RANDOM VARIABLE FOR VERBAL ANALOGIES SET A VS. SET B: X526={1 OR 2}

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 2016 THIS ALTERNATE WAVE VARIABLE IS SET TO NOT ASK QUESTIONS ****

ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS (D290=0):

{D290 = (A504_CurrWaveNdx - 5) 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 (D290>0):

{D290 = {(A504_CurrWaveNdx - 5) MOD 2} > 0};

I.e., Integer Result yields a Remainder

**** IN 2016 THIS ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS ****

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FINAL PUBLIC VERSION — 8/15/2016

* 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.

D101 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW (A007=5) or {A LIVING PROXY INTERVIEW (A009={2 or 3}), GO TO D501

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 Z092), YEAR (per Z093)/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 |
|-----------|---------|----------|-------|-------|

D103

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 |

HRS 2016 — SECTION D: COGNITION — PAGE 5

FINAL PUBLIC VERSION — 8/15/2016

D104

LIST 1	LIST 2	LIST 3	LIST 4
1. HOTEL	1. SKY	1. WOMAN	1. WATER
2. RIVER	2. OCEAN	2. ROCK	2. CHURCH
3. TREE	3. FLAG	3. BLOOD	3. DOCTOR
4. SKIN	4. DOLLAR	4. CORNER	4. PALACE
5. GOLD	5. WIFE	5. SHOES	5. FIRE
6. MARKET	6. MACHINE	6. LETTER	6. GARDEN
7. PAPER	7. HOME	7. GIRL	7. SEA
8. CHILD	8. EARTH	8. HOUSE	8. VILLAGE
9. KING	9. COLLEGE	9. VALLEY	9. BABY
10. BOOK	10. BUTTER	10. ENGINE	10. TABLE

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

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FINAL PUBLIC VERSION — 8/15/2016

D106

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]]

LIST 1	LIST 2	LIST 3	LIST 4
1. HOTEL	1. SKY	1. WOMAN	1. WATER
2. RIVER	2. OCEAN	2. ROCK	2. CHURCH
3. TREE	3. FLAG	3. BLOOD	3. DOCTOR
4. SKIN	4. DOLLAR	4. CORNER	4. PALACE
5. GOLD	5. WIFE	5. SHOES	5. FIRE
6. MARKET	6. MACHINE	6. LETTER	6. GARDEN
7. PAPER	7. HOME	7. GIRL	7. SEA
8. CHILD	8. EARTH	8. HOUSE	8. VILLAGE
9. KING	9. COLLEGE	9. VALLEY	9. BABY
10. BOOK	10. BUTTER	10. ENGINE	10. TABLE

11. X-WRONG WORD	12. Y-NONE REMEMBERED	13. U-REFUSED	QUIT
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NOTE: THE IWER SEES THE LIST PREVIOUSLY PRESENTED TO THE R, PLUS THE OPTIONS SHOWN BELOW IT. THE NUMERICAL CODES SHOWN HERE FOR THE ITEMS ABOVE ARE NOT SEEN ON THE SCREEN. TO ENTER THE R'S RESPONSES, THE IWER TYPES THE FIRST LETTER OF EACH CORRECT WORD THE R GIVES. EVERY TIME THE R SAYS A WORD NOT ON THE LIST, THE IWER SELECTS "X-WRONG WORD" WHICH APPEARS AS "11" IN DATA OUTPUT. IF THE R CANNOT REMEMBER ANY WORDS, THE IWER SELECTS "Y-NONE REMEMBERED" WHICH APPEARS AS "12" FOR THE DATA OUTPUT VARIABLE (D183). THE IWER SELECTS "U-REFUSED" IF THE R AT THIS POINT WILL NOT TRY TO REMEMBER AND "13" APPEARS IN DATA OUTPUT. WHEN THE R FINISHES THE IWER MUST SELECT "QUIT" TO MOVE TO THE NEXT QUESTION. AT THE END OF THE ENTRIES A CALCULATION IS MADE OF THE NUMBER OF WORDS THAT WERE REMEMBERED CORRECTLY (# GOOD), THE NUMBER OF WRONG WORDS SAID (# WRONG), THE NUMBER FORGOTTEN [# FORGOTTEN (=TOTAL WORDS - # GOOD)].

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FINAL PUBLIC VERSION — 8/15/2016

D108

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

[IWER: CHOOSE ALL THAT APPLY]

1. R HAD DIFFICULTY
HEARING ANY OF THE
WORDS

2. INTERRUPTION OCCURRED
WHILE YOU WERE READING
LIST

3. OTHER PROBLEM
(PLEASE SPECIFY)

D109
PLEASE SPECIFY
OTHER PROBLEM

4. NO PROBLEMS OCCURRED

8. DK

9. RF

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

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FINAL PUBLIC VERSION — 8/15/2016

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 - D117:

(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.)

	1. YES	5. NO	8. DK	9. RF
D110 Much of the time during the past week, you felt depressed. Would you say yes or no?				
D111 Much of the time during the past week, You felt that everything you did was an effort. (Would you say yes or no?)				
D112 (Much of the time during the past week...) Your sleep was restless. (Would you say yes or no?)				
D113 (Much of the time during the past week...) You were happy. (Would you say yes or no?)				
D114 (Much of the time during the past week...) You felt lonely. (Would you say yes or no?)				
D115 (Much of the time during the past week...) You enjoyed life. (Would you say yes or no?)				

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FINAL PUBLIC VERSION — 8/15/2016

D116 (Much of the time during the past week...) You felt sad. (Would you say yes or no?)				
D117 (Much of the time during the past week...) You could not get going. (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
GO TO D142		

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
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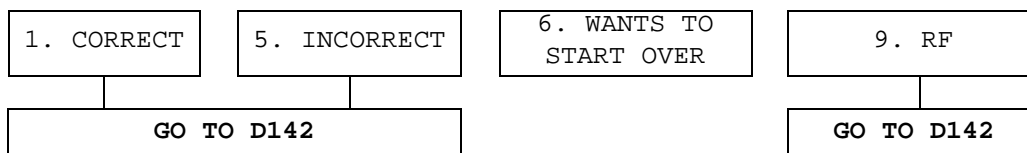
D124

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]

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



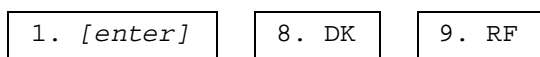
NOTE: THE IWER MUST SELECT ONE OF THE ABOVE CHOICES. "DON'T KNOW/DK" IS NOT ACCEPTABLE.

D125

Let's try again.

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

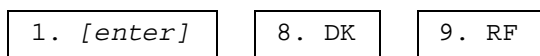
The number to count backward from is: 20



D127

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

[IWER: CORRECT RESPONSES INCLUDE COUNTING DOWN FROM 19 TO 10 OR FROM 20 TO 11]

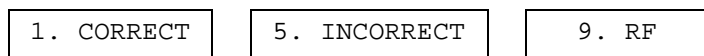


D129

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]



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

D142

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

DK	RF
GO TO D148 BRANCHPOINT	

D143

And 7 from that

[IWER: THIS IS THE SECOND SUBTRACTION]

ANSWER

DK	RF
GO TO D189	

D144

And 7 from that

[IWER: THIS IS THE THIRD SUBTRACTION]

ANSWER

DK	RF
GO TO D189	

D145

And 7 from that

[IWER: THIS IS THE FOURTH SUBTRACTION]

ANSWER

DK	RF
GO TO D189	

D146

And 7 from that

[IWER: THIS IS THE FIFTH SUBTRACTION]

ANSWER

DK

RF

D189

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=9) or {D182=13, EQUIVALENT TO D106=13}) or R DID NOT REMEMBER ANY WORDS (D182=12, EQUIVALENT TO D106=12), GO TO D150

D148

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]

LIST 1	LIST 2	LIST 3	LIST 4
1. HOTEL	1. SKY	1. WOMAN	1. WATER
2. RIVER	2. OCEAN	2. ROCK	2. CHURCH
3. TREE	3. FLAG	3. BLOOD	3. DOCTOR
4. SKIN	4. DOLLAR	4. CORNER	4. PALACE
5. GOLD	5. WIFE	5. SHOES	5. FIRE
6. MARKET	6. MACHINE	6. LETTER	6. GARDEN
7. PAPER	7. HOME	7. GIRL	7. SEA
8. CHILD	8. EARTH	8. HOUSE	8. VILLAGE
9. KING	9. COLLEGE	9. VALLEY	9. BABY
10. BOOK	10. BUTTER	10. ENGINE	10. TABLE

11. X-WRONG WORD	12. Y-NONE REMEMBERED	13. U-REFUSED	QUIT
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GO TO D150 BRANCHPOINT

NOTE: THE IWER AGAIN SEES THE LIST PREVIOUSLY PRESENTED TO THE R, PLUS THE OPTIONS SHOWN BELOW IT. THE NUMERICAL CODES SHOWN HERE FOR THE ITEMS ABOVE ARE NOT SEEN ON THE SCREEN. TO ENTER THE R'S RESPONSES, THE IWER TYPES THE FIRST LETTER OF EACH CORRECT WORD THE R GIVES. EVERY TIME THE R SAYS A WORD NOT ON THE LIST, THE IWER SELECTS "X-WRONG WORD" WHICH APPEARS AS "11" IN DATA OUTPUT. IF THE R CANNOT REMEMBER ANY WORDS, THE IWER SELECTS "Y-NONE REMEMBERED" WHICH APPEARS AS "12" FOR THE DATA OUTPUT VARIABLE (D183). THE IWER SELECTS "U-REFUSED" IF THE R AT THIS POINT WILL NOT TRY TO REMEMBER AND "13" APPEARS IN DATA OUTPUT. WHEN THE R FINISHES THE IWER MUST SELECT "QUIT" TO MOVE TO THE NEXT QUESTION. AT THE END OF THE ENTRIES A CALCULATION IS MADE OF THE NUMBER OF WORDS THAT WERE REMEMBERED CORRECTLY (# GOOD), THE NUMBER OF WRONG WORDS SAID (# WRONG), THE NUMBER FORGOTTEN [# FORGOTTEN (=TOTAL WORDS - # GOOD)].

D191

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 SINCE THE FIRST (IMMEDIATE RECALL) PORTION OF THE TEST.

[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

D150 BRANCHPOINT: IF R'S CURRENT AGE IS LESS THAN 65 YEARS OLD (A019<65) *and* THIS IS A REINTERVIEW R (Z076=1), GO TO D159 BRANCHPOINT

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
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D152	DAY:	1. DAY OF MONTH OK	5. DAY OF MONTH NOT OK	8. DK	9. RF
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D153	YEAR:	1. YEAR OK	5. YEAR NOT OK	8. DK	9. RF
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D154

(What is the day of the week?)

DAY OF WEEK:	1. DAY OK	5. DAY NOT OK	8. DK	9. RF
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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
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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
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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
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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, GO TO D178 BRANCHPOINT

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]

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

_____ DK

RF

MEANING

D163

(What is the meaning of) the word:

[FABRIC/ENORMOUS]

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

_____ DK

RF

MEANING

D165

(What is the meaning of) the word:

[DOMESTIC/PERIMETER]

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

_____ DK RF
MEANING

D167

(What is the meaning of) the word:

[REMORSE/COMPASSION]

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

_____ DK RF
MEANING

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'.]

_____ DK RF
MEANING

For D161 — D169:

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D178 BRANCHPOINT: IF THIS IS A REINTERVIEW R *and* ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (D190>0), GO TO D194 BRANCHPOINT

NOTE: QUESTIONS D178 THROUGH D180 (Tag#=D169.3) ARE ALWAYS ASKED OF NEW INTERVIEW Rs. THEY WERE ASKED IN 2014 AND WILL BE ASKED AGAIN IN 2018, BUT THEY ARE NOT ASKED OF REINTERVIEW Rs IN THE 2016 WAVE.

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]

DK

RF

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]

DK

RF

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 D194 BRANCHPOINT

D180 (Tag#=D169.3)

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]

DK

RF

AMOUNT

RETRIEVAL FLUENCY TEST (D194/D193-D199)

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.

D194 BRANCHPOINT: IF R'S CURRENT AGE IS LESS THAN 65 YEARS OLD (A019<65) and THIS IS A REINTERVIEW R (Z076=1), GO TO D200 BRANCHPOINT

NOTE: DON'T KNOW/DK AND REFUSE/RF ARE NOT RECORDED FOR RETRIEVAL FLUENCY TEST (D194-D199).

D194

Now I want to see how many different animals you can name.

You will have 60 seconds. When I say, `Begin`, say the animal names as fast as you can.

[IWER: GET READY TO TIME 60 SECONDS. REPEAT INSTRUCTIONS IF NECESSARY]

[IWER: PRESS [ENTER] FOR EVERY RESPONSE AS IT IS SAID BY THE R - REGARDLESS OF WHETHER YOU THINK IT IS CORRECT. KEEP A MENTAL COUNT OF INCORRECT AND REPEATED RESPONSES.

[IWER: START TIMING ENTER [1] AND PRESS [ENTER] AS SOON AS YOU TELL THE R TO BEGIN

Are you ready? (PAUSE.) BEGIN.

1. CONTINUE

D193

IWER: PRESS [ENTER] FOR EVERY RESPONSE AS IT IS SAID BY THE R - REGARDLESS OF WHETHER YOU THINK IT IS CORRECT.

[IWER: KEEP A MENTAL COUNT OF INCORRECT AND REPEATED RESPONSES.]

[IWER: COUNT CATEGORIES OF ANIMALS (E.G., DOG), AS WELL AS SPECIFIC TYPES (E.G., COLLIE, TERRIER) AS CORRECT. IF R IS BILINGUAL, COUNT RESPONSE CORRECT IF GIVEN IN ANOTHER LANGUAGE.]

[IWER: IF R HAS NOT MENTIONED ANY ANIMALS FOR ABOUT 10 SECONDS, PROBE: `ANYTHING ELSE?`]

[IWER: IF NO, PRESS '7' TO END TASK.]

[IWER: INSTRUCT THE R TO STOP AS SOON AS THE TIMER REACHES 60 SECONDS. THEN PRESS '7' TO END TASK."]

7. END TASK

D196

TOTAL ANIMAL ANSWERS

NOTE: THIS IS CALCULATED IN BLAISE BY COUNTING THE NUMBER OF TIMES THE IWER PRESSES 'ENTER' AT D194.

D197 BRANCHPOINT: IF R DID NOT RESPOND WITH ANY ANIMAL ANSWERS (D196=EMPTY), GO TO D200 BRANCHPOINT

D197

IWER: DID YOU RECORD ANY INCORRECT NAMES?

1. YES

2. PROBABLY YES

4. PROBABLY NO

5. NO

GO TO
D199

D198

IWER: WHAT IS YOUR BEST ESTIMATE OF THE NUMBER OF INCORRECT NAMES YOU RECORDED?

NUMBER OF INCORRECT NAMES

D199

IWER: WHAT DID YOU USE TO TIME THIS TASK?

1. STOP WATCH	2. COMPUTER CLOCK	3. WRIST WATCH
4. WALL CLOCK	5. NOTHING	7. OTHER

D245

IWER: PLEASE INDICATE WHETHER ANY PROBLEMS OCCURRED IN RELATION TO ANIMAL NAMING.

[IWER: CHOOSE ALL THAT APPLY]

[IWER: R ENDING BEFORE 60 SECONDS EXPIRED IS NOT A PROBLEM AND NEED NOT BE REPORTED]

1. INTERRUPTION DURING 60 SEC RESPONSE PERIOD	2. IWER EXCEEDED 60 SECOND RESPONSE PERIOD	
3. TECHNICAL PROBLEM WITH COMPUTER OR TIMING EQUIPMENT	4. R DID NOT UNDERSTAND TASK	
5. OTHER (SPECIFY) D246 (SPECIFY)_____		
6. NO PROBLEMS OCCURRED	8. DK	9. RF

NOTE: THE IWER MAY CHOOSE ANY COMBINATION OF SELECTIONS 1, 2, 3, 4, AND 5, OR CODE 6, 8 OR 9 SINGLY.

*****Proprietary Test*****

NUMBER SERIES TEST OF QUANTITATIVE REASONING (D200-D235)

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 is given up to six number series problems to solve.

For details on the individual test items, see Fisher et al., "New Measures of Fluid Intelligence in the HRS", HRS Documentation Report DR-027, at this link: <http://hrsonline.isr.umich.edu/sitedocs/userg/dr-027.pdf>

D200 BRANCHPOINT: IF THIS IS NOT A SELF INTERVIEW (A009 NOT 1), GO TO D171 (D ASSIST) IF ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (D290>0), GO TO D247 BRANCHPOINT
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NOTE: STARTING IN 2014, WE BEGAN ALTERNATING BETWEEN ADMINISTERING THE VERBAL ANALOGIES TEST FOR ALL RS AND ASKING NUMBER SERIES FOR ALL RS ACROSS WAVES. QUESTIONS D200 THROUGH D242 WERE NOT ASKED IN 2014, BUT ARE ASKED IN 2016 AND AGAIN IN 2020.

D200

Next I'm going to read you several numbers and I'd like you to write them down from left to right.

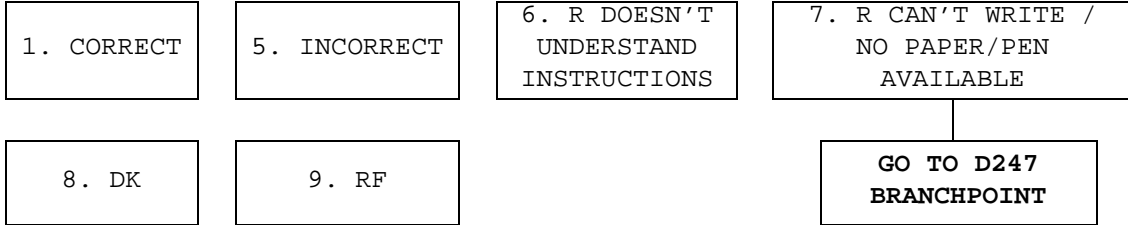
[IWER: MAKE SURE R HAS PENCIL AND PAPER READY FOR WRITING DOWN THE NUMBERS. REPEAT INSTRUCTIONS FOR THE R IF NECESSARY. ALLOW ENOUGH TIME WHEN READING NUMBERS FOR R TO WRITE DOWN SEQUENCE.]

There will be a blank number in the series that I read to you. Draw a dash or short blank line when I say "blank." Then look at the pattern of numbers. Based on this pattern, tell me what number goes in the blank. Sometimes the blank will be at the end of the series, and sometimes the blank will be in the beginning or in the middle.

For example, if I said the numbers '1. . . 2. . . BLANK. . .4' then what number would go in the blank? CORRECT RESPONSE: 3

[IWER: IF R DOES NOT GIVE THE CORRECT RESPONSE (3) THEN SAY: The answer we were looking for is 3. (PROBE IF NEEDED TO CHECK THAT THE RESPONDENT UNDERSTANDS THE TASK, BY ASKING: Do you understand the directions for this task?)]

[IWER: IF THE RESPONDENT SAYS HE OR SHE DOES NOT KNOW THE ANSWER, RECORD CTRL-D. DO NOT RECORD A "DON'T KNOW" RESPONSE AS "R DOESN'T UNDERSTAND INSTRUCTIONS."]



D240

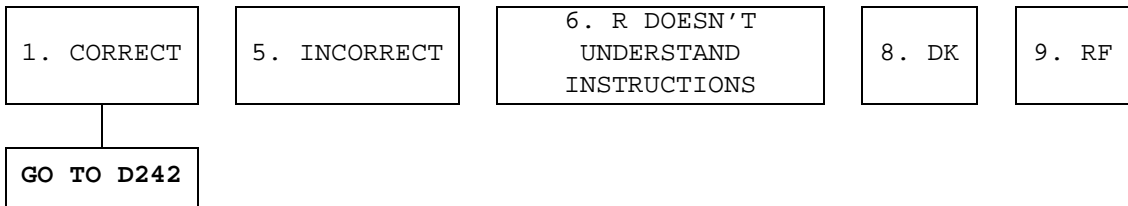
Let's try another one. I'm going to read you a series of numbers. There will be a blank number in the series that I read to you. I would like you to write down the numbers from left to right and then tell me what number goes in the blank based on the pattern of numbers.

2. . . 4. . . 6. . .BLANK

(Now please look at the number you just wrote down and tell me the number that goes in the blank.)

CORRECT RESPONSE: 8

[IWER: IF THE RESPONDENT SAYS HE OR SHE DOES NOT KNOW THE ANSWER, RECORD CTRL-D. DO NOT RECORD A "DON'T KNOW" RESPONSE AS "R DOESN'T UNDERSTAND INSTRUCTIONS."]

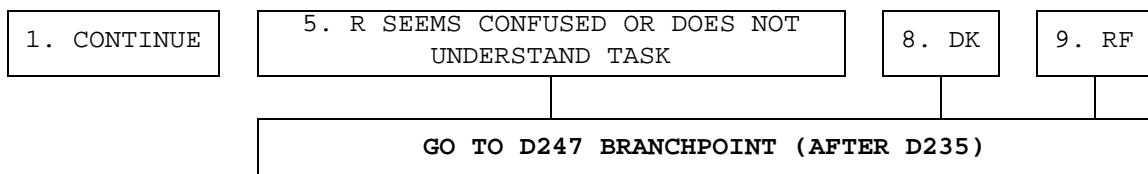


D241

[IWER: The sequence is 2 4 6 8.

8 is the answer we were looking for because, in this example, the numbers increase by 2.]

[IWER: PROBE IF NEEDED TO CHECK THAT THE R UNDERSTANDS THE TASK, BY ASKING: DO YOU UNDERSTAND THE DIRECTIONS FOR THIS TASK?]

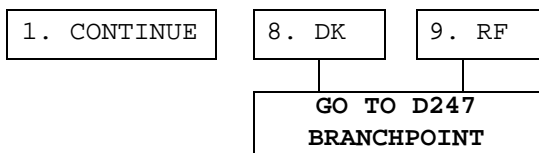


D242

I am now going to ask you six more questions like the one you just did. Sometimes the blank will be at the end of the series, and sometimes it may be at the beginning or in the middle. You may be asked a question with more than one blank in the sequence. The numbers might increase, like 2, 4, 6, or decrease, like 6, 4, 2. Some of the problems may be easy but others may be hard. Just do the best you can. It is more important to answer the item correctly than to answer quickly, so take a little time to think before answering. It is okay if you do not know the answer because some of the items are intended to be very difficult. You can go on to the next item at any time. Are you ready to begin?

[IWER: MAKE SURE R HAS PENCIL AND PAPER READY FOR WRITING DOWN THE NUMBERS. REPEAT INSTRUCTIONS FOR THE R IF NECESSARY.]

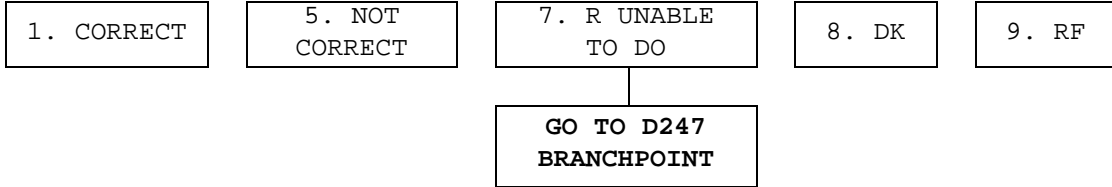
[IWER: PERMIT AS MUCH TIME AS R WISHES FOR EACH QUESTION. IF THE R HAS NOT GIVEN AN ANSWER AFTER ABOUT A MINUTE, ASK: Would you just like to go on to the next question?]



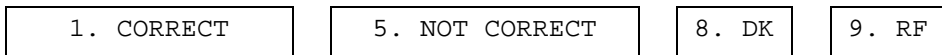
D201 BRANCHPOINT: IF R WAS RANDOMLY SELECTED TO BE ASKED SET 2 OF NUMBER SERIES QUESTIONS (X525=2), GO TO D221

D201 NUMBER SERIES ITEM G1

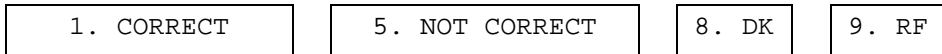
[IWER: IF THE RESPONDENT SAYS HE OR SHE DOES NOT KNOW THE ANSWER, RECORD CTRL-D. DO NOT RECORD A "DON'T KNOW" RESPONSE AS "UNABLE TO DO."]



D202 NUMBER SERIES ITEM H1



D203 NUMBER SERIES ITEM I1



D216

COUNT SCORE FOR NUMBER CORRECT
(SUM OF NUMBER CORRECT {D201+D202+D203})

NUMBER OF ITEMS CORRECT

D217

COUNT SCORE FOR NUMBER REFUSED
(SUM OF NUMBER REFUSED {D201+D202+D203})

NUMBER OF ITEMS REFUSED

D204 BRANCHPOINT: IF R REFUSED ALL OF THE FIRST THREE NUMBER SERIES ITEMS (D217=3), GO TO D247 BRANCHPOINT

IF R ANSWERED NONE OF THE NUMBER SERIES ITEMS CORRECTLY (D216=0), CONTINUE ON TO D204

IF R ANSWERED ONE NUMBER SERIES QUESTION CORRECTLY (SUM OF {D201+D202+D203}=1)(D216=1), GO TO D207

IF R ANSWERED TWO NUMBER SERIES QUESTIONS CORRECTLY (D216=2), GO TO D210

IF R ANSWERED THREE NUMBER SERIES QUESTIONS CORRECTLY (D216=3), GO TO D213

D204 NUMBER SERIES ITEM A1

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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D205 NUMBER SERIES ITEM B1

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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D206 NUMBER SERIES ITEM C1

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
GO TO D247 BRANCHPOINT (AFTER D235)			

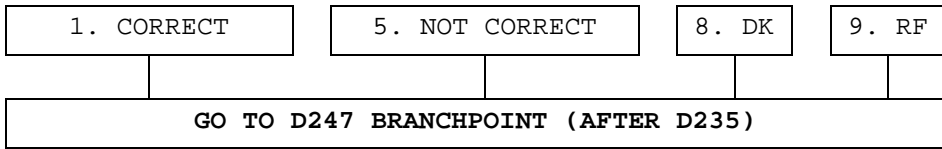
D207 NUMBER SERIES ITEM D1

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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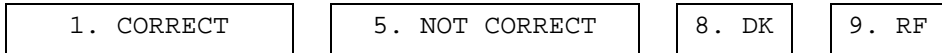
D208 NUMBER SERIES ITEM E1

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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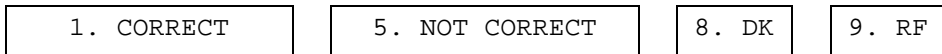
D209 NUMBER SERIES ITEM F1



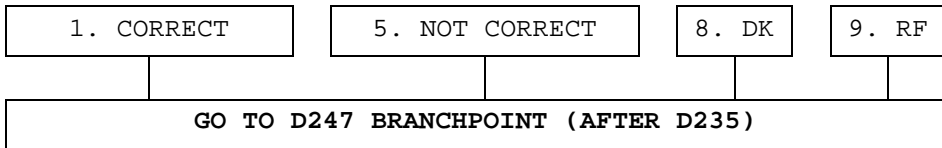
D210 NUMBER SERIES ITEM J1



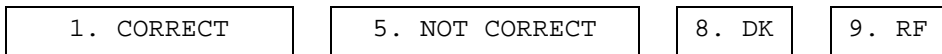
D211 NUMBER SERIES ITEM K1



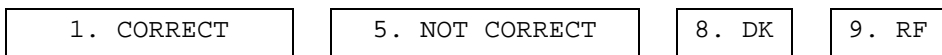
D212 NUMBER SERIES ITEM L1



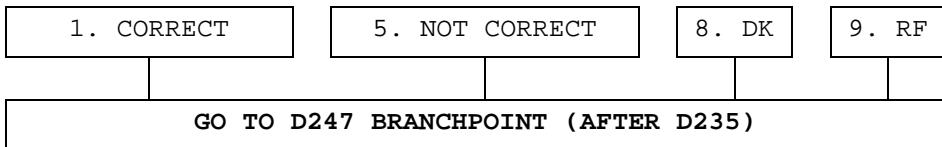
D213 NUMBER SERIES ITEM M1



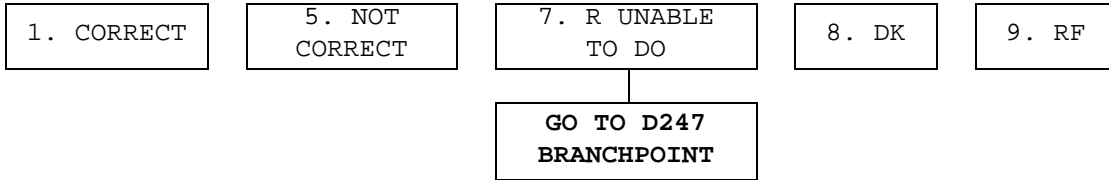
D214 NUMBER SERIES ITEM N1



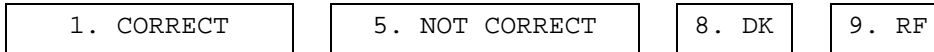
D215 NUMBER SERIES ITEM O1



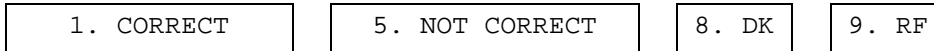
D221 NUMBER SERIES ITEM G2



D222 NUMBER SERIES ITEM H2



D223 NUMBER SERIES ITEM I2



D216

COUNT SCORE FOR NUMBER CORRECT
(SUM OF NUMBER CORRECT {D221+D222+D223})

NUMBER OF ITEMS CORRECT

D217

COUNT SCORE FOR NUMBER REFUSED
(SUM OF NUMBER REFUSED {D221+D222+D223})

NUMBER OF ITEMS REFUSED

D224 BRANCHPOINT: IF R REFUSED ALL OF THE FIRST THREE NUMBER SERIES ITEMS (D217=3), GO TO D247 BRANCHPOINT

IF R ANSWERED NONE OF THE NUMBER SERIES ITEMS CORRECTLY (D216=0), CONTINUE ON TO D224

IF R ANSWERED ONE NUMBER SERIES QUESTION CORRECTLY (SUM OF {D221+D222+D223}=1) (D216=1), GO TO D227

IF R ANSWERED TWO NUMBER SERIES QUESTIONS CORRECTLY (D216=2), GO TO D230

IF R ANSWERED THREE NUMBER SERIES QUESTIONS CORRECTLY (D216=3), GO TO D233

D224 NUMBER SERIES ITEM A2

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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D225 NUMBER SERIES ITEM B2

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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D226 NUMBER SERIES ITEM C2

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
GO TO D247 BRANCHPOINT (AFTER D235)			

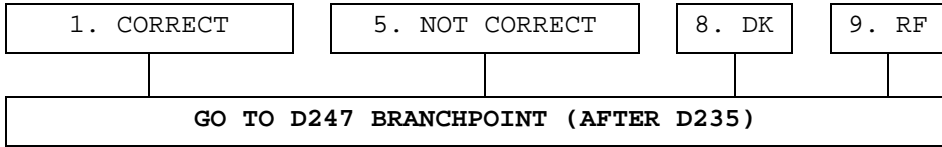
D227 NUMBER SERIES ITEM D2

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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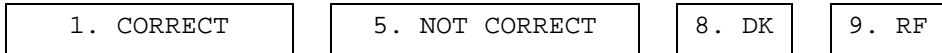
D228 NUMBER SERIES ITEM E2

1. CORRECT	5. NOT CORRECT	8. DK	9. RF
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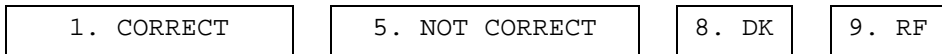
D229 NUMBER SERIES ITEM F2



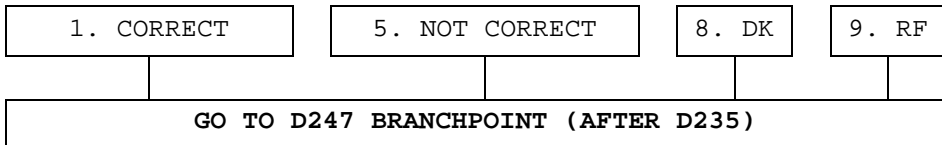
D230 NUMBER SERIES ITEM J2



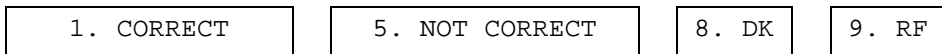
D231 NUMBER SERIES ITEM K2



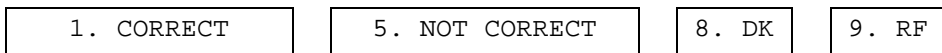
D232 NUMBER SERIES ITEM L2



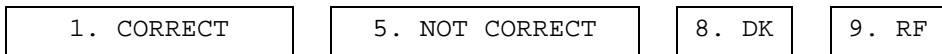
D233 NUMBER SERIES ITEM M2



D234 NUMBER SERIES ITEM N2



D235 NUMBER SERIES ITEM O2



***** Proprietary Test*****

Verbal Analogies Test (D247-D284)

For details on the individual test items, see Fisher et al., "New Measures of Fluid Intelligence in the HRS", HRS Documentation Report DR-027, at this link: <http://hrsonline.isr.umich.edu/sitedocs/userg/dr-027.pdf>

D247 BRANCHPOINT: IF ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (D190>0), GO TO D172 BRANCHPOINT

NOTE: STARTING IN 2014, WE BEGAN ALTERNATING BETWEEN ADMINISTERING THE VERBAL ANALOGIES TEST FOR ALL RS AND ASKING NUMBER SERIES FOR ALL RS ACROSS WAVES. QUESTIONS D247 THROUGH D284 WERE ASKED IN 2014 AND WILL BE AGAIN IN 2018, BUT ARE NOT ASKED IN 2016.

D247

Next I'm going to read you several words and I'd like you to finish what I say by telling me the word that best completes the phrase.

For example, if I say "Mother is to Daughter as Father is to..." you would say "son." Mother is to Daughter as Father is to Son.

1. CONTINUE

D249

I am now going to read six more statements like the one you just ~~did~~ heard. I want you to tell me the word that best completes the phrase. Some of the problems may be easy but others may be hard. Just do the best you can. It is more important to answer the item correctly than to answer quickly, so take a little time to think before answering. It is okay if you do not know the answer because some of the items are intended to be very difficult. You can go on to the next item at any time. Are you ready to begin?

[IWER: REPEAT INSTRUCTIONS IF NECESSARY. PRESS 'CONTINUE' WHEN R IS READY TO BEGIN.]

1. CONTINUE

D250 BRANCHPOINT: IF R WAS RANDOMLY SELECTED TO BE ASKED SET 2 OF VERBAL ANALOGIES QUESTIONS (X526=2), GO TO D270

D250 VERBAL ANALOGIES ITEM G1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D251 VERBAL ANALOGIES ITEM H1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D252 VERBAL ANALOGIES ITEM I1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D265

COUNT SCORE FOR NUMBER CORRECT AMONG D250, D251, D252
(SUM OF NUMBER CORRECT {D250+D251+D252})

NUMBER OF ITEMS CORRECT

D253 BRANCHPOINT: IF R ANSWERED NONE OF THE FIRST THREE VERBAL ANALOGIES ITEMS CORRECTLY (D265=0), CONTINUE ON TO D253

IF R ANSWERED ONE VERBAL ANALOGIES QUESTION CORRECTLY (SUM OF {D250+D251+D252}=1)(D265=1), GO TO D256

IF R ANSWERED TWO VERBAL ANALOGIES QUESTIONS CORRECTLY (D265=2), GO TO D259

IF R ANSWERED THREE VERBAL ANALOGIES QUESTIONS CORRECTLY (D265=3), GO TO D262

D253 VERBAL ANALOGIES ITEM A1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D254 VERBAL ANALOGIES ITEM B1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D255 VERBAL ANALOGIES ITEM C1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D256 VERBAL ANALOGIES ITEM D1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D257 VERBAL ANALOGIES ITEM E1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D258 VERBAL ANALOGIES ITEM F1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D259 VERBAL ANALOGIES ITEM J1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D260 VERBAL ANALOGIES ITEM K1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D261 VERBAL ANALOGIES ITEM L1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D262 VERBAL ANALOGIES ITEM M1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D263 VERBAL ANALOGIES ITEM N1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D264 VERBAL ANALOGIES ITEM O1

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D270 VERBAL ANALOGIES ITEM G2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D271 VERBAL ANALOGIES ITEM H2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D272 VERBAL ANALOGIES ITEM I2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D285

COUNT SCORE FOR NUMBER CORRECT AMONG D270, D271, D272
(SUM OF NUMBER CORRECT {D270+D271+D272})

NUMBER OF ITEMS CORRECT

D273 BRANCHPOINT: IF R ANSWERED NONE OF THE FIRST THREE VERBAL ANALOGIES ITEMS CORRECTLY (D285=0), CONTINUE ON TO D273

IF R ANSWERED ONE VERBAL ANALOGIES QUESTION CORRECTLY (SUM OF {D270+D271+D272}=1)(D285=1), GO TO D276

IF R ANSWERED TWO VERBAL ANALOGIES QUESTIONS CORRECTLY (D285=2), GO TO D279

IF R ANSWERED THREE VERBAL ANALOGIES QUESTIONS CORRECTLY (D285=3), GO TO D282

D273 VERBAL ANALOGIES ITEM A2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D274 VERBAL ANALOGIES ITEM B2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D275 VERBAL ANALOGIES ITEM C2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D276 VERBAL ANALOGIES ITEM D2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D277 VERBAL ANALOGIES ITEM E2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D278 VERBAL ANALOGIES ITEM F2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D279 VERBAL ANALOGIES ITEM J2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D280 VERBAL ANALOGIES ITEM K2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D281 VERBAL ANALOGIES ITEM L2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
GO TO D172 BRANCHPOINT (AFTER D284)				

D282 VERBAL ANALOGIES ITEM M2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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뵡 VERBAL ANALOGIES ITEM N2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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D284 VERBAL ANALOGIES ITEM O2

1. CORRECT	5. NOT CORRECT	6. INVALID	8. DK	9. RF
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NOTE: D170. TICS SCORE COUNT:

A SCORE IS TABULATED BY BLAISE 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. NOTE THAT NOT ALL RESPONDENTS ARE ASKED D151 THROUGH 158.

SCORES FOR THE RETRIEVAL FLUENCY SERIES (D193-D199) AND THE NUMBER SERIES (D200-D235) ARE CALCULATED FOR EACH RESPONDENT LATER DURING POST-PROCESSING.

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
ASSISTANT

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

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

D502

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

D505

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 Z092), YEAR (per Z093)/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

D506

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?

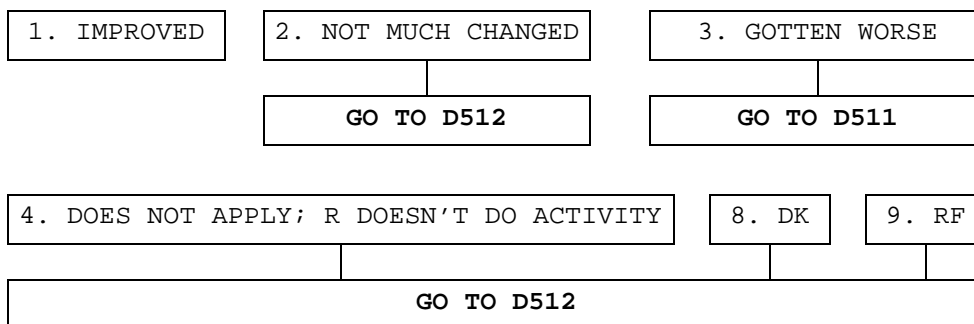
Was it much worse or a bit worse?

4. A BIT WORSE	5. MUCH WORSE	8. DK	9. RF
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D509

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?)

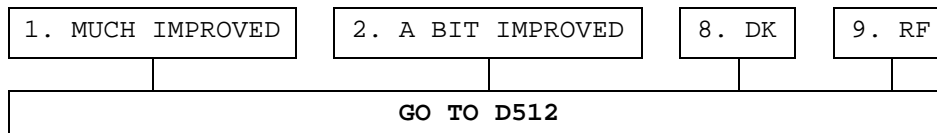
Compared with [when we interviewed [him/her] in *R's LAST IW MONTH, YEAR/two years ago*], how was *R's FIRST NAME* at:
Remembering things that had happened recently?
(Had this improved, not much changed, or gotten worse?)



D510

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D511

Is it much worse or a bit worse?

Was it much worse or a bit worse?



D512

(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 IW MONTH, YEAR/two years ago*], how was *R's FIRST NAME* at:)
Recalling conversations a few days later?
(Had 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?

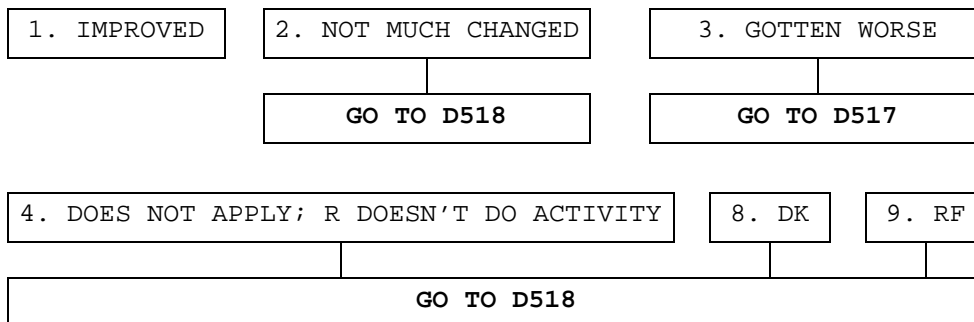
Was it much worse or a bit worse?

4. A BIT WORSE	5. MUCH WORSE	8. DK	9. RF
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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?)

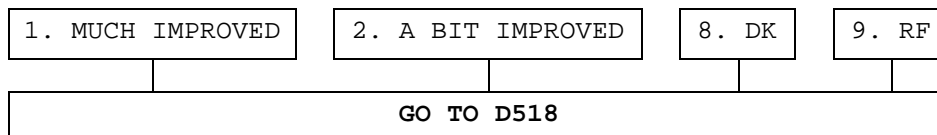
(Compared with [when we interviewed [him/her] in *R's LAST IW MONTH, YEAR/two years ago*], how was *R's FIRST NAME* at:)
Remembering [his/her] address and telephone number?
(Had this improved, not much changed, or gotten worse?)



D516

Is it much improved or a bit improved?

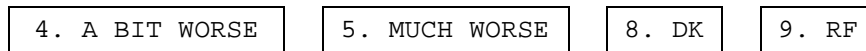
Was it much improved or a bit improved?



D517

Is it much worse or a bit worse?

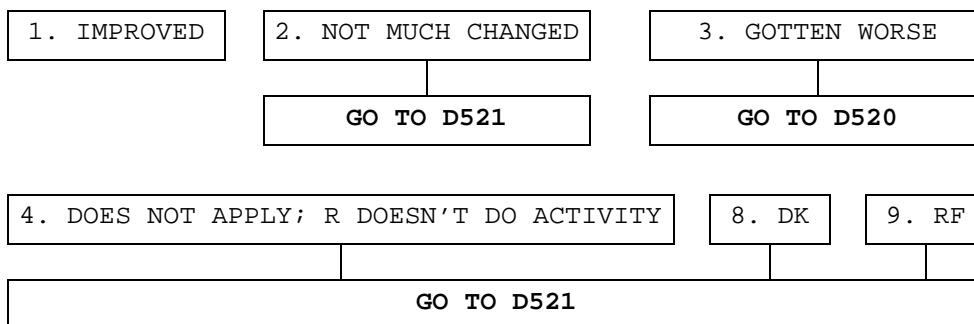
Was it much worse or a bit worse?



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?)

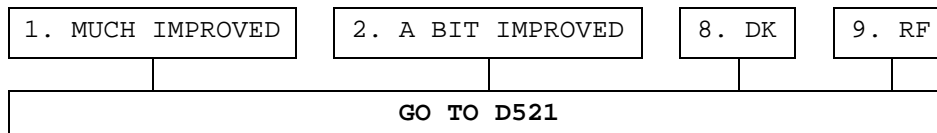
(Compared with [when we interviewed [him/her] in R's LAST IW MONTH,
YEAR/two years ago], how was R's FIRST NAME at:)
Remembering what day and month it was?
(Had this improved, not much changed, or gotten worse?)



D519

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D520

Is it much worse or a bit worse?

Was it much worse or a bit worse?



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
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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 IW 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?

(Had 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?

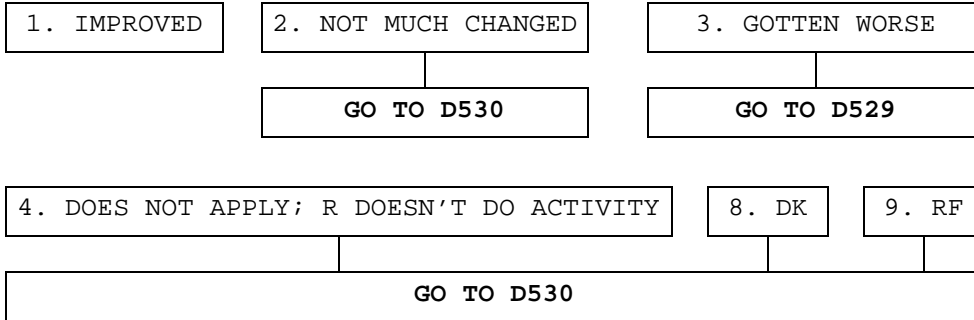
Was it much worse or a bit worse?

4. A BIT WORSE	5. MUCH WORSE	8. DK	9. RF
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D527

(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?)

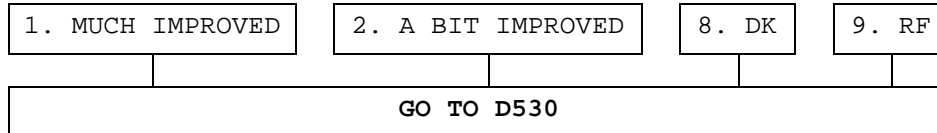
(Compared with [when we interviewed [him/her] in *R's LAST IW MONTH, YEAR/two years ago*], how was *R's FIRST NAME* at:)
Knowing how to work familiar machines around the house?
(Had this improved, not much changed, or gotten worse?)



D528

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D529

Is it much worse or a bit worse?

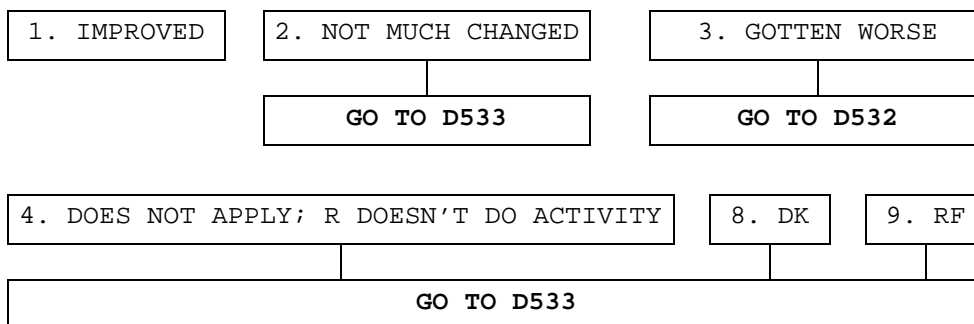
Was it much worse or a bit worse?



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?)

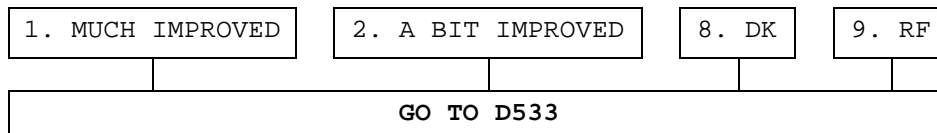
(Compared with [when we interviewed [him/her] in *R's LAST IW MONTH, YEAR/two years ago*], how was *R's FIRST NAME* at:)
Learning to use a new gadget or machine around the house?
(Had this improved, not much changed, or gotten worse?)



D531

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D532

Is it much worse or a bit worse?

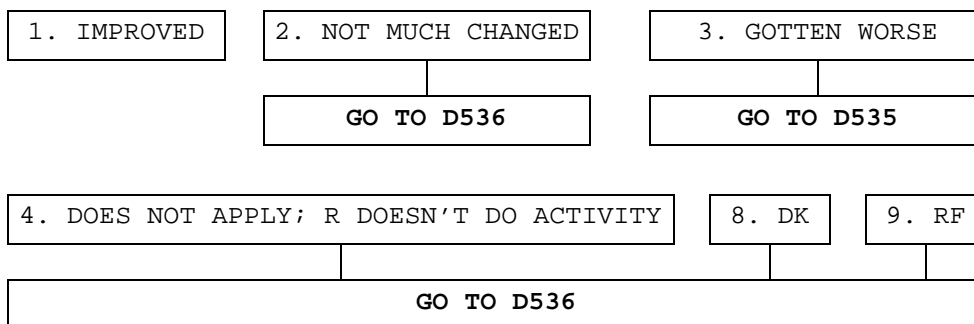
Was it much worse or a bit worse?



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?)

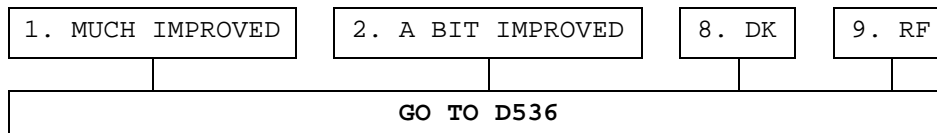
(Compared with [when we interviewed [him/her] in R's LAST IW MONTH,
YEAR/two years ago], how was R's FIRST NAME at:)
Learning new things in general?
(Had this improved, not much changed, or gotten worse?)



D534

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D535

Is it much worse or a bit worse?

Was it much worse or a bit worse?



D536

(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?
(Had this improved, not much changed, or gotten worse?)

1. IMPROVED	2. NOT MUCH CHANGED	3. GOTTEN WORSE
	GO TO D539	GO TO D538
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?

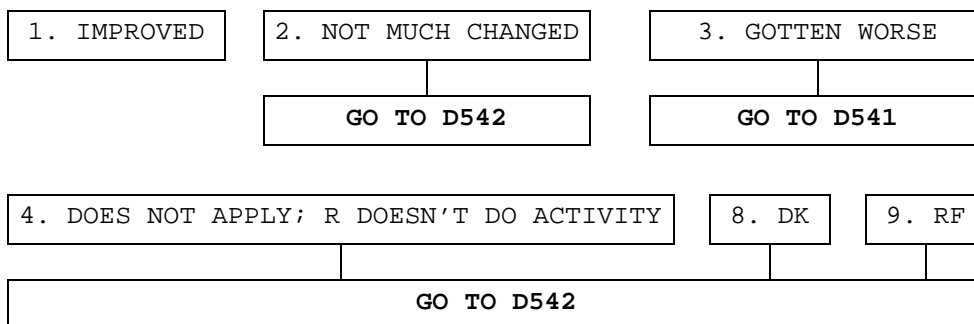
Was it much worse or a bit worse?

4. A BIT WORSE	5. MUCH WORSE	8. DK	9. RF
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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?)

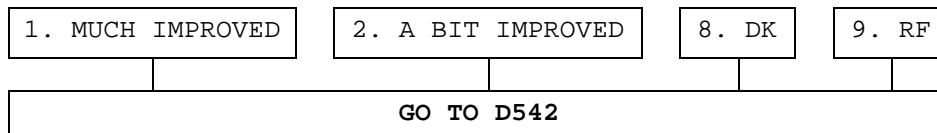
(Compared with [when we interviewed [him/her] in R's LAST IW MONTH,
YEAR/two years ago], how was R's FIRST NAME at:)
Making decisions on everyday matters?
(Had this improved, not much changed, or gotten worse?)



D540

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D541

Is it much worse or a bit worse?

Was it much worse or a bit worse?



D542

(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	GO TO D544
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
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D545

(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?

(Had 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?

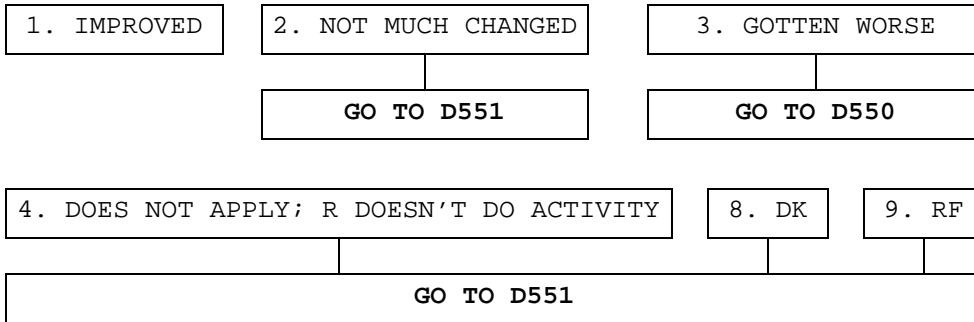
Was it much worse or a bit worse?

4. A BIT WORSE	5. MUCH WORSE	8. DK	9. RF
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D548

(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?)

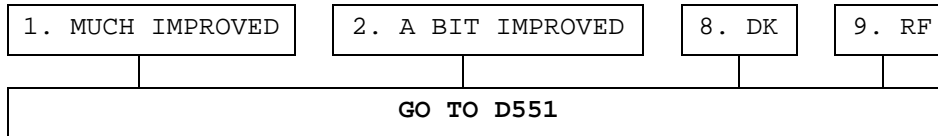
(Compared with [when we interviewed [him/her] in *R's LAST IW MONTH, YEAR*/two years ago], how was *R's FIRST NAME* at:)
Handling other everyday arithmetic problems, such as, knowing how much food to buy, knowing how long between visits from family or friends?
(Had this improved, not much changed, or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



D549

Is it much improved or a bit improved?

Was it much improved or a bit improved?



D550

Is it much worse or a bit worse?

Was it much worse or a bit worse?



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

GO TO SECTION E