What’s New in Version J?

Important note to users who downloaded the March 2010 release of Version J: The most recent release (June 2010) corrects a problem found in variables related to Social Security receipt. Specifically, we corrected the variables on whether the respondent or spouse has ever received Social Security (RASSRECV, SASSRECV) and the age it was first received (RASSAGEB, RASSAGEM, SASSAGEB, and SASSAGEM). The problem originated in not properly taking into account 2008 data in the derivation of these variables, so the correction changes most cases from not receiving to receiving Social Security. This change affects roughly 930 cases for the respondent variables, and about 730 cases for the spouse variables.

Version J incorporates the Early Release V1 for 2008. It also makes adjustments and corrections. The current versions of the core data used in Version J are:

- 1992 Final V1.01
- 1993 Final V2.1
- 1994 Final V1.0¹
- 1995 Final V2.0
- 1996 Final V4.0
- 1998 Final V2.3
- 2000 Final V1.0²
- 2002 Final V2.0
- 2004 Final V1.0
- 2006 Final Release V2.0
- 2008 Early Release V1.0
- Tracker 2008 V1.0 (December 2009)
- 2008 Geographic Region Information, also known as Cross-Wave Region and Mobility File V2.0 (December 2009)
- Master ID File V5 (December 2009)

We have made the following adjustments, improvements, and corrections to the data and documentation:

- **Health Conditions, Memory related disease:** Up to Wave 9, if respondents reported a memory-related disease in a previous wave, this question was skipped. In Wave 9, this is no longer the case. All re-interviewees are now asked this question and given the opportunity to dispute previous answers. Additional detail on this variable can be found in Section B: Health: Doctor diagnosed health problems: Memory-related disease.

¹ Beginning in Version F, we drop respondents from the 1994 HRS publicly distributed files who are flagged as deceased on the Tracker file. 175 of these 176 dropped cases were actually exit interviews rather than core interviews. The exit interviews were flagged with INW2=2 in prior versions.

² We have deleted one case from the 2000 V1.0 file, who was later discovered to be a roommate rather than a partner, according to HRS (January 28, 2005 Data Alert). This case was included in the early release of 2002 but dropped in the final release. We have also changed the HHIDPN for one case from 75573041 to 75573010 according to HRS (November 21, 2005 Data Alert), and adjusted the appropriate spouse ID.
- **Health Conditions, Doctor diagnosed health problems:** We made some corrections to RwCONDEF and RwCONDSD. RwCONDS is the count of the onset of new individual conditions since the last interview to which R responded. RwCONDSF counts the number of values that were changed due to disputes. RwCONDE gives the number of conditions a doctor has ever told the respondent they have. RwCONDEF counts how many individual condition reports in the sum were changed because of disputes. The correction decreases the number of conditions that changed due to disputes. Please see Appendix A” for a table that describes the number of cases, by wave, that changed as a result of this improvement to the code.

- **Disability Flag:** We have noticed that Social Security disability reported in the HRS Disability section is not always reported in the Assets and Income section and vice versa. We now include a variable in this dataset called RADISABF that quantifies and explains these differences. A detailed description of this new variable can be found in Section E: Social Security.

- **Pension in Current Job:** In 2008, the Pension section questionnaire was rewritten. The skip patterns are a lot less complicated and we also collect less information than in previous waves. Now everyone is asked if they have a pension at the beginning of the section and so we no longer need RwJCPENF (Further info on JCPEN) as there is only one way R is asked this question. We are creating two new sets of variables: R9PTYPD1-4 (Current pension type in detail #1-4) and R9PTYPF1-4 (Does pension type match detail? #1-4). R9PTYPD1-4 tells us what R’s employer calls the pension plan. R9PTYPF1-4 tells us if R can correctly match R9PTYP1 to R9PTYPD1. In other words, if R says his employer calls his plan a 401K plan, does R also say his pension plan is a DC plan? A detailed description of these new variables can be found in Section F: Pension

- **Retirement Variables:** In 2008, the following variables are not available because the questions were not asked: R9INHER: R Prob inheritance nxt 10 yr; R9FINPLN: R Financial planning horizon; R9RISK: R Income Risk Aversion; R9RISK6: R Income Risk Avers/6-categ.

- **Miscellaneous:** Small corrections have been made to income and asset imputations. Specifically, we made some improvements to the macro that performs bracket imputations. The logistic regression that is run in this step models the probability of attaining a particular bracket level. For this to work appropriately, the bracket levels in the model must be ordered from lowest to highest. This was not occurring for households with no financial respondent. We also changed the manner in which receipt (or “ownership”) of lump sums during the last calendar year is assigned. Previously, we had been setting cases to “No income” when the year of the lump sum payment was unknown. However, we now set them to “Don’t know ownership”. The result is that these cases will be
eligible for ownership imputation, though looking over past waves ownership is rarely if ever assigned.

We have also revised Appendix A in this document, which lists details of special cases and effects of changes and corrections.

The RAND/HRS data project is committed to producing high quality data for analysis. To this end, we have employed many innovative programming and quality assurance techniques including paired peer programming, standardized macros, and independent review. If you do, however, notice any undocumented discrepancies or apparent problems with the data, please let us know by e-mailing us (randhrshelp@rand.org).

Though we have attempted to derive measures that are consistent across waves, the underlying HRS data do not always allow this. Some of the native inconsistencies are present in our derived measures, but should be documented in detail in this codebook. Before using any measure comparatively across interview years, please be sure to read the variable description in this codebook carefully, particularly the sections on “How Constructed” and “Cross Wave Differences in the Original HRS Data” that are included for each variable. If there are cross wave differences that we have not documented, please let us know (randhrshelp@rand.org).

In the future we plan to implement the following changes and additions:

- **Total Medical Expenditure Brackets:** In Version F we added the reported total medical expenditure brackets as categorical variables for Waves 3 to 6 (RwTOTMB), and a version of this variable that imputes complete brackets when needed (RwTOTMBI). The question about total medical expenditures is not asked from wave 7 and forward. The continuous total medical expenditures are imputed in this version of the RAND HRS up to Wave 6, but we plan to drop these imputations in future releases due to concerns about the quality of the imputations based on limited information. We will continue to impute out-of-pocket expenses.

- **Improvements to Income and Wealth Imputations:** *The improvements to the income and wealth imputations made for Version J have been applied only in Wave 9.* We examined trends over time to assess the compatibility with imputations in earlier waves, and found that the trends (e.g., increases or decreases in income and wealth components) made sense. However, we plan to implement these and other improvements to prior waves in coming releases.

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