

**HRS 2016 -- SECTION G: FUNCTIONAL LIMITATIONS AND HELPERS  
FINAL VERSION -- 8/15/2016**

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NOTE ABOUT BRANCHPOINTS:

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

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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.

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NOTE ABOUT EXIT INTERVIEW R<sub>s</sub>:

ANY NEW SPOUSE/PARTNER THAT AN EXIT INTERVIEW R ACQUIRED SINCE HIS/HER LAST INTERVIEW IS IGNORED FOR THE PURPOSES OF THIS INTERVIEW.

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MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES \*

THIS IS A REINTERVIEW R (Z076=1);  
THIS IS A NEW INTERVIEW R (Z076=5)

THIS IS A NEW POST-EXIT INTERVIEW (Z145=2);  
THIS IS A FIRST REPEAT POST-EXIT INTERVIEW (Z145=3);  
THIS IS A SECOND REPEAT POST-EXIT INTERVIEW (Z145=4)

R's FIRST NAME (per X058);  
SPOUSE'S, CHILD'S OR OTHER HHM'S CURRENT RESIDENCY STATUS (per X056)  
SPOUSE'S, CHILD'S OR OTHER HHM'S PW RESIDENCY STATUS (per X057)

SPOUSE'S,CHILD'S OR OTHER HHM's FIRST NAME (per X058)  
SPOUSE, CHILD OR OTHER HHM's RELATIONSHIP TO R (per X061)  
CHILD'S OR OTHER HHM'S MARITAL STATUS (per X065)  
CHILD'S OR OTHER HHM'S PW MARITAL STATUS (per X066)

ENHANCED FACE-TO-FACE INTERVIEW (X090 = 3)

R's AGE (per A018)

R LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED  
(A028=1)

FIRST NAME OF CHILD'S or HHM'S SPOUSE OR PARTNER (per A958)  
RESIDENCY STATUS OF CHILD'S or HHM'S SPOUSE OR PARTNER (per A956)

HELPER MOVED INTO HH BEFORE R'S DEATH (Exit only - per A136)  
RELATIONSHIP OF HELPER WHO MOVED IN ( Exit only - per A137)  
NAME OF HELPER WHO MOVED IN (Exit only - per A138)

NUMBER OF GRANDCHILDREN (per E046)

ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS (G215=0):

{G215 = (A504\_CurrWaveNdx - 9) MOD 2} = 0};

I.e., When subtracting the Indices (per A504) for Beginning Wave (Index XX1 for YrXXXX) from Current Wave (Index 9 for 2010), 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 (G215>0):

{G215 = {(A504\_CurrWaveNdx - 9) MOD 2} > 0};

I.e., Integer Result yields a Remainder

\*\* IN 2016 THIS ALTERNATE WAVE VARIABLE IS NOT 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.

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G001 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO SECTION  
T

IF THIS IS AN EXIT INTERVIEW, GO TO G129

G001

We need to understand difficulties people may have with various activities because of a health or physical problem. Please tell me whether you have any difficulty doing each of the everyday activities that I read to you. Exclude any difficulties that you expect to last less than three months.

Because of a health problem do you have any difficulty with walking several blocks?

IWER:IF R IS IN A NURSING HOME OR CONFINED TO BED OR SHEELCHAIR, YOU MAY READ THE FOLLOWING STATEMENT:

(I am required to ask about all of these activities. I realize that you may not be able to do some of them, but I would appreciate it if you would just confirm that with me as we go through the list.)

- 1. YES, GO TO G003
- 5. NO
- 6. (IF VOL) CAN'T DO, GO TO G003
- 7. (IF VOL) DON'T DO, GO TO G003
- DK, GO TO G003
- RF, GO TO G003

G002

(Because of a health problem do you have any difficulty) with running or jogging about a mile?

- 1. YES, GO TO G004
- 5. NO, GO TO G004
- 6. (IF VOL) CAN'T DO, GO TO G004
- 7. (IF VOL) DON'T DO, GO TO G004
- DK, GO TO G004
- RF, GO TO G004

G003

(Because of a health problem do you have any difficulty) with walking one block?

- 1. YES
- 5. NO, GO TO G008
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G004

(Because of a health problem do you have any difficulty) with sitting for about two hours?

- 1. YES
- 5. NO, GO TO G008
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G005

(Because of a health problem do you have any difficulty) with getting up from a chair after sitting for long periods?

- 1. YES
- 5. NO, GO TO G008
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G006

(Because of a health problem do you have any difficulty) with climbing several flights of stairs without resting?

- 1. YES
- 5. NO, GO TO G008
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G007

(Because of a health problem do you have any difficulty) with climbing one flight of stairs without resting?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G008

(Because of a health problem do you have any difficulty) with stooping, kneeling, or crouching?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G009

(Because of a health problem do you have any difficulty) with reaching or extending your arms above shoulder level?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G010

(Because of a health problem do you have any difficulty) with pulling or pushing large objects like a living room chair?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G011

(Because of a health problem do you have any difficulty) with lifting or carrying weights over 10 pounds, like a heavy bag of groceries?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G012

(Because of a health problem do you have any difficulty) with picking up a dime from a table?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G013 CHECKPOINT FOR ADLs/NAGIs: (G013TNagiCkpt\_A)

COUNT OF THE NUMBER OF THE FOLLOWING ITEMS

G001, G003, G004, G005, G007, G008, G009, G010, G011, G012

THAT ARE ANSWERED WITH

1. YES, 6. CAN'T DO, 7. DON'T DO, or 8. DK

G129 BRANCHPOINT: IF THIS IS A CORE INTERVIEW and R {{DID NOT HAVE DIFFICULTY WITH ANY OF THE MOBILITY QUESTIONS or REFUSED TO SAY} (G013=0)}, GO TO G036 BRANCHPOINT

IF THIS IS A CORE INTERVIEW, GO TO G014

G129

We need to understand difficulties people may have with various activities because of a health or physical problem.

About how many days did [he/she] stay in bed more than half the day because of illness or injury during the last three months before [his/her] death?

[IWER: USE ZERO FOR NONE]

[IWER: USE 93 FOR EVERY DAY]

\_\_\_\_\_  
DAYS

DK  
RF

G014 BRANCHPOINT: IF R STAYED IN BED FOR MORE THAN 85 DAYS IN THE THREE MONTHS BEFORE DEATH (G129>85), GO TO BEGINNING OF G032 LOOP BRANCHPOINT

IF THIS IS AN EXIT INTERVIEW, GO TO G015

G014

Here are a few more everyday activities. Please tell me if you have any difficulty with these because of a physical, mental, emotional or memory problem. Again exclude any difficulties you expect to last less than three months.

Because of a health or memory problem do you have any difficulty with dressing, including putting on shoes and socks?

- 1. YES
- 5. NO, GO TO G016 BRANCHPOINT
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G015

Does anyone ever help you dress?

The next questions are about help R's FIRST NAME (per X058) received with various activities. Please tell me if [he/she] had received any help with these because of a physical, mental, emotional or memory problem. We want to know about the help that [he/she] received during the last three months of [his/her] life.

Because of a health or memory problem did anyone help [him/her] with dressing, including putting on shoes and socks in the last three months of [his/her] life?

- 1. YES
- 5. NO
- DK
- RF
- 1. YES
- 5. NO, GO TO G020
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G020
- RF, GO TO G020

G130 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G016 BRANCHPOINT

G130

How long had [he/she] needed help with dressing?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

MONTHS \_\_\_\_\_

G131

\_\_\_\_\_  
YEARS

[OR]

G132

\_\_\_\_\_  
SINCE AGE

[OR]

G133

\_\_\_\_\_  
SINCE YEAR

DK

RF

G016 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G020

IF (G013=1) and R HAS NO DIFFICULTY DRESSING (G014=5), GO TO G036 BRANCHPOINT

G016

Because of a health or memory problem do you have any difficulty with walking across a room?

1. YES

5. NO

6. (IF VOL) CAN'T DO

7. (IF VOL) DON'T DO

DK

RF

G017

Do you ever use equipment or devices such as a cane, walker or wheelchair when crossing a room?

1. YES

5. NO, GO TO G020 BRANCHPOINT

DK, GO TO G020 BRANCHPOINT

RF, GO TO G020 BRANCHPOINT

G018



What equipment is that?

[IWER: CHOOSE ALL THAT APPLY]

1. RAILING
  2. WALKER
  3. CANE
  4. CRUTCHES
  5. ORTHOPEDIC SHOES
  6. BRACE (LEG OR BACK)
  7. PROSTHESIS
  8. OXYGEN/ RESPIRATOR
  9. FURNITURE/WALLS
  10. WHEELCHAIR/CART
  97. OTHER (SPECIFY)
- DK  
RF

G019 BRANCHPOINT: IF R DID NOT INDICATE OTHER (G018 NOT 97), GO TO G020  
BRANCHPOINT

G019

(What equipment is that?) Other (specify)

OTHER (SPECIFY) \_\_\_\_\_

G020 BRANCHPOINT: IF R HAS NO DIFFICULTY WALKING ACROSS A ROOM (G016=5), GO TO  
G021

G020

Does anyone ever help you get across a room?

Because of a health or memory problem did anyone help [him/her] get across a room (in the last three months of [his/her] life)?

1. YES
  5. NO
- DK  
RF
1. YES
  5. NO, GO TO G022
  6. (IF VOL) CAN'T DO
  7. (IF VOL) DON'T DO
- DK, GO TO G022  
RF, GO TO G022

G134 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G021

G134

How long had [he/she] needed help with walking?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G135

\_\_\_\_\_  
YEARS

[OR]

G136

\_\_\_\_\_  
SINCE AGE

[OR]

G137

\_\_\_\_\_  
SINCE YEAR

DK

RF

G021 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G022

G021

(Because of a health or memory problem do you have any difficulty with) bathing or showering?

1. YES

5. NO, GO TO G023

6. (IF VOL) CAN'T DO

7. (IF VOL) DON'T DO

DK

RF

G022

Does anyone ever help you bathe?

(Because of a health or memory problem) Did anyone help [him/her] with bathing or showering (in the last three months of [his/her] life)?

1. YES

5. NO

DK

RF

- 1. YES
- 5. NO, GO TO G024
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G024
- RF, GO TO G024

G138 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G023

G138

How long had [he/she] needed help with bathing or showering?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G139

\_\_\_\_\_  
YEARS

[OR]

G140

\_\_\_\_\_  
SINCE AGE

[OR]

G141

\_\_\_\_\_  
SINCE YEAR

DK

RF

G023 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G024

G023

(Because of a health or memory problem do you have any difficulty with) eating, such as cutting up your food?

- 1. YES
- 5. NO, GO TO G025
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G024

Does anyone ever help you eat?

(Because of a health or memory problem) Did anyone help [him/her] with eating, such as cutting up [his/her] food (in the last three months of [his/her] life)?

1. YES

5. NO

DK

RF

1. YES

5. NO, GO TO G029

6. (IF VOL) COULDN'T DO

7. (IF VOL) DIDN'T DO

DK, GO TO G029

RF, GO TO G029

G142 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G025

G142

How long had [he/she] needed help with eating?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G143

\_\_\_\_\_  
YEARS

[OR]

G144

\_\_\_\_\_  
SINCE AGE

[OR]

G170

\_\_\_\_\_  
SINCE YEAR

DK

RF

G025 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G029

G025

(Because of a health or memory problem do you have any difficulty with) getting in or out of bed?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G026

Do you ever use equipment or devices such as a cane, walker or railing when getting in or out of bed?

- 1. YES
- 5. NO, GO TO G029 BRANCHPOINT
- DK, GO TO G029 BRANCHPOINT
- RF, GO TO G029 BRANCHPOINT

G027

What equipment is that?

[IWER: CHOOSE ALL THAT APPLY]

- 1. RAILING
- 2. WALKER
- 3. CANE
- 4. CRUTCHES
- 5. ORTHOPEDIC SHOES
- 6. BRACE (LEG OR BACK)
- 7. PROSTHESIS
- 8. OXYGEN/ RESPIRATOR
- 9. FURNITURE/WALLS
- 10. WHEELCHAIR/CART
- 97. OTHER (SPECIFY)
- DK
- RF

G028 BRANCHPOINT: IF R DID NOT INDICATE OTHER (G027 NOT 97), GO TO G029 BRANCHPOINT

G028

(What equipment is that?)

Other (Specify):

\_\_\_\_\_  
OPEN

G029 BRANCHPOINT: IF R HAS NO DIFFICULTY GETTING OUT OF BED (G025=5), GO TO G030

G029

Does anyone ever help you get in or out of bed?

(Because of a health or memory problem) Did anyone help [him/her] with getting in or out of bed in the last three months of [his/her] life?

1. YES

5. NO

DK

RF

1. YES

5. NO, GO TO G031

6. (IF VOL) COULDN'T DO

7. (IF VOL) DIDN'T DO

DK, GO TO G031

RF, GO TO G031

G145 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G030

G145

How long had [he/she] needed help getting in or out of bed?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G146

\_\_\_\_\_  
YEARS

[OR]

G147

\_\_\_\_\_  
SINCE AGE

[OR]

G148

\_\_\_\_\_  
SINCE YEAR

DK

RF

G030 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G031

G030

(Because of a health or memory problem do you have) any difficulty with using the toilet, including getting up and down?

- 1. YES
- 5. NO, GO TO G032 LOOP BRANCHPOINT
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G031

Does anyone ever help you use the toilet?

(Because of a health or memory problem) Did anyone help [him/her] with using the toilet, including getting up and down in the last three months of [his/her] life?

- 1. YES
- 5. NO
- DK
- RF
- 1. YES
- 5. NO, GO TO G032 LOOP BRANCHPOINT
- 6. (IF VOL) COULDN'T DO
- 7. (IF VOL) DIDN'T DO
- DK, GO TO G032 LOOP BRANCHPOINT
- RF, GO TO G032 LOOP BRANCHPOINT

G149 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G032 LOOP BRANCHPOINT

G149

How long had [he/she] needed help with using the toilet?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G150

\_\_\_\_\_  
YEARS

[OR]

G151

\_\_\_\_\_  
SINCE AGE

[OR]

SINCE YEAR

DK

RF

G032 LOOP BRANCHPOINT: IF THIS IS A CORE INTERVIEW and R DID NOT REPORT THAT RECEIVES HELP WITH LAST SERIES OF ADLs ({G015 and G020 and G022 and G024 and G029 and G031} NOT 1), GO TO G036 BRANCHPOINT

IF THIS IS AN EXIT INTERVIEW and PROXY DID NOT REPORT {THAT R RECEIVED HELP WITH ANY OF LAST SERIES OF ADLs or THAT {COULDN'T or DIDN'T} DO ANY} ({G015 and G020 and G022 and G024 and G029 and G031} {NOT 1 and NOT 6 and NOT 7}) and DID NOT REPORT THAT R MOSTLY STAYED IN BED MORE THAN 85 DAYS IN THE 3 MONTHS BEFORE S/HE DIED (G129 {NOT > 85}), GO TO G043 BRANCHPOINT

**\*\*\*BEGINNING OF G032 LOOP: QUESTIONS G032 THROUGH G035 ARE REPEATED FOR UP TO SEVEN HELPERS. THESE QUESTIONS ARE BASED ON THE ACTIVITIES WITH WHICH THE R REPORTED RECEIVING HELP IN THE ADL SERIES, G014 THROUGH G031 ({G015 or G020 or G022 or G024 or G029 or G031}=1).\*\*\***

G176\_G03  
2

IF THIS IS THE FIRST TIME THROUGH THE ADL HELPER LOOP:

Who most often helps you with [getting across a room/dressing /bathing/eating/getting (in/out of) bed/using the toilet]?

NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED RECEIVING HELP IN PRIOR QUESTIONS.

IF THIS IS THE SECOND OR LATER TIME THROUGH THE ADL HELPER LOOP:

Who is that?



IF R STAYED IN BED MORE THAN 85 DAYS IN THE THREE MONTHS BEFORE DEATH (G129>85):  
When R's FIRST NAME was (mostly) bedridden, who helped [him/her] with doing things like  
bathing and dressing in the last three months of [his/her] life?

NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED  
RECEIVING HELP IN PRIOR QUESTIONS.

OTHERWISE:

Who most often helped [him/her] with  
[getting across a room  
/dressing  
/bathing  
/eating  
/getting (in/out of) bed  
/using the toilet]  
in the last three months of [his/her] life?

NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED  
RECEIVING HELP IN PRIOR QUESTIONS.

IF THIS IS THE SECOND OR LATER TIME THROUGH THE ADL HELPER LOOP:  
Who was that?

HELPER NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

2. R's SPOUSE/PARTNER NAME

3. THROUGH 72. HELPER NAME(S) (per X058) - RELATIONSHIP (per X061)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]

96. EMPLOYEE(S) OF FACILITY

97. OTHER - NOT ON LIST

DK

RF

*NOTE: "HELPERS" APPEARING ON THIS LIST, MUST BE LIVING AND IN CONTACT WITH R  
(Preload\_X057=1 or 2 or 3 or 5 and SecA\_x065 = 1 or 2 or 3 or 5), AND MUST BE ONE OF THE  
FOLLOWING: R'S CURRENT AND/OR PW HHMS, R'S CURRENT AND/OR EX-  
SPOUSE/PARTNER(S), R'S CHILDREN OR STEPCHILDREN, OR R'S CHILDREN'S OR  
STEPCHILDREN'S CURRENT AND/OR FORMER SPOUSES OR PARTNERS.*

*NOTE: ALL SUBSEQUENT LISTS WILL ALSO INCLUDE THE NAME (per X058) OF ANY HELPER(S)  
PREVIOUSLY NAMED FOLLOWING THE SELECTION OF "NOT ON LIST" (CODE 97); THIS APPLIES  
FOR ANY LIST FROM WHICH 97 IS SELECTED.*

*NOTE: "EMPLOYEE(S) OF FACILITY" APPEARS ON LIST ONLY FOR AN R CURRENTLY LIVING IN A  
NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED.*

G033 BRANCHPOINT: IF R MENTIONED THE NAME OF A HELPER AT G032 THAT IS NOT ON LIST (G032=97), CONTINUE ON TO G033

OTHERWISE, GO TO G035 BRANCHPOINT

G033

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

What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE:

What is that person's relationship to you?

[IWER: DON'T USE DK OR RF]

IF R WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED} (A028=1):

What was that person's relationship to [R's NAME], or were they an employee of the place [R's NAME] lived?

OTHERWISE:

What was that person's relationship to [R's NAME]?

[IWER: DON'T USE DK OR RF]

5. SPOUSE/PARTNER OF DAUGHTER

8. SPOUSE/PARTNER OF SON

9. GRANDCHILD

10. FATHER

11. FATHER-IN-LAW

12. MOTHER

13. MOTHER-IN-LAW

14. R'S PARENTS

15. BROTHER

16. BROTHER OF SPOUSE/PARTNER

17. SISTER

18. SISTER OF SPOUSE/PARTNER

19. OTHER RELATIVE

20. OTHER INDIVIDUAL

21. ORGANIZATION

22. EMPLOYEE OF "INSTITUTION", GO BACK TO G054 & ASSIGN 96: EMPLOYEE(S) OF FACILITY

28. UNLISTED CHILD OR CHILD-IN-LAW

30. FORMER STEP-CHILD

*NOTE: 'EMPLOYEE OF "INSTITUTION"' (CODE 22) APPEARS AS RESPONSE OPTION ONLY FOR AN R CURRENTLY LIVING IN A NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED.*

G034

What is the (first) name of that [organization/grandchild/relative/ individual/child/person]?

[IWER: DON'T USE DK OR RF. IF R DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER]

What is the (first) name of that [organization/grandchild/relative/ individual/child/person]?

[IWER: DON'T USE DK OR RF. IF R DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER]

\_\_\_\_\_  
NAME

G035 BRANCHPOINT: IF SEVEN ADL HELPERS HAVE ALREADY BEEN DESCRIBED, GO TO G036 BRANCHPOINT (OUT OF G032 LOOP)

G035

Does anyone else help you with (this activity/these activities)?

Did anyone else help [him/her] with (this activity/these activities)?

1. YES

5. NO, GO TO G036 BRANCHPOINT (OUT OF G032 LOOP)

DK, GO TO G036 BRANCHPOINT (OUT OF G032 LOOP)

RF, GO TO G036 BRANCHPOINT (OUT OF G032 LOOP)

G036 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G043 BRANCHPOINT

IF THIS IS A REINTERVIEW R (Z076=1) and ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (G215>0), GO TO G040

G036

When you ride in a car, how often do you wear your seatbelt? Is it all of the time, most of the time, sometimes, rarely, or never?

1. ALL

2. MOST

3. SOMETIMES

4. RARELY

5. NEVER

DK

RF

G037 BRANCHPOINT: IF R's CURRENT AGE IS LESS THAN 65 (A018<65), GO TO G040

G037

Are you able to drive?

- 1. YES
- 5. NO, GO TO G040
- 6. [VOL] NEVER DROVE, GO TO G040
- DK, GO TO G040
- RF, GO TO G040

G207

Have you driven a car in the past month?

- 1. YES
- 5. NO
- DK
- RF

G038

Do you have a car available to use when you need one?

- 1. YES
- 5. NO
- DK
- RF

G039 BRANCHPOINT: IF R DID NOT DRIVE IN THE PAST MONTH (G207=5), GO TO G040

G039

Do you limit your driving to nearby places, or do you also drive on longer trips?

- 1. LIMIT TO NEARBY
- 2. DRIVE LONG TRIPS
- 7. INAP: R DOES NOT DRIVE (VOL)
- DK
- RF

G040

IF R HAS NO DIFFICULTY DRESSING (G014=5) and R WAS NOT ASKED IF HAS DIFFICULTY WALKING (G016=EMPTY):

(Please tell me whether you have any difficulty with each activity I name. If you don't do the activity at all, just tell me so. Exclude any difficulties that you expect to last less than three months.)

OTHERWISE:

Here are a few other activities which some people have difficulty with because of a physical, mental, emotional, or memory problem.

Please tell me whether you have any difficulty with each activity I name. If you don't do the activity at all, just tell me so. Exclude any difficulties that you expect to last less than three months.

ASK ALL Rs:

Because of a health or memory problem, do you have any difficulty using a map to figure out how to get around in a strange place?

- 1. YES
- 5. NO
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK
- RF

G041

(Because of a health or memory problem do you have) any difficulty preparing a hot meal?

- 1. YES, GO TO G043 BRANCHPOINT
- 5. NO, GO TO G044
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G043 BRANCHPOINT
- RF, GO TO G043 BRANCHPOINT

G042

Is that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G044
- DK
- RF

G043 BRANCHPOINT: IF R {LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED} (A028=1), GO TO G044 BRANCHPOINT

G043

Does anyone help you prepare hot meals?

(Because of a health or memory problem,) Did anyone help [him/her] prepare hot meals in the last three months of [his/her] life?

1. YES

5. NO

DK

RF

1. YES, GO TO G153

5. NO, GO TO G046 BRANCHPOINT

6. (IF VOL) COULDN'T DO

7. (IF VOL) DIDN'T DO

DK, GO TO G046 BRANCHPOINT

RF, GO TO G046 BRANCHPOINT

G171 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G044

G171

Was that because of a health or memory problem?

1. YES

5. NO, GO TO G046 BRANCHPOINT

DK

RF

G153

How long had [he/she] needed help with preparing hot meals?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G154

\_\_\_\_\_  
YEARS

[OR]

G155

\_\_\_\_\_  
SINCE AGE

[OR]

G156

SINCE YEAR

DK

RF

G044 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G046 BRANCHPOINT

G044

(Because of a health or memory problem do you have) any difficulty with shopping for groceries?

1. YES, GO TO G046 BRANCHPOINT

5. NO, GO TO G047

6. (IF VOL) CAN'T DO

7. (IF VOL) DON'T DO

DK, GO TO G046 BRANCHPOINT

RF, GO TO G046 BRANCHPOINT

G045

Is that because of a health or memory problem?

1. YES

5. NO, GO TO G047

DK

RF

G046 BRANCHPOINT: IF R {LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED} (A028=1), GO TO G047 BRANCHPOINT

G046

Does anyone help you shop for groceries?

(Because of a health or memory problem,) Did anyone help [him/her] shop for groceries in the last three months of [his/her] life?

1. YES

5. NO

DK

RF

1. YES, GO TO G157

5. NO, GO TO G049

6. (IF VOL) COULDN'T DO

7. (IF VOL) DIDN'T DO

DK, GO TO G049

RF, GO TO G049

G173 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G047

G173

Was that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G049
- DK
- RF

G157

How long had [he/she] needed help with shopping for groceries?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G158

\_\_\_\_\_  
YEARS

[OR]

G159

\_\_\_\_\_  
SINCE AGE

[OR]

G160

\_\_\_\_\_  
SINCE YEAR

- DK
- RF

G047 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G049

G047

(Because of a health or memory problem do you have) any difficulty with making phone calls?

- 1. YES, GO TO G049
- 5. NO, GO TO G050
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G049
- RF, GO TO G049



G048

Is that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G050
- DK
- RF

G049

Does anyone help you make telephone calls?

(Because of a health or memory problem,) Did anyone help [him/her] make phone calls in the last three months of [his/her] life?

- 1. YES
- 5. NO
- DK
- RF
- 1. YES, GO TO G162
- 5. NO, GO TO G053 BRANCHPOINT
- 6. (IF VOL) COULDN'T DO
- 7. (IF VOL) DIDN'T DO
- DK, GO TO G053 BRANCHPOINT
- RF, GO TO G053 BRANCHPOINT

G161 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G050

G161

Was that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G053 BRANCHPOINT
- DK
- RF

G162

How long had [he/she] needed help making telephone calls?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G163

\_\_\_\_\_  
YEARS

G164

[OR]

\_\_\_\_\_  
SINCE AGE

G165

[OR]

\_\_\_\_\_  
SINCE YEAR

DK

RF

G050 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G053 BRANCHPOINT

G050

(Because of a health or memory problem do you have) any difficulty taking medications?

1. YES, GO TO G053 BRANCHPOINT
  5. NO, GO TO G054 LOOP BRANCHPOINT
  6. (IF VOL) CAN'T DO, GO TO G052
  7. (IF VOL) DON'T DO
- DK, GO TO G053 BRANCHPOINT  
RF, GO TO G053 BRANCHPOINT

G051

Do you think you would have any difficulty taking medications if you needed to do so?

1. YES
  5. NO, GO TO G054 LOOP BRANCHPOINT
- DK, GO TO G054 LOOP BRANCHPOINT  
RF, GO TO G054 LOOP BRANCHPOINT

G052

Is that because of a health or memory problem?

1. YES
  5. NO, GO TO G054 LOOP BRANCHPOINT
- DK  
RF

G053 BRANCHPOINT: IF R {LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED} (A028=1) or IF R DOESN'T TAKE MEDICATIONS (G050=7), GO TO G054 LOOP BRANCHPOINT

G053

Does anyone help you with taking medications?

(Because of a health or memory problem,) Did anyone help [him/her] with taking medications in the last three months of [his/her] life?

1. YES

5. NO

DK

RF

1. YES, GO TO G166

5. NO, GO TO G054 LOOP BRANCHPOINT

6. (IF VOL) COULDN'T DO

7. (IF VOL) DIDN'T DO

DK, GO TO G054 LOOP BRANCHPOINT

RF, GO TO G054 LOOP BRANCHPOINT

G174 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO G054 LOOP BRANCHPOINT

G174

Was that because of a health or memory problem?

1. YES

5. NO, GO TO G054 LOOP BRANCHPOINT

DK

RF

G166

How long had [he/she] needed help taking medications?

[IWER: RECORD MONTHS OR YEARS, OR SINCE AGE, OR SINCE YEAR]

\_\_\_\_\_  
MONTHS

[OR]

G167

\_\_\_\_\_  
YEARS

[OR]

G168

SINCE AGE

[OR]

G169

SINCE YEAR

DK

RF

G054 LOOP BRANCHPOINT: IF THIS IS A CORE INTERVIEW and R DID NOT REPORT {THAT SOMEONE HELPED WITH ANY OF THE 4 IADLs ({G043 and G046 and G049 and G053} NOT 1), GO TO G058 BRANCHPOINT

IF THIS IS AN EXIT INTERVIEW

and {PROXY DID NOT REPORT THAT {SOMEONE HELPED WITH ANY OF THE 4 IADLs

or {COULDN'T or DIDN'T} DO ANY}

or {PROXY REPORTED {THAT {COULDN'T or DIDN'T} DO ANY BUT IT WAS NOT BECAUSE OF A HEALTH OR MEMORY PROBLEM}}}

{{{ G043 {NOT 1 and NOT 6 and NOT 7}}

or (G043={6 or 7} and G171=5)}

and {{ G046 {NOT 1 and NOT 6 and NOT 7}}

or (G046={6 or 7} and G173=5)}

and {{(G049 {NOT 1 and NOT 6 and NOT 7}}

or (G049={6 or 7} and G161=5)}

and {{(G053 {NOT 1 and NOT 6 and NOT 7}}

or (G053={6 or 7} and G174=5}}},

GO TO G058 BRANCHPOINT

**\*\*\*BEGINNING OF G054 LOOP: QUESTIONS G054 THROUGH G057 ARE REPEATED FOR UP TO SIX HELPERS. THESE QUESTIONS ARE BASED ON DIFFICULTIES MENTIONED IN THE IADL SERIES, G040 THROUGH G053.\*\*\***

G188\_G05

4

IF THIS IS THE FIRST TIME THROUGH THE IADL HELPER LOOP:

Who most often helps you

[prepare meals,  
/shop for groceries,  
/make telephone calls,  
/take medications]?

NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED RECEIVING HELP IN PRIOR QUESTIONS.

IF THIS IS THE SECOND OR LATER TIME THROUGH THE IADL HELPER LOOP:

Who is that?

IF THIS IS THE FIRST TIME THROUGH THE IADL HELPER LOOP:

Who most often helped [him/her]

[prepare meals,  
/shop for groceries,  
/make telephone calls,  
/take medications]?

NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED RECEIVING HELP IN PRIOR QUESTIONS.

IF THIS IS THE SECOND OR LATER TIME THROUGH THE IADL HELPER LOOP:

Who else helped [him/her]?

HELPER NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

2. R's SPOUSE/PARTNER NAME

3. THROUGH 72. HELPER NAME(S) (per X058) - RELATIONSHIP (per X061)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

96. EMPLOYEE(S) OF FACILITY

97. OTHER - NOT ON LIST

DK

RF

NOTE: "HELPERS" APPEARING ON THIS LIST MUST BE LIVING AND IN CONTACT WITH R (Preload\_X057=1 or 2 or 3 or 5 and SecA\_x065 = 1 or 2 or 3 or 5), AND MUST BE ONE OF THE FOLLOWING: R'S CURRENT AND/OR PW HHMS, R'S CURRENT AND/OR EX-SPOUSE/PARTNER(S), R'S CHILDREN OR STEPCHILDREN, OR R'S CHILDREN'S OR STEPCHILDREN'S CURRENT AND/OR FORMER SPOUSES OR PARTNERS.

NOTE: ALL SUBSEQUENT LISTS WILL ALSO INCLUDE THE NAME (per X058) OF ANY HELPER(S) PREVIOUSLY NAMED FOLLOWING THE SELECTION OF "NOT ON LIST" (CODE 97); THIS APPLIES FOR ANY LIST FROM WHICH 97 IS SELECTED.

NOTE: "EMPLOYEE(S) OF FACILITY" APPEARS ON LIST ONLY FOR AN R CURRENTLY LIVING IN A NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED.

G055 BRANCHPOINT: IF R GAVE NAME OF HELPER AT G054 THAT IS NOT ON LIST (G054=97),  
CONTINUE ON TO G055

OTHERWISE, GO TO G057 BRANCHPOINT

G055

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

What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE:

What is that person's relationship to you?

[IWER: DON'T USE DK OR RF]

IF R WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED (A028=1):

What was that person's relationship to [R's NAME], or were they an employee of the place  
[R's NAME] lived?

OTHERWISE:

What was that person's relationship to [R's NAME]?

[IWER: DON'T USE DK OR RF]

5. SPOUSE/PARTNER OF DAUGHTER
8. SPOUSE/PARTNER OF SON
9. GRANDCHILD
10. FATHER
11. FATHER-IN-LAW
12. MOTHER
13. MOTHER-IN-LAW
14. R'S PARENTS
15. BROTHER
16. BROTHER OF SPOUSE/PARTNER
17. SISTER
18. SISTER OF SPOUSE/PARTNER
19. OTHER RELATIVE
20. OTHER INDIVIDUAL
21. ORGANIZATION
22. EMPLOYEE OF "INSTITUTION", GO BACK TO G054 & ASSIGN 96: EMPLOYEE(S) OF FACILITY
28. UNLISTED CHILD OR CHILD-IN-LAW
30. FORMER STEP-CHILD

*NOTE: 'EMPLOYEE OF "INSTITUTION"' (CODE 22) APPEARS AS RESPONSE OPTION ONLY FOR AN R CURRENTLY LIVING IN A NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED. DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.*

G056

What is the (first) name of that [grandchild/relative/individual/ child/former step-child/organization]?

[IWER: DON'T USE DK OR RF. IF R DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER]

What is the (first) name of that [grandchild/relative/individual/ child/former step-child/organization]?

[IWER: DON'T USE DK OR RF. IF R DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER]

\_\_\_\_\_  
NAME

G057 BRANCHPOINT: IF SIX IADL HELPERS HAVE ALREADY BEEN DESCRIBED, GO TO G058 BRANCHPOINT (OUT OF G054 LOOP)

G057

Does anyone else help you [prepare meals,/shop for groceries,/make telephone calls,/take medications]?

*NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED RECEIVING HELP IN PRIOR QUESTIONS.*

Did anyone else help [him/her] [prepare hot meals,/shop for groceries, /make telephone calls,/take medications]?

*NOTE: INCLUDED IN THE QUESTION, ABOVE, ARE ANY ACTIVITIES WITH WHICH R REPORTED RECEIVING HELP IN PRIOR QUESTIONS.*

1. YES

5. NO, GO TO G058 BRANCHPOINT (OUT OF G054 LOOP)

DK, GO TO G058 BRANCHPOINT (OUT OF G054 LOOP)

RF, GO TO G058 BRANCHPOINT (OUT OF G054 LOOP)

G058 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G061

IF R LIVES IN NURSING HOME (A028=1), GO TO G059

G058

(Besides any help you have told me about,) do you get any help with work around the house or yard because of a health problem?

1. YES

5. NO

DK

RF

G059

(Because of a health or memory problem) do you have any difficulty with managing your money -- such as paying your bills and keeping track of expenses?

- 1. YES, GO TO G061
- 5. NO, GO TO G070 LOOP BRANCHPOINT
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G061
- RF, GO TO G061

G060

Is that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G070 LOOP BRANCHPOINT
- DK
- RF

G061

Does anyone ever help you manage your money?

Because of a health or memory problem, did anyone help [him/her] manage [his/her] money -  
- such as paying [his/her] bills and keeping track of expenses in the last three months of  
[his/her] life?

- 1. YES
- 5. NO, GO TO G070 LOOP BRANCHPOINT
- DK, GO TO G070 LOOP BRANCHPOINT
- RF, GO TO G070 LOOP BRANCHPOINT
- 1. YES, GO TO BEGINNING OF G062 LOOP
- 5. NO, GO TO G070 LOOP BRANCHPOINT
- 6. (IF VOL) CAN'T DO
- 7. (IF VOL) DON'T DO
- DK, GO TO G070 LOOP BRANCHPOINT
- RF, GO TO G070 LOOP BRANCHPOINT

G191\_G060 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO BEGINNING OF G062 LOOP

G191\_G060

Is that because of a health or memory problem?

- 1. YES
- 5. NO, GO TO G070 LOOP BRANCHPOINT
- DK
- RF

G191\_G060



Was that because of a health or memory problem?

1. YES

5. NO, GO TO G070 LOOP BRANCHPOINT

DK

RF

\*\*\*BEGINNING OF G062 LOOP: QUESTIONS G062 THROUGH G065 ARE REPEATED FOR UP TO TWO HELPERS.\*\*\*

G190\_G06

2

IF THIS IS THE FIRST TIME THROUGH THE FINANCIAL HELPER LOOP:

Who most often helps you manage your money?

IF THIS IS THE SECOND TIME THROUGH THE FINANCIAL HELPER LOOP:

Who is that?

IF THIS IS THE FIRST TIME THROUGH THE FINANCIAL HELPER LOOP:

Who most often helped [him/her] manage [his/her] money in the last three months of [his/her] life?

IF THIS IS THE SECOND TIME THROUGH THE FINANCIAL HELPER LOOP:

Who was that?

HELPER NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

2. R's SPOUSE/PARTNER NAME

3. THROUGH 72. HELPER NAME(S) (per X058)  RELATIONSHIP (per X061)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

96. EMPLOYEE(S) OF FACILITY

97. OTHER -- NOT ON LIST

DK

RF

NOTE: "HELPERS" APPEARING ON THIS LIST MUST BE LIVING AND IN CONTACT WITH R (Preload\_X057=1 or 2 or 3 or 5 and SecA\_x065 = 1 or 2 or 3 or 5), AND MUST BE ONE OF THE FOLLOWING: R'S CURRENT AND/OR PW HHMS, R'S CURRENT AND/OR EX-SPOUSE/PARTNER(S), R'S CHILDREN OR STEPCHILDREN, OR R'S CHILDREN'S OR STEPCHILDREN'S CURRENT AND/OR FORMER SPOUSES OR PARTNERS

NOTE: ALL SUBSEQUENT LISTS WILL ALSO INCLUDE THE NAME (per X058) OF ANY HELPER(S) PREVIOUSLY NAMED FOLLOWING THE SELECTION OF "NOT ON LIST" (CODE 97); THIS APPLIES FOR ANY LIST FROM WHICH 97 IS SELECTED.

NOTE: "EMPLOYEE(S) OF FACILITY" APPEARS ON LIST ONLY FOR AN R CURRENTLY LIVING IN A NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED.

G063 BRANCHPOINT: IF R GAVE NAME OF HELPER AT G062 THAT IS NOT ON LIST (G062=97),  
CONTINUE ON TO G063

OTHERWISE, GO TO G065 BRANCHPOINT

G063

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

What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE:

What is that person's relationship to you?

[IWER: DON'T USE DK OR RF]

IF R WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED} (A028=1):

What was that person's relationship to [R's NAME], or were they an employee of the place  
[R's NAME] lived?

OTHERWISE:

What was that person's relationship to [R's NAME]?

[IWER: DON'T USE DK OR RF]

5. SPOUSE/PARTNER OF DAUGHTER
8. SPOUSE/PARTNER OF SON
9. GRANDCHILD
10. FATHER
11. FATHER-IN-LAW
12. MOTHER
13. MOTHER-IN-LAW
14. R'S PARENTS
15. BROTHER
16. BROTHER OF SPOUSE/PARTNER
17. SISTER
18. SISTER OF SPOUSE/PARTNER
19. OTHER RELATIVE
20. OTHER INDIVIDUAL
21. ORGANIZATION
22. EMPLOYEE OF "INSTITUTION", GO BACK TO G054 & ASSIGN 96: EMPLOYEE(S) OF FACILITY
28. UNLISTED CHILD OR CHILD-IN-LAW
30. FORMER STEP-CHILD

*NOTE: 'EMPLOYEE OF "INSTITUTION"' (CODE 22) APPEARS AS RESPONSE OPTION ONLY FOR AN R CURRENTLY LIVING IN A NURSING HOME OR WHO WAS LIVING IN A NURSING HOME OR HOSPICE WHEN S/HE DIED. DON'T KNOW/DK AND REFUSE/RF ARE NOT ACCEPTABLE RESPONSES.*

G064

What is the (first) name of that [grandchild/relative/individual/ child/organization]?

IWER: DON'T USE DK OR RF. IF RESPONDENT DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER.

What is the (first) name of that [grandchild/relative/individual/ child/organization]?

IWER: DON'T USE DK OR RF. IF R DOESN'T KNOW HELPER NAME, TYPE SOMETHING TO IDENTIFY THIS HELPER LATER

\_\_\_\_\_  
NAME

G065 BRANCHPOINT: IF TWO FINANCIAL HELPERS HAVE ALREADY BEEN DESCRIBED, GO TO G070 LOOP BRANCHPOINT (OUT OF G062 LOOP)

G065

Does anyone else help you manage your money?

Did anyone else help [him/her] manage [his/her] money in the last three months of [his/her] life?

1. YES

5. NO, GO TO G070 LOOP BRANCHPOINT (OUT OF G062 LOOP)

DK, GO TO G070 LOOP BRANCHPOINT (OUT OF G062 LOOP)

RF, GO TO G070 LOOP BRANCHPOINT (OUT OF G062 LOOP)

G066

NOTE: AT THIS POINT A LIST IS COMPILED BY BLAISE OF ALL HELPERS MENTIONED IN THIS SECTION. THE LIST WILL COMPILE UP TO 15 NAMES, EXCLUDING EMPLOYEES OF FACILITIES. THIS LIST IS NOT VISIBLE TO THE IWER

PERSON INDEX	NAME	RELATIONSHIP TO RESPONDENT

G070 LOOP BRANCHPOINT: IF THERE ARE NO HELPERS ON THE HELPER LIST AT G066 ABOVE, GO TO G208 BRANCHPOINT

\*\*\*BEGINNING OF G070 LOOP: QUESTIONS G070 THROUGH G083 ARE REPEATED FOR UP TO 15 HELPERS ON THE LIST. THE ORDER OF HELPERS ON THE LIST AT G066 BEGINS WITH HELPERS WHO ARE CHILDREN(-IN-LAW), IF ANY, THROUGH ALL CHILD HELPERS, THEN NON-CHILD HHMS, THEN PERSONS WHO WERE ADDED AT G032 THROUGH G062, ABOVE, AND LASTLY R'S SPOUSE/PARTNER. \*\*\*

G070A

NAME OF HELPER (per G068)  
RELATIONSHIP OF HELPER TO R (per G069)

IF FIRST HELPER:  
HELPER INTRO:

Let's think for a moment about the help you receive that we just talked about.

ASK FOR ALL HELPERS:

[First/Next] the help from [HELPERn NAME/your [husband/wife/ partner]].

During the last month, on about how many days did HELPERn NAME help you?

[IWER: ENTER 0 IN "DAYS IN A TYPICAL MONTH" IF THE PERSON WAS NOT A HELPER]

NAME OF HELPER (per G068)  
RELATIONSHIP OF HELPER TO R (per G069)

IF FIRST HELPER:  
HELPER INTRO:

Let's think for a moment about the help [he/she] received that we just talked about.

ASK FOR ALL HELPERS:

[First/Next], the help from [HELPERn NAME/you/[his/her] [husband/wife/partner]]. If no help was given just say so.

In a typical month, on about how many days did [HELPERn NAME/you/[his/her] [husband/wife/partner]] help [him/her]?

[IWER: ENTER 0 IN "DAYS IN A TYPICAL MONTH" IF THE PERSON WAS NOT A HELPER]

DAYS IN LAST MONTH\_\_\_\_\_

0 NOT A HELPER IN LAST MONTH, GO TO END OF G070 LOOP

DK

RF

[OR]

DAYS IN A TYPICAL MONTH\_\_\_\_\_

0 NOT A HELPER IN LAST MONTH, GO TO END OF G070 LOOP

DK

RF

[OR]

\_\_\_\_\_  
DAYS PER WEEK

DK  
RF

[OR]

G072A

\_\_\_\_\_  
EVERY DAY

DK  
RF

*NOTE: THE IWER ENTERS INFORMATION AT ANY 1 OF THE ABOVE 3 VARIABLE LOCATIONS ON THE SCREEN. ENTRY AT ONE LOCATION TAKES IWER IMMEDIATELY TO G073, EXCEPT FOR G070=0.*

G073A

On the days [HELPERn NAME/your [husband/wife/partner]] helps you, about how many hours per day is that?

[IWER: LESS THAN AN HOUR = 1]

On the days [HELPERn NAME/you/[his/her] [husband/wife/partner]] helped [him/her], about how many hours per day was that?

[IWER: LESS THAN AN HOUR = 1]

\_\_\_\_\_  
HOURS

DK  
RF

G074 BRANCHPOINT: IF HELPER IS R's SPOUSE/PARTNER (G069=2), GO TO G208 BRANCHPOINT (OUT OF LOOP)

G074A

[IWER: ASK ONLY IF NECESSARY]

AFFIRM SEX OF HELPER:  
(IS HELPERn NAME (per G068) MALE OR FEMALE?)  
[IWER: ASK ONLY IF NECESSARY]

AFFIRM SEX OF HELPER:  
(IS HELPERn NAME (per G068) MALE OR FEMALE?)

- 1. MALE
- 2. FEMALE
- 3. AGENCY/PROFESSIONAL/EMPLOYEE OF 'INSTITUTION'
- DK
- RF

G075 BRANCHPOINT: IF HELPER IS NOT A GRANDCHILD(-IN-LAW) (G069 {NOT 9 and NOT 33}), GO TO G076

G180\_G07  
5

IF GRANDCHILD:  
(Which of your children is the parent of that grandchild?)

IF GRANDCHILD:  
(Which of [his/her] children is the parent of that grandchild?)

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD (& SPOUSE/PARTNER) NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

- DK
- RF

G076A

Is HELPERn NAME paid to help you?

Was HELPERn NAME paid to help [him/her]?

- 1. YES
- 5. NO, GO TO END OF G070 LOOP
- DK, GO TO END OF G070 LOOP
- RF, GO TO END OF G070 LOOP

G077A

Does ([Medicare,] Medicaid/STATE NAME FOR MEDICAID) or insurance help pay HELPERn NAME?

Did (Medicaid/STATE NAME FOR MEDICAID) or insurance help pay HELPERn NAME?

- 1. YES
- 5. NO
- DK
- RF

G078A

(Not counting expenses paid by ([Medicare,] Medicaid Medicaid/STATE NAME FOR MEDICAID) or insurance,) about how much did you (and your [husband/wife/partner]) end up paying HELPERn NAME for the last month?

(Not counting expenses paid by (Medicaid/STATE NAME FOR MEDICAID) or insurance,) about how much did [he/she] (and [you/[his/her] [husband/wife/partner]]) end up paying HELPERn NAME per month?

AMOUNT

0, GO TO G080 BRANCHPOINT  
DK, GO TO G080 BRANCHPOINT  
RF, GO TO G080 BRANCHPOINT

G079A

PER:

1. MONTH
  2. WEEK
  3. DAY
  5. YEAR
- DK  
RF

G080 BRANCHPOINT: IF R GAVE AMOUNT THAT PAID HELPER (G078 {NOT DK and NOT RF}),  
GO TO G081 BRANCHPOINT

G080A

Did it amount to less than \$100 per month, more than \$100 per month, or what?

1. LESS THAN \$100 PER MONTH
  3. ABOUT \$100 PER MONTH
  5. MORE THAN \$100 PER MONTH
- DK  
RF

G081 BRANCHPOINT: IF R PAID NOTHING FOR HELPER (G078={0 and NOT DK and NOT RF}),  
GO TO END OF G070 LOOP

G081A

Does any other person help you (and your [husband/wife/partner]) pay this cost?

Did any other person help [him/her] (and [you/[his/her] [husband/wife/partner]]) pay this cost?

1. YES
  5. NO, GO TO END OF G070 LOOP
- DK, GO TO END OF G070 LOOP  
RF, GO TO END OF G070 LOOP

G082A

Is that a (child or other) relative of yours (and your [husband/wife/ partner]), or is that someone else?

Was that a (child or other) relative of [his/hers] (and [yours/[his/her] [husband's/wife's/partner's]]), or was that someone else?

1. CHILD/CHILD-IN-LAW/GRANDCHILD
  2. OTHER RELATIVE, GO TO END OF G070 LOOP
  3. SOMEONE ELSE, GO TO END OF G070 LOOP
- DK, GO TO END OF G070 LOOP  
RF, GO TO END OF G070 LOOP

G181\_G08  
3

(Which child is that?)

IF GRANDCHILD:

(Which of your children is the parent of that grandchild?)

(Which child is that?)

IF GRANDCHILD:

(Which of [his/her] children is the parent of that grandchild?)

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

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

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

DK

RF

G208 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO G103

IF THIS IS NOT AN ENHANCED FACE-TO-FACE INTERVIEW

(X090 NOT 3), GO TO G086

G208

The next questions are about different aspects of your health.

How would you rate your hand strength?

Would you say it is very strong, somewhat strong, somewhat weak, or very weak?

1. VERY STRONG
  2. SOMEWHAT STRONG
  3. SOMEWHAT WEAK
  4. VERY WEAK
- DK  
RF

G209



How often do you become short of breath while awake?

Would you say often, sometimes, rarely, or never?

[IWER: DO NOT INCLUDE PERIODS OF EXERCISE.]

- 1. OFTEN
- 2. SOMETIMES
- 3. RARELY
- 4. NEVER
- DK
- RF

G210

How often do you have difficulty with balance?

Would you say often, sometimes, rarely, or never?

- 1. OFTEN
- 2. SOMETIMES
- 3. RARELY
- 4. NEVER
- DK
- RF

G086\_

These next questions ask about volunteer work and helping activities.

Have you spent any time in the past 12 months doing volunteer work for religious, educational, health-related or other charitable organizations?

- 1. YES
- 5. NO, GO TO G198
- DK, GO TO G198
- RF, GO TO G198

G195

Altogether, would you say the time amounted to less than 100 hours, more than 100 hours, or what?

- 1. LESS THAN 100, GO TO G197
- 3. ABOUT 100, GO TO G198
- 5. MORE THAN 100
- DK, GO TO G198
- RF, GO TO G198

G196

Would it be less than 200 hours, more than 200 hours, or what?

- 1. LESS THAN 200, GO TO G198
- 3. ABOUT 200, GO TO G198
- 5. MORE THAN 200, GO TO G198
- DK, GO TO G198
- RF, GO TO G198

G197

Would it be less than 50 hours, more than 50 hours, or what?

- 1. LESS THAN 50
- 3. ABOUT 50
- 5. MORE THAN 50
- DK
- RF

G198

Have you spent any time in the past 12 months helping friends, neighbors, or relatives who did not live with you and did not pay you for the help?

- 1. YES
- 5. NO, GO TO G097 BRANCHPOINT
- DK, GO TO G097 BRANCHPOINT
- RF, GO TO G097 BRANCHPOINT

G199

Altogether, would you say the time amounted to less than 100 hours, more than 100 hours, or what?

- 1. LESS THAN 100, GO TO G201
- 3. ABOUT 100, GO TO G097 BRANCHPOINT
- 5. MORE THAN 100
- DK, GO TO G097 BRANCHPOINT
- RF, GO TO G097 BRANCHPOINT

G200

Would it be less than 200 hours, more than 200 hours, or what?

- 1. LESS THAN 200, GO TO G097 BRANCHPOINT
- 3. ABOUT 200, GO TO G097 BRANCHPOINT
- 5. MORE THAN 200, GO TO G097 BRANCHPOINT
- DK, GO TO G097 BRANCHPOINT
- RF, GO TO G097 BRANCHPOINT

G201

Would it be less than 50 hours, more than 50 hours, or what?

- 1. LESS THAN 50
- 3. ABOUT 50
- 5. MORE THAN 50
- DK
- RF

G097 BRANCHPOINT: IF R LIVES IN A NURSING HOME (A028=1) or R NAMED AT LEAST ONE HELPER(S) (G097HelperCounter>0 {per G032 or G054 or G062}), GO TO G101 (G ASSIST)

G097

Suppose in the future, you needed help with basic personal care activities like eating or dressing.

Do you have relatives or friends [besides [your ] [partner|husband|wife]] who would be willing and able to help you over a long period of time?

- 1. YES
- 5. NO, GO TO G101 (G ASSIST)
- DK, GO TO G101 (G ASSIST)
- RF, GO TO G101 (G ASSIST)

G098M

What is the relationship to you of that person or persons?

[IWER: CHOOSE ALL THAT APPLY]

- 1. CHILD/ CHILD-IN-LAW
- 2. GRANDCHILD, GO TO G100 BRANCHPOINT
- 3. OTHER RELATIVE, GO TO G100 BRANCHPOINT
- 4. SOMEONE ELSE, GO TO G100 BRANCHPOINT
- DK, GO TO G100 BRANCHPOINT
- RF, GO TO G100 BRANCHPOINT

G193\_G09  
9

(Which (child is that/children are those)?)

[IWER: CHOOSE ALL THAT APPLY]

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

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

[ROWS PROVIDED BY BLAISE AS NECESSARY]

- 93. ALL CHILDREN
- DK
- RF

G100 BRANCHPOINT: IF A GRANDCHILD IS NOT A FUTURE HELPER (G098 NOT 2),  
GO TO G101 (G ASSIST)

G194\_G10  
0

IF ONE GRANDCHILD (E046=1):  
(Which of your children is the parent of that grandchild?)

IF MORE THAN ONE GRANDCHILD (E046>1):  
(Which of your children are the parents of those grandchildren?)

[IWER: CHOOSE ALL THAT APPLY]

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

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

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

93. ALL CHILDREN

DK

RF

G103 BRANCHPOINT: IF THIS IS A CORE INTERVIEW, GO TO G101

G103A

(Because of a health or memory problem,) in the last three months of R's FIRST NAME's life did anyone help by supervising [him/her] to ensure safety, provide reassurance, or to make sure that nothing went wrong?

1. YES , GO TO END OF SECTION G

5. NO, GO TO END OF SECTION G

DK, GO TO END OF SECTION G

RF, GO TO END OF SECTION G

G101

G ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION G - FUNCTIONAL LIMITATIONS AND HELPERS?

1. NEVER

2. A FEW TIMES

3. MOST OR ALL OF THE TIME

4. THE SECTION WAS DONE BY A PROXY REPORTER