

# **English Longitudinal Study of Ageing**

**Wave Six Interview Questionnaire – 2012 to 2013**

**Prepared by NatCen**

**Version 3.0 MARCH 2014**

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# English Longitudinal Study of Ageing

Wave Six Interview Questionnaire – 2012-2013

## 1 HOUSEHOLD DEMOGRAPHICS MODULE (HD)

### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

#### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

#### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

#### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or “press 1 and continue” variables) – see User Guide for more information.

#### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

#### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## HOUSEHOLD DEMOGRAPHICS MODULE (HD)

*IF (interviewing at new household) DHSameH is prefilled 'No' [HHNo >1, DHSameH:=2]*

*ELSE*

### **DHSAMEH \***

ASK or CODE: Are you living at the same address as when we last interviewed you [^date of last interview]?

- 1 Yes
- 2 No

END OF FILTER

### **DHINT \*@**

(As you know) this is a study about the health and lifestyles of people aged 50 and over.

[^BLANK/During the interview, some of the questions you are asked will be new to you and others will check or update information that we asked about last time. This is because we are interested in understanding what has stayed the same and what has changed.]

I would like to begin by checking our details about who lives in this household.

INTERVIEWER: Enter 1 to continue.

Range: 1..1

*IF Number of people who have moved out in previous waves > 0 [NOFMov > 0]*

### **DHBACK \*@**

Before beginning the interview, I just need to check whether there have been changes in who lives in this household.

Our records show that the following people have previously lived in this household.

Have any of them returned to the household? Do any of them live here now?

CODE ALL THAY APPLY.

- 01 [^<Name of Mover1>]
- 02 [^<Name of Mover2>]
- 03 [^<Name of Mover3>]
- 04 [^<Name of Mover4>]
- 05 [^<Name of Mover5>]
- 06 [^<Name of Mover6>]
- 07 [^<Name of Mover7>]
- 08 [^<Name of Mover8>]
- 09 [^<Name of Mover9>]
- 10 [^<Name of Mover10>]
- 11 [^<Name of Mover11>]
- 12 [^<Name of Mover12>]
- 96 None of these

**[code maximum 12 out of 13 possible responses]**

**[CHECK DH1-DH2]**

END OF FILTER

## LOOP FOR EACH PERSON IN HOUSEHOLD

(This will be asked of each person in the household following the routings below)

*IF (Household size is different from last interview) OR (Whether person still lives here = Yes) OR (Person has moved back in household) AND (Whether anyone else lives here=Yes)  
[P1 <>HHPrev OR DHName=1 OR P1=DhBack AND DhElse=1]  
(P1 and HHPrev are computed variables therefore not included in archive data)*

*IF whether died = Yes [Dead =1]*

*(Dead is from feedforward data)*

**DHDIEDC @**

INTERVIEWER: Our records show that [^Name] has died. Is this correct?

Only ask respondent if you don't know

1 Yes

2 No

END OF FILTER

*IF whether confirmed died = Yes DhName is prefilled 'No' [DHDiedC = 1, DHName=2]*

**DHNAME \*@**

Does [^<First name from last interview>][^BLANK/still] live here?

INTERVIEWER: If respondent is in an institution code 'No'."

1 Yes

2 No

END OF FILTER

*IF (whether still lives here = No) AND (confirmed died <> Yes)*

*[DhName = 2 AND DHDiedC <> 1]*

**DHWWHAT \*@**

May I ask what has happened to [^<First name from last interview>]?

1 Deceased

2 Living elsewhere - relationship ended

3 Living elsewhere - moved into a nursing/residential home

4 Living elsewhere - other reason

5 Member of the core household

*(Note code 5 is only valid for new households)*

**[CHECK DH3]**

**[CHECK DH18]**

*IF reason for not living here = Deceased or confirmed died = yes*

*[DhWhat = 1 or DHDiedC = 1 ]*

**DHEIINT \*@**

I am sorry to hear that [^<First name from last interview >] has passed away. I just need to ask a few questions to check that we have the correct information about him/her.

INTERVIEWER: Press 1 and <Enter> to continue.

Range: 1..1

END OF FILTER

END OF FILTER

*IF QHD.QAHD.P.PConfirm = No [PConfirm = 2]*

*(PConfirm is a computed variable therefore not included in archived data)*

**DHNN \*@**

INTERVIEWER: Enter correct first name.

String: 20

*ELSE IF QHD.QAHD.P.PConfirm = Yes [PConfirm = 1]*

*(PConfirm is a computed variable therefore not included in archived data)*

*IF (whether still lives here= Yes) OR (reason for not living here = Living elsewhere- moved to elsewhere- moved to a nursing/residential home, Deceased)*

*[DhName = 1 OR DhWhat = 3, 1]*

**DHNC \*@**

INTERVIEWER: ASK OR CODE: Is the first name ([^<First name from last interview>]) correct?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = living elsewhere – moved to a nursing/residential home, Deceased)*

*[DhName = 1 OR DhWhat = 3, 1]*

*IF Sex from last interview = RESPONSE [Sex (Last int) = RESPONSE]*

**DHSEXC \*@**

ASK OR CODE: Can I just check, [^is/was] [^<correct first name>] [^sex from last interview]?

- 1 Yes
- 2 No

END OF FILTER

*IF (correct sex check = No) OR (Sex from last interview <> RESPONSE)*

*[DhSexC = 2 OR Sex (Last int) <> RESPONSE]*

**DHSEX \***

INTERVIEWER: Ask or code [^<correct first name>]'s sex.

- 1 Male
- 2 Female

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = Living elsewhere, Deceased)*

*[DhName = 1 OR DhWhat = 3, 1]*

*IF date of birth from last interview = RESPONSE [DoB (Last int) = RESPONSE]*

**DHDOBC \***

Can I just check, [^is/was] [^<correct first name>]'s date of birth [^<date of birth from last interview>]?

- 1 Yes
- 2 No

END OF FILTER

*IF (Date of birth check = No) OR (DoB from last interview <> RESPONSE)  
[DhDoBC = 2 OR DoB (Last int) <> RESPONSE]*

**DHDOB \*@**

What [^is/was] [^<correct first name>]'s date of birth?

**[CHECK DH4-DH5]**

**[CHECK DH19-DH20]**

END OF FILTER

*IF date of birth <> RESPONSE [DhDob <> RESPONSE]*

*IF age at last birthday = DK [DhAge = DK]*

**DHEAG \*@**

Is [^<correct first name>] ... READ OUT ...  
1 ... Under 16  
2 16 to 29  
3 30 to 49  
4 50 to 69  
5 70 to 89  
6 or, 90 or over?

END OF FILTER

END OF FILTER

END OF FILTER

*IF (whether still lives here = Yes) AND (age at last birthday >= 16)  
[DhName = 1 AND DhAge >= 16]*

**DHWORK \***

Last week was [^<correct first name>] in paid employment including being away temporarily from a job [^he/she] would normally be doing?

- 1 Yes
- 2 No

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = Living elsewhere– moved to a nursing/residential home, Deceased)*

[DhName = 1 OR DhWhat = 3, 1]

LOOP FOR EACH OTHER PERSON IN HOUSEHOLD:= 1 TO 16

*IF Feed forward Relationship to other HH member = RESPONSE [R = RESPONSE]  
(R is a feed forward variable)*

**DHRC \***@

SHOW CARD A1

And, [^is/was] [^<correct first name>]s [^husband/wife/partner/etc.]?

1 Yes

2 No

END OF FILTER

*IF (whether previous relationship confirmed = No) OR (Feed forward Relationship to other HH member <>RESPONSE)  
[DhRC = 2 OR R <> RESPONSE]*

**DHR \***

SHOW CARD A1

What is [^<correct first name>]'s relationship to [^<other HH member>]. Please choose a number from this card. INTERVIEWER: Code 2 for Civil Partners.

01 Husband/Wife

02 Partner/cohabitee

03 Natural son/daughter

04 Adopted son/daughter

05 Foster son/daughter

06 Step son/daughter/child of partner

07 Son/daughter-in-law

08 Natural parent

09 Adoptive parent

10 Foster parent

11 Stepparent/parent's partner

12 Parent-in-law

13 Natural brother/sister

14 Half-brother/sister

15 Step-brother/sister

16 Adopted brother/sister

17 Foster brother/sister

18 Brother/sister-in-law

19 Grandchild

20 Grandparent

21 Other relative

22 Other non-relative

[Don't Know and Refusal are not allowed]

**[CHECK DH6-DH8]**

**[CHECK DH22-D23]**

END OF FILTER

END OF FILTER

*IF (Know to have died before this wave = Yes) OR (reason for not living here = deceased)  
[Dead = 1 OR DhWhat = 1]*

**DHDEAD \*@**

[^When did [^<correct first name>] die/We understand that [^<correct first name>]  
as died. May I ask when he/she died?]?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK DH9-DH10]**

**[CHECK DH24-DH25]**

*IF year of death = RESPONSE [DhDead = RESPONSE]*

**DHMON \*@**

(When did [^<correct first name>] die?)

INTERVIEWER: Enter the month at this question.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

13 Winter (start of year)

14 Spring

15 Summer

16 Autumn

17 Winter (end of year)

*IF month of death = RESPONSE [DhMonD = RESPONSE]*

**DHDAY \*@**

(When did [^<correct first name>] die?)

INTERVIEWER: Enter the day at this question.

Range: 1..31

**[CHECK DH11-12]**

**[CHECK DH26]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF (reason for not living here = living elsewhere- relationship ended, living elsewhere- moved to a nursing/residential home, living elsewhere- other reason) OR reason for not living here = NONRESPONSE*  
[DhWhat = 2 , 3, 4 OR DhWhat = NONRESPONSE]

**DHLEFTY \*@**

When did [^<correct first name>] move out of this household?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**DHLEFTM \*@**

(When did [^<correct first name>] move out of this household?

INTERVIEWER: Enter the month at this question.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

13 Winter (start of year)

14 Spring

15 Summer

16 Autumn

17 Winter (end of year)

**[CHECK D13-D14]**

**[CHECK D27-D28]**

*IF (Sample status is core member at last interview = Yes) OR (Sample status is partner at last interview = Yes)*

*[ELSA (FFW) = 1 OR Partner (FFW) = 1]*

*IF reason for not living here = Living elsewhere- relationship ended, Living elsewhere- other reason*  
[DhWhat = 2, 4]

**DHARFB \*@**

INTERVIEWER: This is a split household. Start ARF B and attempt to find follow-up address for them.

1. Press 1 and <Enter> to continue.

*IF (reason for not living here = living elsewhere - relationship ended, living elsewhere - moved to a nursing/residential home, living elsewhere - other reason)*  
[DhWhat = 2 , 3, 4]

**DHMOV \*@**

We may need to collect some more details about [^<correct first name>] but we will come back to this later.

1. Press 1 and <Enter> to continue.

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

LOOP FOR EACH NEW PERSON IN THE HOUSEHOLD AND FOR EACH PERSON WHO HAS RETURNED TO THE HOUSEHOLD

**DHJOINY \*@**

When did [^<correct first name>] move[^BLANK/back] into this household?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK DH15]**

**[CHECK DH29]**

**DHJOINM \*@**

(When did [^<correct first name>] move [^BLANK/back] into this household?)

INTERVIEWER: Enter the month at this question.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

13 Winter (start of year)

14 Spring

15 Summer

16 Autumn

17 Winter (end of year)

**[CHECK DH16-DH17]**

**[CHECK DH30-DH31]**

END OF FILTER

END OF FILTER

END OF FILTER

**DHELSE \*@**

Does anyone else live here [^BLANK/now]? [^INTERVIEWER: If the new entrant is a returner who was listed at the beginning of the interview, don't answer this question but scroll back to DhBack and code the relevant person number]

1 Yes

2 No

[Don't Know and Refusal are not allowed]

*IF (anyone else lives here = Yes) AND ((Number of children outside household (last interview) – Number of children covered in child grid) > 0)*

*[DhElse = 1 AND ChTot -ChCov(Last int) > 0]*

*(ChTot -ChCov are computed variables therefore not included in archived data)*

**DHELSEC \*@**

Is this person a child of someone who lives here [^BLANK/or who used to live here]?

1 Yes

2 No

*IF whether is child of someone living here = Yes [DhElseC = 1]*

**DHELSCY \*@**

INTERVIEWER: Check if it is any of these children recorded at the previous interview.

CODE ONE ONLY.

01 [^<Name of child1>]

02 [^<Name of child2>]

03 [^<Name of child3>]

04 [^<Name of child4>]

05 [^<Name of child5>]

06 [^<Name of child6>]

07 [^<Name of child7>]

08 [^<Name of child8>]

09 [^<Name of child9>]

10 [^<Name of child10>]

11 [^<Name of child11>]

12 [^<Name of child12>]

13 [^<Name of child13>]

14 [^<Name of child14>]

15 [^<Name of child15>]

16 [^<Name of child16>]

17 [^<Name of child17>]

18 [^<Name of child18>]

19 [^<Name of child19>]

20 [^<Name of child20>]

96 No, it is someone else

**[CHECK DH32-DH38]**

END OF FILTER

END OF FILTER

*IF ((Sample status is core member at last interview = Yes) OR (Sample status is partner at last interview = Yes)) AND (reason for not living here = living elsewhere - moved into a nursing/residential home) [(ELSA (Wave 1) = 1 OR Partner (Wave 1) = 1) AND (DhWhat = 3)]*

**DHMI<sup>PRX</sup> \*@**

(You told me that has moved into a nursing home/residential home). We are interested in understanding the changes that happen in people's lives, so we'd like to invite [^name] to continue to participate in this survey.

Do you think that will be able to answer the questions on own behalf if we were to approach in the future?

- 1 Yes
- 2 No
- 3 Don't know

*IF whether participant could have institution interview in person = No [DhMiPrx = 2]*

**DHMI<sup>PWP</sup> \*@**

Is there someone who could answer on behalf in the future?

- 1 Yes
- 2 No

*IF whether someone could do proxy institution interview = Yes [DhMiPWP = 1]*

**DHMI<sup>PWH</sup> \*@**

INTERVIEWER: Who could answer on behalf of [Name]?

Priority order is proxy nomination/spouse/partner, next-of-kin, stable address, care home manager.

- 01 [^<Name of Person1>]
- 02 [^<Name of Person2>]
- 03 [^<Name of Person3>]
- 04 [^<Name of Person4>]
- 05 [^<Name of Person5>]
- 06 [^<Name of Person6>]
- 07 [^<Name of Person7>]
- 08 [^<Name of Person8>]
- 09 [^<Name of Person9>]
- 10 [^<Nameof Person10>]
- 11 [^<Nameof Person11>]
- 12 [^<Nameof Person12>]
- 13 [^<Nameof Person13>]
- 14 [^<Nameof Person14>]
- 15 [^<Nameof Person15>]
- 16 [^<Nameof Person16>]

97 : Someone else

INTERVIEWER: Please record details on ARF at section C.

Range: 1..97

**[CHECK DH39-DH40]**

END OF FILTER  
END OF FILTER  
END OF FILTER

**DHRESP \* @**

INTERVIEWER: Code the main person who answered the Household Grid.  
CODE ONE ONLY.

01 [^<Name of Person1>  
02 [^<Name of Person2>  
03 [^<Name of Person3>  
04 [^<Name of Person4>  
05 [^<Name of Person5>  
06 [^<Name of Person6>  
07 [^<Name of Person7>  
08 [^<Name of Person8>  
09 [^<Name of Person9>  
10 [^<Nameof Person10>  
11 [^<Nameof Person11>  
12 [^<Nameof Person12>  
13 [^<Nameof Person13>  
14 [^<Nameof Person14>  
15 [^<Nameof Person15>  
16 [^<Nameof Person16>  
97 : Not a Household Member

Range: 1..97

[Don't Know and Refusal are not allowed]

**[Responses are recoded in variable HHRESP]**

**DHROTH @**

INTERVIEWER: Did anyone else help to answer the Household Grid?  
CODE ALL THAT APPLY.

**[CHECK DH41]**

*IF Person who answered HH grid = 97 [DhResp = 97]*

**DHWARN \*@**

INTERVIEWER: The Household Questionnaire should only be answered by a non-household member if all household members eligible for interview are incapacitated.

1. Press <1> and <Enter> to continue.

**[CHECK DH42-DH43]**

END OF FILTER

LOOP FOR EACH PERSON IN THE HOUSEHOLD WHO HAD A CHILD FROM PREVIOUS INTERVIEW

*IF child's first name from last interview = RESPONSE [Name = RESPONSE]*

**DHCGN \*@**

Our records show that when we last interviewed [^you/^Name], [^you/he/she] had a child called [^<child's first name>], [^whose date of birth is [^date of birth from last interview] /who was aged [^<age from last interview>]]. Are these details correct?

- 1 Yes - Details correct
- 2 No - Some details need changing
- 3 Yes - Child has since died
- 4 No - Respondent never had this child

ELSE

**DHCH \*@**

Do you have any [^BLANK/other] children who do not live here [^BLANK/ and who have not been mentioned already]?

IF ASKED: Step, foster and adoptive children can be included.

- 1 Yes
- 2 No

**[CHECK DH44]**

*IF whether has children not living here = Yes [DhCh = 1]*

**DHNCH \*@**

In total, how many [^BLANK/other] living children do you have?

IF ASKED: Step, foster and adoptive children can be included.

Range: 0..20

END OF FILTER

END OF FILTER

END OF FILTER

**LOOP FOR EACH CHILD OF HOUSEHOLD MEMBER**

*IF ((child's details check= Correct, Change some) AND (whether have children who do not live here <> No) )*

*[DhCgN = 1, 2 AND DhCh <> 2]*

*IF (Child's name = RESPONSE) AND (child's details check<> Correct)  
[Name = RESPONSE AND DhCgN <> 1]*

**DHNC \*@**

INTERVIEWER: ASK OR CODE: Is the first name ([^<child's first name from last interview>]) correct?

- 1 Yes
- 2 No

END OF FILTER

*IF (child's name check = No) OR (Child's name <> RESPONSE)  
[DhNC = 2 OR Name <> RESPONSE]*

**DHCNA \*@**

What is the first name of [^this/the oldest/the next] child?

String: 20

*IF (Sex from last interview = RESPONSE) AND (child's details check <> Correct)  
[Sex(Last int) = RESPONSE AND DhCgN <> 1]*

**DHSEXC \*@**

ASK OR CODE: Can I just check, is [^<first name of child>] [^male/female]?

- 1 Yes
- 2 No

END OF FILTER

*IF (child's sex check = No) OR (Sex from last interview <> RESPONSE)  
[DHSExC = 2 OR Sex <> RESPONSE]*

**DHCS \***

INTERVIEWER: Code or ask [^<first name of child>]'s sex.

- 1 Male
- 2 Female

*IF (DoB from last interview = RESPONSE) AND (child's details check <> Corr)  
[DoB (Last int)= RESPONSE AND DhCgN <> 1]*

**DHDOBC \***

Can I just check, [^is/was] [^<first name of child>]'s date of birth [^<date of birth from last interview >]?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (child's date of birth check = No) OR (DoB from last interview <> RESPONSE)  
[DHDoBC = 2 OR DoB (Last int) <> RESPONSE]*

**DHCDB \*@**

What is [^<first name of child>]'s date of birth?

*IF child's date of birth = NONRESPONSE [DhCDB = NONRESPONSE]*

**[CHECK DH45-DH48]**

**DHCAG \***

What was [^<first name of child>]'s age last birthday?

Range: 0..120

LOOP FOR EACH CHILD OUT OF THE HOUSEHOLD FOR EACH HOUSEHOLD MEMBER STILL IN HOUSEHOLD

*IF child's relationship to household member from last interview = RESPONSE  
[CRel (Last int) = RESPONSE]*

**DHRC \* @**

And, is [^<first name of child>] [^your/[<sup>name's</sup>]] [^husband/wife/partner etc.]?

- 1 Yes
- 2 No

END OF FILTER

*IF (check relationship to HH member = No) OR (child's relationship to household member from last interview <> RESPONSE)  
[DHRC = 2 OR CRel (Last int) <> RESPONSE]*

**DHCR \*@**

SHOW CARD A1.

What is [^<first name of child>]'s relationship to [^you/ [^name]]? Please choose a number from this card.

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative

[Don't Know and Refusal are not allowed]

**[CHECK DH49-DH58]**

END OF FILTER

*IF Total Eligible for interview after the household grid = 1 [EligBT = 1]*

**DHANYPX \* @**

INTERVIEWER: [^name] [^is/are] eligible for interview. [^Does he/she/Do either/any of them]

need a proxy interview?

- 1 Yes
- 2 No

*IF (Any respondents need a proxy = Yes) AND (Total eligible for interview after the household grid = 2)*

*[DhAnyPx = 1 AND EligBT = 2]*

**DHPROXY \*\*@**

INTERVIEWER: Code person numbers of any eligible respondents incapable of interview.

NOTE: This will generate a Proxy interview.

- 01 [^Person number 1]
- 02 [^Person number 2]
- 03 [^Person number 3]
- 04 [^Person number 4]
- 05 [^Person number 5]
- 06 [^Person number 6]
- 07 [^Person number 7]
- 08 [^Person number 8]
- 09 [^Person number 9]
- 10 [^Person number 10]
- 11 [^Person number 11]
- 12 [^Person number 12]
- 13 [^Person number 13]
- 14 [^Person number 14]
- 15 [^Person number 15]
- 16 [^Person number 16]

***[code maximum 16 out of 16 possible responses]***

***[CHECK DH59]***

**DHPXWHY**

INTERVIEWER: Why does [^<name of eligible respondent incapable of interview>] need a proxy interview?

- 1 Physical impairment
- 2 Mental impairment
- 3 In hospital or temporary care
- 4 Refused a personal interview
- 5 Other (please specify)

***[CHECK DH60-61]***

*IF reason for proxy = other [DhPxWhy = 5]*

**DHPXOTH**

INTERVIEWER: Please specify why the respondent requires a proxy interview."

STRING[40]

END OF FILTER

**DHPXM**

INTERVIEWER: Please remember to get signed consent from the proxy/ consultee on whether the respondent would be willing to participate in this interview and for agreement to do the interview on the respondent's behalf.

END OF FILTER

END OF FILTER

LOOP TO WORK OUT WHETHER TO ASK IA MODULE IN INDIVIDUAL INTERVIEW

**DHIASEP \*@**

Later in the interview, I would like to ask some questions about finances generally, for example income and savings.

Can I just check, [^do/does] each keep [^your/[^Name's]] finances totally separate from each other?

1 Yes

2 No

END OF FILTER

*IF Total Eligible for interview after DHPROXY= 2 [EligCT = 2]*

**DHNOW \*@**

INTERVIEWER: Are you about to begin a concurrent interview with [^name A and ^name B]? The order in which respondents will appear in the session would be: [^<name of person A> and ^<name of person B>]

[^BLANK/INTERVIEWER: if respondents have separate finances - be sure they are willing to answer questions about their finances in front of each other before interviewing them together]

1 Yes

2 No

[Don't Know and Refusal are not allowed]

*IF INTERVIEWER: Are you about to begin concurrent interview = Yes [DhNow = 1]*

**DHSURY \* @**

INTERVIEWER: Code 1 here to confirm that Individual Session one will be a concurrent interview with [^name A and ^name B] The order in which respondents will appear in the session will be : [^<name of person A> and ^name<name of person B>]

Note : This cannot then be changed.

1 Correct

2 Not correct

[Don't Know and Refusal are not allowed]

**[CHECK DH62-DH63]**

END OF FILTER

END OF FILTER

LOOP FOR EACH RESPONDENT ELIGIBLE TO INTERVIEW

*IF INTERVIEWER: Are you about to begin concurrent interview > Yes [DhNow > 1]*

*IF whether keep finances separate = No [DhlaSep = 2]*

**DHIAWHO \* @**

INTERVIEWER: 'I will only need to ask one of you the questions about your finances.

Which of you would be most able to answer these questions?'

CODE ONE ONLY.

1 [^<Name of person A>]

2 [^<Name of person B>]

[Don't Know and Refusal are not allowed]

END OF FILTER

END OF FILTER

END OF FILTER

*IF Total eligible for interview after DHPROXY > 1 [EligCT > 1]*

**DHHOU \* @**

INTERVIEWER: Some questions in the interview are about your household's housing and housing finances. I will only need to ask these to one person. [^BLANK/Last time we interviewed you, [^<name of person>] answered these questions] Which of you would be the most able to answer questions about housing [^BLANK/this time]?

CODE ONE ONLY.

Range: 1..97

**[CHECK DH64-DH65]**

END OF FILTER

## ***HD Module checks***

**DH1 DBACK**

*IF names of people who have moved back in = none of these [DhBack = 96]*

*CHECK: (names of people who have moved back in = none of these) AND (names of people who have moved back in = at least one other answer)*

*[DhBack = 96 AND DhBack = [1...12]]*

'None of these' is an exclusive code for this question.

END CHECK

END OF FILTER

**DH2 DBACK**

LOOP FOR myloop:= 1 TO 12

*IF names of people who have moved back in = myloop [DhBack = 1...12]*

*CHECK: what has happened to person = living elsewhere [DHWhat = 2...4]*

*^myloop is not a valid person number.*

```

    END CHECK
END OF FILTER

DH3 DHWHAT
IF reason for not living here = CoreHH [DhWhat = 5]

    CHECK: (Household Number > 1) INVOLVING (DhWhat) [HHNo > 1 INVOLVING DhWhat]

    CHECK: (> 1) INVOLVING (reason for not living here)
          [HHNo > 1 INVOLVING DhWhat]

        Code 5 is only valid for new households.

    END CHECK
END OF FILTER

DH4 DHDOB
IF date of birth = RESPONSE [DhDob = RESPONSE]

    CHECK: year of birth >= 1885 [DhDob.YEAR >= 1885]

    INTERVIEWER: Are you sure? The year is earlier than 1885!

    END CHECK
END OF FILTER

DH5 DHDOB
IF date of interview = RESPONSE [IntDat = RESPONSE]

    CHECK: date of interview >= date of birth [IntDat >= DhDob]

    INTERVIEWER: This date is in the future (^dhdob)! Please change!

    END CHECK
END OF FILTER

DH6 DHR
CHECK: relationship to other household members = this code not used [DhR = 96]

    Code 96 is not valid for this question.

    END CHECK

DH7 DHR
IF relationship to other household members = [Spouse / Partner / Cohabitee] [DhR = 1, 2 ]

    CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)
          [DhAge > 15 OR DhEAg = LE16]

```

Are you sure? ^DhNN is only ^DHAge years old. Please check.  
END CHECK  
END FILTER

#### DH8 DHR

*IF relationship to other household members = natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent*  
[DhR = 8...12, 20]

CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)  
[DhAge > 15 OR DhEAg = LE16]  
  
You've coded ^DhNN as a parent (inc. foster/in-law/step) or a grandparent, but  
^heshe is less than 16 years old. Please check ^DhNN's age.

END CHECK

END OF FILTER

#### DH9 DHDEAD

#### DH10 DHDEAD

*IF year of previous interview = RESPONSE [IntYr = RESPONSE]*

CHECK: year of death >= year of previous interview (wave 1) [DhDead >= IntYr]  
  
INTERVIEWER: Individual was recorded as alive at the previous interview in  
^HW1.IDol[person].IntYr. Please check date of death.

END CHECK

END OF FILTER

#### DH10 DHDEAD

CHECK: year of death >= 1998 [DhDead >= 1998]  
  
INTERVIEWER: Individual was recorded as alive at HSE interview.  
Please check date of death.

END CHECK

END OF FILTER

#### DH11 DHDAY

#### DH12 DHDAY

*IF date of interview = RESPONSE AND approximate date of death = RESPONSE*  
[IntDat = RESPONSE) AND (DateOfDeath = RESPONSE)]

*IF month of death = January...December [DhMon = January..December]*  
  
CHECK: (date of interview >= approximate date of death) [IntDat >= DateOfDeath]

INTERVIEWER: This date is in the future (^dhmon ^dhdead)! Please change!  
END CHECK  
ELSE  
*CHECK: (date of interview >= approximate date of death) ([IntDat >= DateOfDeath)  
INVOLVING (DhMon)]*  
INTERVIEWER: From the season specified this date appears to be in the future  
(^dhmon ^dhdead). Please check and change if necessary.  
END CHECK  
END OF FILTER  
END OF FILTER

**DH13 DHLEFTM**

**DH14 DHLEFTM**

*IF date of interview = RESPONSE [IntDat = RESPONSE]*

*CHECK: date of interview >= date moved out of household  
[IntDat >= TODATE (DhLeftY, DhLeftM.ORD, 1)]*  
INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!  
END CHECK  
*CHECK: date of interview >= date moved out of household  
[IntDat >= TODATE (DhLeftY, DhLeftM.ORD, 1)]*  
INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!  
END CHECK  
END OF FILTER

**DH15 DHJOINY**

*IF (year moved into household = RESPONSE) AND (year of interview = RESPONSE)  
[DhJoinY = RESPONSE AND IntYr = RESPONSE]*

*CHECK: year moved into household >= year of interview [DhJoinY >= IntYr]*  
INTERVIEWER: This date seems to be before the previous interview.  
Please change!  
END CHECK  
END OF FILTER

**DH 16 DHJOINM**

**DH 17 DHJOINM**

*IF (year moved into household = RESPONSE) AND (month moved into household =*

*RESPONSE) [DhJoinY = RESPONSE AND DhJoinM = RESPONSE]*

*CHECK: date of interview >= date moved into household  
[IntDat >= TODATE (DhJoinY, DhJoinM.ORD, 1)]*

INTERVIEWER: This date is in the future (^DhJoinM ^DhJoinY)! Please change!

END CHECK

*CHECK: date of previous interview <= date moved into household  
[TODATE (IntYr, IntMth, IntDay) <= TODATE (DhJoinY, DhJoinM.ORD, 28)]*

INTERVIEWER: This date is before the previous interview. Please check!

END CHECK

END OF FILTER

### **DH18 DHWHAT**

*IF reason for not living here = CoreHH [DhWhat = 5]*

*CHECK: (Household Number > 1) INVOLVING (reason for not living here)  
[HHNo > 1 INVOLVING DhWhat]*

Code 5 is only valid for new households.

END CHECK

END OF FILTER

### **DH19 DHDOB**

*IF date of birth = RESPONSE [DhDob = RESPONSE]*

*CHECK: year of birth >= 1885 [DhDob.YEAR >= 1885]*

INTERVIEWER: Are you sure? The year is earlier than 1885!

END CHECK

END OF FILTER

### **DH20 DHDOB**

*IF date of interview = RESPONSE [IntDat = RESPONSE]*

*CHECK: date of interview >= date of birth [IntDat >= DhDob]*

INTERVIEWER: This date is in the future (^dhdob)! Please change!

END CHECK

END OF FILTER

**DH21 DHR**

*CHECK: relationship to other household members = this code not used [DhR = 96]*

Code 96 is not valid for this question.

END CHECK

**DH22 DHR**

*IF relationship to other household members = [Husband / Wife / Partner / Cohabitee]  
[DhR = 1,2 ]*

*CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)  
[DhAge > 15 OR DhEAg = LE16]*

Are you sure? ^DhNN is only ^DHAge years old. Please check.

END CHECK

END OF FILTER

**DH23 DHR**

*IF relationship to other household members = [natural parent, adoptive parent, foster parent,  
step-parent, parent's partner, parent-in-law, grandparent]  
[DhR = 8...12, 20]*

*CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)  
[DhAge > 15 OR DhEAg = LE16]*

You've coded ^DhNN as a parent (inc. foster/in-law/step) or a grandparent, but  
^heshe is less than 16 years old. Please check ^DhNN's age.

END CHECK

END OF FILTER

**DH24 DHDEAD****DH25 DHDEAD**

*IF year of previous interview = RESPONSE [FFWIntYr = RESPONSE]*

*CHECK: year of death >= year of previous interview [DhDead >= FFWIntYr]*

INTERVIEWER: Individual was recorded as alive at the previous interview in  
^FFWIntYr. Please check date of death.

END CHECK

ELSE

*CHECK: year of death >= 1998 [DhDead >= 1998]*

INTERVIEWER: Individual was recorded as alive at HSE interview.  
Please check date of death.

END CHECK

END OF FILTER

**DH26 DHDAY**

*IF date of interview = RESPONSE [IntDat = RESPONSE] AND date of death = RESPONSE  
[DateOfDeath = RESPONSE]*

*CHECK: (date of interview >= approximate date of death) [IntDat >= DateOfDeath]*

INTERVIEWER: This date is in the future (^Dhmon ^Dhdead)! Please change!

END CHECK

END OF FILTER

**DH27 DHLEFTM**

**DH28 DHLEFTM**

*IF date of interview = RESPONSE [IntDat = RESPONSE]*

*CHECK: date of interview >= date moved out of household  
[IntDat >= TODATE (DhLeftY, DhLeftM.ORD, 1)]*

INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!

END CHECK

*CHECK: date of interview < date moved out of household  
[IntDat < TODATE (DhLeftY, DhLeftM.ORD, 1)]*

INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!

END CHECK

END OF FILTER

**DH29 DHJOINY**

*IF (year moved into household = RESPONSE) AND (year of interview = RESPONSE)  
[DhJoinY = RESPONSE AND FFWIntYr = RESPONSE]*

*CHECK: year moved into household >= year of interview [DhJoinY >= FFWIntYr]*

INTERVIEWER: This date seems to be before the previous interview.  
Please change!

END CHECK

END OF FILTER

**DH30 DHJOINM**

**DH31 DHJOINM**

*IF (year moved into household = RESPONSE) AND (month moved into household =RESPONSE)  
[DhJoinY = RESPONSE AND DhJoinM = RESPONSE]*

*CHECK: date of interview >= date moved into household*

*[IntDat >= TODATE (DhJoinY, DhJoinM.ORD, 1)]*

INTERVIEWER: This date is in the future (^DhJoinM ^DhJoinY)! Please change!

END CHECK

*CHECK: date of previous interview > date moved into household  
[TODATE (IntYr, IntMth, IntDay) > TODATE (DhJoinY, DhJoinM.ORD, 28)]*

INTERVIEWER: This date is before the previous interview. Please check!

END CHECK

END OF FILTER

### **DH32 DHELSCY**

*IF P2 > P1 [P2 > P1]*

*CHECK: (P.NumPart = [0 .. 1]) INVOLVING (P.QRel.DhR) [P[P1].NumPart = 0 , 1  
INVOLVING P[P2].QRel[P1].DhR]  
  
^P[P1].Name has more than one spouse / cohabitee. Establish who is principal  
partner.*

END CHECK

END OF FILTER

### **DH33 DHELSCY**

*IF P1 > P2 [P1 > P2]*

*IF ((relationship to other household members = spouse) AND (DhSex =  
RESPONSE)) AND (DhSex = RESPONSE)  
[DhR = 1 AND P1.DhSex = RESPONSE AND P2.DhSex = RESPONSE]  
  
CHECK: Married partners are of same sex [P1.DhSex = P2.DhSex]  
  
A married partner must be of opposite sex.*

END CHECK

END OF FILTER

### **DH34 DHELSCY**

*IF relationship to other household members = partner / cohabitee [DhR = 2]*

*CHECK: Cohabiting partners are of same sex [P1.DhSex <> P2.DhSex]  
  
A cohabiting partner is usually of opposite sex.*

END CHECK

END OF FILTER

**DH35 DHELSCY**

*IF relationship to other household members = [natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent]  
[DhR = 8...12, 20]*

*CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)  
[DhAge > 15 OR DhEAg = LE16]*

You've coded ^P[P1].Name as a parent (inc. foster/in-law/step) or grandparent, but he/she is less than 16 years old. Please check ^P[P1].Name's age.

END CHECK

END OF FILTER

**DH36 DHELSCY**

*IF (relationship to other household members = natural child, adopted child, foster child, step child of partner, child-in-law, grandchild) AND (DhAge = RESPONSE)  
[DhR = 3...7, 19 AND DhAge = RESPONSE]*

*CHECK: (child's age < respondent's age) [P1.DhAge < P2.DhAge]*

Children (inc. foster/in-law/step) and grandchildren should normally be younger than their parents/grandparents/step-parents. Please check the ages you have entered.

END CHECK

END OF FILTER

**DH37 DHELSCY**

*IF (relationship to other household members = [natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent]) AND (person's age = RESPONSE)  
[DhR = 8...12, 20 AND DhAge = RESPONSE]*

*CHECK: (parent's age >respondent's age) [P1.DhAge > P2.DhAge]*

Parents (inc. foster/in-law/step) or grandparents, are normally older than their child / grandchild / step-child. Please check the ages and relationships you've entered.

END CHECK

END OF FILTER

**DH38 DHELSCY**

*IF relationship to other household members = natural child, adopted child, foster child  
[DhR = 3...5]*

*CHECK: (number of parents <= 2) [NumParn <= 2]*

This suggests that ^P[P1].Name has more than two parents. Please check the relationship codes for ^P[P1].Name and select which one to alter.

END CHECK

END OF FILTER

### DH39 DHMIPWH

*IF details of proposed proxy institution interview respondent = RESPONSE [DhMiPWh = RESPONSE]*

*CHECK: proposed proxy interview respondent = not valid  
(DhName = RESPONSE AND DhWhat <> Deceased AND DhDiedC <> Yes AND  
DhMiPWh <> PNo) OR (DhMiPWh = 97)*

This is not a valid code. Please amend.

END CHECK

END OF FILTER

### DH40 DHMIPWH

*IF (QInstMove[myloop].DhMiPWh IN [1..16])*

*CHECK: (DHName = Yes) OR (DhWhat = LivElsM) INVOLVING (DhMiPWh)*

INTERVIEWER: This is not a valid code! Please change!

END CHECK

END OF FILTER

### DH41 DHROTH

*CHECK: IF (NotHh IN DhROth) THEN (DhROth.CARDINAL = 1)*

Code 95 is exclusive for this question.

END CHECK

### DH42 DHWARN

*IF person's number (who answered the household grid) = RESPONSE [DhResp = RESPONSE]*

*CHECK: person's number (person who answered the household grid  
[1...16, 97]) [DhResp 1...16, 97]*

INTERVIEWER: This is not a valid code! Please change!

END CHECK

END OF FILTER

### DH43 DHWARN

*IF person's number (who answered the household grid) = [1 .. 16] [DhResp = 1...16]*

*CHECK: (QAHD.P.DhName = Yes) INVOLVING (DhResp)*

[QAHD.P.DhName = Yes INVOLVING DhResp]

INTERVIEWER: This is not a household member! Please change!

END CHECK

END OF FILTER

#### DH44 DHNCH

IF number of living children = RESPONSE [DhNCh = RESPONSE]

CHECK: number of living children > 0 [DhNCh > 0]

INTERVIEWER: Please enter the number of children outside the household or change DhCh to 'No' (code 2)

END CHECK

END OF FILTER

#### DH45 DHCDB

IF respondent's date of birth = RESPONSE [DMDob = RESPONSE]

CHECK: child's date of birth > parent's date of birth [DhCDB > DMDob]

INTERVIEWER: Child appears to be older than parent. Please check.  
Child : ^dhcna - ^DhCDB . Parent : ^dmname[dhpa] - ^dmdob[dhpa]

END CHECK

END OF FILTER

#### DH46 DHCDB

IF respondent's date of birth = RESPONSE [DMDob = RESPONSE]

CHECK: child's date of birth > parent's date of birth [DhCDB > DMDob]

INTERVIEWER: Child appears to be older than parent. Please check.  
Child : ^dhcna - ^DhCDB . Parent : ^dmname[dhpb] - ^dmdob[dhpb]

END CHECK

END OF FILTER

#### DH47 DHCDB

IF date of interview = RESPONSE [IntDat = RESPONSE]

CHECK: date of interview >= child's date of birth [IntDat >= DhCDB]

INTERVIEWER: This date is in the future (^DhCDB)! Please change!

END CHECK

END OF FILTER

**DH48 DHCDB**

*IF (child's date of birth = RESPONSE) AND (person's date of birth = RESPONSE)  
[DhCDB = RESPONSE AND DMDob = RESPONSE]*

*CHECK: child's date of birth <> person's date of birth [DhCDB <> DMDob]*

*EDIT: 'Children outside HH' ^Dhcna has the same DoB (^DhCDB) as Person  
^edloop (^dmname[edloop]) in the Grid."*

END CHECK

END OF FILTER

**DH49 DHCR**

*IF (whether post-interview editing completed = Yes) AND (relationship to child =  
RESPONSE) [EditQre = 1 AND DHCR = RESPONSE]*

*CHECK: (relationship to child <> natural child, adopted child, foster child, step child)  
[DHCR <> 3...6]*

*EDIT: 'Children outside HH' DhCr is not codes 3-6 (Child -Natural / adopted / foster  
/ Step). Please check!*

END CHECK

END OF FILTER

**DH50 DHCR**

*IF ((child's date of birth = No) OR (CRel[chloop] <> RESPONSE))  
[(DHRC[chloop] = No) OR (CRel[chloop] <> RESPONSE) ]*

*CHECK:DhCr <> Self [DhCr[chloop] <> Self]*

*This is not a valid code - please change.*

END CHECK

END OF FILTER

**DH51 DHCR**

*IF (((idx < PP) AND (child's sex= RESPONSE)) AND (child's age at last birthday =  
RESPONSE)) AND (child's sex= RESPONSE)) AND (child's age at last birthday = RESPONSE)  
[idx < PP AND C[PP].DhCS = RESPONSE AND C[PP].DhCAg = RESPONSE  
AND C.DhCS = RESPONSE AND C.DhCAg = RESPONSE]*

*CHECK: NOT ((C[idx]. child's sex= C[PP]. child's sex) AND (child's age at last birthday g =  
C[PP]. child's age at last birthday)*

*[NOT C.DhCS = C[PP].DhCS AND C.DhCAg = C[PP].DhCAg]*

*INTERVIEWER: This person's details are the same as ^C[idx].DhCNa's. Are you  
sure it is a different person?*

END CHECK

END OF FILTER

**DH52 DHCR**

*IF ((relationship to child = spouse) AND (person's sex = RESPONSE)) AND  
(child's sex = RESPONSE)[DHCR = 1 AND DhSex = RESPONSE AND DhCS = RESPONSE]*

*CHECK: person's sex <> child's sex [DhSex <> DhCS]*

A married partner must be of opposite sex.

END CHECK

END OF FILTER

**DH53 DHCR**

*IF relationship to child = partner / cohabitee [DHCR = 2]*

*CHECK: person's sex <> child's sex [DhSex <> DhCS]*

A cohabiting partner is usually of opposite sex.

END CHECK

END OF FILTER

**DH54 DHCR**

*IF (relationship to child = natural parent, adoptive parent, foster parent, step parent,  
parent in law, grand parent)  
[DHCR = 8...12, 20]*

*CHECK: (person's age last birthday > 15) OR (age at last birthday = under 16)  
[DhAge > 15 OR DhEAg = LE16]*

You've coded ^C[PP].DhCNa as a parent (inc. foster/in-law/step) or grandparent,  
but he/she is less than 16 years old. Please check ^C[PP].DhCNa's age.

END CHECK

END OF FILTER

**DH55 DHCR**

*IF (relationship to child = natural child, adopted child, foster child, step child of partner, child-in-law, grandchild) AND (DhAge = RESPONSE)  
[DHCR = 3...7, 19 AND DhAge = RESPONSE]*

*CHECK: child's age < parent's age) [DhCAg < DhAge]*

Children (inc. foster/in-law/step) and grandchildren should normally be younger  
than their parents/grandparents/step-parents. Please check the ages you have  
entered.

END CHECK

END OF FILTER

## **DH56 DHCR**

*IF (relationship to child = natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent) AND (person's age = RESPONSE)  
[DhR = 8...12, 20 AND DhAge = RESPONSE]*

*CHECK: (child's age > person's age) [DhCAg > DhAge]*

Parents (inc. foster / in-law / step) or grandparents, are normally older than their child / grandchild / step-child. Please check the ages and relationships you've entered.

END CHECK

END OF FILTER

## **DH57 DHCR**

*IF relationship to child = natural child, adopted child, foster child [DhR = 3...5]*

*CHECK: (number of parents <= 2) [NumParn <= 2]*

This suggests that ^C[PP].DhCNa has more than two parents. Please check the relationship codes for ^C[PP].DhCNa and select which one to alter.

END CHECK

END OF FILTER

## **DH58 DHCR**

*IF (relationship to child = spouse / partner / cohabitee) [DHCR = 1, 2]*

*CHECK: (C.NumPart = [0 .. 1]) INVOLVING (C.DHCR, C[PP].DHRC[idx]) [C[PP].NumPart  
= 0 , 1 INVOLVING C[PP].DHCR[idx], C[PP].DHRC[idx]]*

^C[PP].DhCNa has more than one spouse /cohabitee. Establish who is principal partner.

END CHECK

END OF FILTER

## **DH59 DHPROXY**

*IF (person's number for proxy interview = RESPONSE) AND (myloop = DhProxy)  
[DhProxy = RESPONSE AND myloop = DhProxy]*

*CHECK: eligible for interview after grid = Yes [EligB = 1]*

^myloop is not a valid person number! please change!

END CHECK

END OF FILTER

## **DH60 DHPXWHY**

## DH61 DHPXWHY

*IF reason for proxy interview = language difficulties [DHPxWhy[myloop] = Lang]*

*CHECK: ERROR INVOLVING (DHPxWhy[myloop])*

INTERVIEWER: Please do not do a proxy interview because the ELSA sample member does not speak English well enough to do their own interview. Non-English speakers are not eligible for ELSA.

END CHECK

*ELSEIF (DHAnyPx = Yes AND EligPt = 1 AND EligB[myloop] = Yes) AND (QAHD.P[myloop].DhName = Yes)*

*CHECK: (DHPxWhy[myloop] <> MenInc)*

Please ensure you have obtained signed consent from the proxy / consultee to carry out this interview.

END CHECK

## DH62 DHSURY

*CHECK: (order of respondents in concurrent interview <> Not correct) [DhSurY <> Notc]*

INTERVIEWER: please change DhNow.

END CHECK

## DH63 DHSURY

*IF (order in which respondents will appear in the session = Correct) OR (order in which respondents will appear in the session = No) AND (order in which respondents will appear in the session = response) AND (Copy of DHNow =Empty)*

*[(DhSurY = Correct OR DhNow = No) AND DhNow = RESPONSE AND DhNowX = EMPTY]*

*CHECK: DhNow = DhNowx [DhNow = DhNowx]*

INTERVIEWER: you cannot change your answer to DHNow! Please change back to ^dhnowx.

END CHECK

END OF FILTER

## DH64 DHHOU

*IF proposed respondent for HO = RESPONSE [DHHou = RESPONSE]*

*CHECK: eligible for interview after DHProxy = Yes [EligC = 1]*

INTERVIEWER: This is not a valid person number! Please change!

END CHECK

| END OF FILTER

**DH65 DHHOU**

CHECK: (*proposed respondent for HO <> DK*) OR (*proposed respondent for HO <> RF*) [DHHou <> DK  
OR DHHou <> RF]

| INTERVIEWER: This is not a valid answer! Please change!

| END CHECK

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 2 INDIVIDUAL DEMOGRAPHICS MODULE (ID)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. "[CHECK ER2]") and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## INDIVIDUAL DEMOGRAPHICS MODULE (ID)

### DIINTA \* @

I'd like to ask a few (more) questions about [^you /[^Name]] and [^your /his /her] family.  
1 Press <1> and <Enter> to continue.

### DIDOB

Can I just check that your date of birth is [^<date of birth>]?

- 1 Correct
- 2 Incorrect

*[If whether date of birth correct = Incorrect [DiDob = 2]*

### DIDBN @ [Year of birth recorded in DIDBNY]

What is your date of birth?

*[Year of birth from DHDOB and DIDBN are combined in INDOBYR. If DIDBN was answered then INDOBYR=DIDBN, ELSE Indobyr=DHDOB.*

*Respondents with dates of birth on or before 29/02/1914 are coded as -7]*

END OF FILTER

*[If date of birth = DK [DiDBN = DK]*

### DIAG @ [Recoded in DIAGR with respondents aged 90 or over coded as age 99]

What was your age last birthday?

Range: 0..120

*[Ages from DHAGE and DIAG are combined in INDAGER. If DIAG was answered then INDAGER=DIAG, ELSE INDAGER=DHAGE.*

*Respondents aged 90 or over are coded as 99.*

*Both DHAGE and DIAG are computed from the difference between the date of interview, INTDAT, and the date of birth from DHDOB or DIDBN respectively.]*

END OF FILTER

### DIINT \*\*

Who is completing the proxy for [^Name]?

- 01 [^<Name of Person1>]
- 02 [^<Name of Person2>]
- 03 [^<Name of Person3>]
- 04 [^<Name of Person4>]
- 05 [^<Name of Person5>]
- 06 [^<Name of Person6>]
- 07 [^<Name of Person7>]
- 08 [^<Name of Person8>]
- 09 [^<Name of Person9>]
- 10 [^<Name of Person10>]
- 11 [^<Name of Person11>]
- 12 [^<Name of Person12>]
- 13 [^<Name of Person13>]
- 14 [^<Name of Person14>]
- 15 [^<Name of Person15>]
- 16 [^<Name of Person16>]

97 Not a household member

*IF (Name of proxy respondent <> Member of household) [DiInt <> (1 - 16)]*

**DIPRE \*\***

SHOW CARD A1

(Can I just check,) what is your relationship to [^him / her]?

01 Husband / Wife

02 Partner / cohabitee

03 Natural son / daughter

04 Adopted son / daughter

05 Foster son /daughter

06 Step son / daughter / child of partner

07 Son / daughter-in-law

08 Natural parent

09 Adoptive parent

10 Foster parent

11 Stepparent / parent's partner

12 Parent-in-law

13 Natural brother / sister

14 Half-brother / sister

15 Step-brother / sister

16 Adopted brother / sister

17 Foster brother / sister

18 Brother / sister-in-law

19 Grandchild

20 Grandparent

21 Other relative

22 Other non-relative

96 (THIS CODE NOT USED)

[Don't Know and Refusal are not allowed]

**[CHECK ID1]**

END OF FILTER

**DISEXC \***

ASK OR CODE: Can I just check that [^you are / he is / she is] [^male / female]?

1 Yes

2 No

*IF whether sex correct = No [DiSexC = 2]*

**DISEX \***

INTERVIEWER: Code [^Name's] sex.

1 Male

2 Female

END OF FILTER

**DIMAR \***

SHOW CARD B1

What is [^your / Name's] current legal marital status?

- 1 Single, that is never married
- 2 Married, first and only marriage
- 3 A civil partner in a legally-recognised Civil Partnership
- 4 Remarried, second or later marriage
- 5 Legally separated
- 6 Divorced
- 7 Widowed
- 8 Spontaneous only - In a legally-recognised Civil Partnership and separated from his/her civil partner
- 9 Spontaneous only - Formerly a civil partner, the Civil Partnership is now legally dissolved
- 10 Spontaneous only - A surviving civil partner: his/her partner having since died
- 11 Spontaneous only - A civil partner and has been married or in another Civil Partnership before

**[CHECK ID2]**

*IF respondent is in an institution, e.g. care home*

**MIREL**

Can I just check, what is your relationship to ^[you/name]?

- 01 Husband / Wife
- 02 Partner / cohabitee
- 03 Natural son / daughter
- 04 Adopted son / daughter
- 05 Foster son /daughter
- 06 Step son / daughter / child of partner
- 07 Son / daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent / parent's partner
- 12 Parent-in-law
- 13 Natural brother / sister
- 14 Half-brother / sister
- 15 Step-brother / sister
- 16 Adopted brother / sister
- 17 Foster brother / sister
- 18 Brother / sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 (THIS CODE NOT USED)

[Don't Know and Refusal are not allowed]

*IF (relationship of informant to respondent <> Spouse, Partner) AND (whether has a partner <> Yes)*

*[MIREL <> 1,2 AND PMar = 1]*

**MISPOU**

INTERVIEWER: Ask or code.

^[Do you/Does name] have a partner?

- 1 Yes
- 2 No

END OF FILTER

*IF (relationship of informant to respondent = Spouse, Partner) OR (whether has a partner = yes)  
[(MIREL = 1, 2) OR (MISPOU = 1) OR (PMAR = 1)]*

**MILIVE**

INTERVIEWER: Ask or code.

Where does their spouse or partner live?

- 1 In own home
- 2 Same care home as spouse/partner
- 3 Different care home to spouse/partner

**MISINT**

INTERVIEWER CODE:

Has spouse/partner already had an ELSA interview in this wave?

INTERVIEWER: Refer to front of ARF.

- 1 Yes
- 2 No

END OF FILTER

*IF whether IA block should be addressed to this person number = Yes [IAaskIA[PNo] = Yes]*

**MIFIN**

INTERVIEWER: Ask or code.

Does this couple keep their finances totally separate?

INTERVIEWER : If appropriate refer to front of ARF.

Please check that answer is consistent with partner's.

Whether keep their finances totally separate

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (grandchild or great-grandchild in household grid <> Yes) AND (any living grandchildren or great-grandchildren at last interview <> Yes)*

*[GCINHH <> 1 AND DiGrand (Last int) <> 1]*

**DIGRAN \***

[^Do you / Does ^Name] have any living grandchildren or great-grandchildren?

- 1 Yes
- 2 No

END OF FILTER

*IF (any living grandchildren or great-grandchildren at last interview = Yes)  
[DiGrand (Last int) = 1]*

**DIGNMYC \***

Last time we interviewed [^you / Name] on [^<date of last interview>], [^you / he / she] told us that [^you / he / she] had [^<number of grandchildren or great-grandchildren reported at last

interview>] living grandchildren or great-grandchildren. Is this still the case?

- 1 Yes
- 2 No

END OF FILTER

*IF (grandchild or great-grandchild in household grid = Yes AND any living grandchildren or great-grandchildren at last interview <> Yes) OR (whether has any grandchildren or great-grandchildren = Yes) OR (whether same number of living grandchildren or great-grandchildren as last interview = No) [(GCINHH = 1 AND DiGranD (Last int) <> 1) OR (DiGran = 1) OR (DiGnMyC = 2)]*

**DIGNMY \***

How many living grandchildren or great-grandchildren [^do you / does ^Name] have?

Range: 0..97

**[CHECK ID3-ID5]**

END OF FILTER

*IF number of living brothers or sisters at last interview > 0 [DiSib (Last int) > 0]*

**DISIBC \***

Last time we interviewed [^you / ^Name] in [^<date of last interview>], [^you / he / she] told us that [^you / he / she] had [^<number of brothers or sisters reported at last interview>] living brothers or sisters. [^Do you / Does he / Does she] still have [^<number of brothers or sisters reported at last interview>] living brothers or sisters?

- 1 Yes
- 2 No

END OF FILTER

*IF (whether same number of living brothers or sisters as last interview = No) OR (number of living brothers or sisters at last interview = NON RESPONSE OR EMPTY) [DiSibC (Last int) = 2 OR DiSib (Last int) = NON RESPONSE OR EMPTY]*

**DISIB \***

How many living brothers or sisters [^do you / does ^Name] have?

IF ASKED: Foster / adoptive / step-brothers / sisters can be included.

Range: 0..97

**[CHECK ID6-ID7]**

END OF FILTER

*IF (natural mother still alive at last interview <> No) AND (natural mother in household grid <> Yes) [DinMaD (Last int) <> No AND IMainHH <> Yes]*

**DINMA \***

Is [^your / ^Name's] natural mother still alive?

- 1 Yes
- 2 No

*IF natural mother alive = Yes [DiNMA = 1]*

**DIANM \***  
 How old is [^your / ^Name's] natural mother?  
 Range: 16..120

**[CHECK ID8-ID10]**

END OF FILTER

END OF FILTER

*IF (natural mother in household grid <> Yes) AND ((natural mother still alive at last interview = No) OR (natural mother still alive = No))  
 [/MainHH <> 1 AND ((DinMaD (Last int) = 2) OR (DiNMA = 2))]*

**DIMDOB \***  
 What was [^your / ^Name's] natural mother's date of birth?  
 DATETYPE

**[CHECK ID11]**

END OF FILTER

*IF natural mother in household grid = Yes [/MainHH = 1]*

**DIMADI \***  
 Has [^your / ^Name's] natural mother ever been told by a doctor that she has diabetes?  
 1 Yes  
 2 No

END OF FILTER

*IF natural mother still alive = No [DiNMA = 2]*

**DIMAD \***  
 How old was [^your / ^Name's] natural mother / when she died/?  
 INTERVIEWER: If the respondent doesn't know the exact age, ask for an estimate.  
 Range: 0..120

**[CHECK ID12]**

END OF FILTER

*IF ((natural mother still alive at last interview = No) OR (natural mother still alive = No)) AND (natural mother's date of birth = DK, RF)  
 [(DiNMA = 2 OR DinMaD (Last int) = 2) AND (DiMDOB = DK,RF)]*

**DIMDYR \***  
 What year did [^your / ^Name's] mother die?  
 INTERVIEWER: If the respondent doesn't know the exact year, ask for an estimate.  
 RANGE: 1920..2012

**[CHECK ID13]**

END OF FILTER

*IF natural mother still alive = No [DiNMA = 2]*

**DICDNM \***

SHOW CARD B2

Did [^your / ^Name's] natural mother die from any of the conditions on this card?  
CODE ONE ONLY.

- 1 Cancer
- 2 Heart Attack
- 3 Stroke
- 4 Other cardiovascular related illness
- 5 Respiratory disease
- 96 None of these

END OF FILTER

**DIMAEDU \***

At what age did [^your / ^Name's] natural mother finish her continuous full-time education at school or college?

(No instruction to CODE ONE ONLY)

- 1 Never went to school
- 2 14 or under
- 3 At 15
- 4 At 16
- 5 At 17
- 6 At 18
- 7 19 or over

*IF (natural father still alive at last interview <> No) AND (natural father in household grid <> Yes)  
[DinFaD (Last int) <> No AND IPainHH <> Yes]*

**DINFA \***

Is [^your / ^Name's] natural father still alive?

- 1 Yes
- 2 No

*IF natural father alive = Yes [DiNFA = 1]*

**DIANF \***

How old is [^your / ^Name's] natural father?

Range: 16..120

**[CHECK ID14-ID16]**

END OF FILTER

END OF FILTER

*IF (natural father in household grid <> Yes) AND ((natural father still alive last interview = No) OR  
(natural father still alive = No)  
[IPainHH <> 1 AND ((DinFaD (Last int) = 2) OR (DiNFA = 2))]*

**DIFDOB**

What was [^your / ^Name's] natural father's date of birth?

DATETYPE

**[CHECK ID17]**

END OF FILTER

*IF natural father in household grid <> Yes [IPainHH <> 1]*

**DIFADI \***

Was [^your / ^Name's] natural father ever told by a doctor that he has diabetes?

- 1 Yes
- 2 No

END OF FILTER

*IF natural father still alive = No [DiNFA = 2]*

**DIFAD \***

How old was [^your / ^Name's] natural father when he died?

INTERVIEWER: If the respondent doesn't know the exact age, ask for an estimate.

Range: 0..120

**[CHECK ID18-ID19]**

END OF FILTER

*IF ((natural father still alive at last interview = No) OR (natural father still alive = No)) AND (natural father's date of birth = DK,RF)*

*[(DiNFA = 2 OR DinFaD (Last int) = 2) AND (DiFDOB = DK,RF)]*

**DIFDYR**

What year did [^your / ^Name's] father die?

INTERVIEWER: If the respondent doesn't know the exact year, ask for an estimate

RANGE: 1920..2012

**[CHECK ID20]**

END OF FILTER

*IF (natural father still alive = No) [DiNFA = 2]*

**DICDNF \***

SHOW CARD B2

Did [^your / ^Name's] natural father] die from any of the conditions on this card]?

CODE ONE ONLY.

- 1 Cancer
- 2 Heart Attack
- 3 Stroke
- 4 Other cardiovascular related illness
- 5 Respiratory disease
- 96 None of these

END OF FILTER

**DIPAEDU \***

At what age did [^your / [^Name's]] natural father finish his continuous full-time education at school or college?

(No instruction to CODE ONE ONLY)

01 Never went to school

02 14 or under

03 At 15

04 At 16

05 At 17

06 At 18

07 19 or over

*IF who lived with for most of childhood at last interview <> RESPONSE*

[DiKLiv (Last int) <> RESPONSE]

**DIKLIV \***

Who did [^you/he/she] live with for most of [^your/his/her] childhood?

01 Both natural parents

02 Natural mother and step-father

03 Natural father and step-mother

04 Natural mother

05 Natural father

06 Step-parents

07 Foster Parents

08 Adoptive parents

09 Children's Home

95 Other (specify)

END OF FILTER

*IF who lived with for most of childhood = Other [DiKLiv = 95]*

**DIKLO \* @**

INTERVIEWER: write in who respondent lived with.

String 20

**[Open responses to DIKLO were coded and then incorporated into DIKLIV. DIKLIVC identifies that an open response was given at DIKLO and incorporated into DIKLIV]**

END OF FILTER

*IF who lived with for most of childhood = RESPONSE AND who lived with for most of childhood <>*

*Children's Home*

[DiKLiv = RESPONSE AND DiKLiv <> 9)]

**DIFJOB \***

What was [^your/[^Name's]] [^main carer's / father's / step-father's / foster father's / adoptive father's / mother's] main occupation when [^you were / he was / she was] 14?

01 Armed Forces

02 Manager or senior official in someone else's business

03 Running his own business

04 Professional or technical

05 Administrative, clerical or secretarial

06 Skilled trade

07 Caring, leisure, travel or personal services

08 Sales or customer service

09 Plant, process or machine drivers or operators  
10 Other jobs  
11 Something else  
12 Casual jobs  
13 Retired  
14 Unemployed  
15 Sick / disabled

END OF FILTER

**DITSET \* @**

INTERVIEWER: The Individual Demographics section is finished.  
Please enter 1 here to make the program store the current time and date.  
Range: 1..1  
[Don't Know and Refusal are not allowed]

## **ID Module Checks**

### **ID1 DIPRE**

CHECK: Relationship to proxy <> Self [DiPRe <> Self]

This is not a valid code - please change.

END CHECK

### **ID2 DIMAR**

*IF (Marital status = RESPONSE) AND (ICouple = RESPONSE)*  
*[DiMar = RESPONSE AND ICouple = RESPONSE]*

*IF ICouple = Married [ICouple = Married]*

CHECK: Marital Status = Married, first and only marriage, Remarried, second or later  
marriage [DiMar = Marr1st, Remarr]

INTERVIEWER: Are you sure? Respondent is recorded in HH Grid as having a  
husband / wife

END CHECK

END OF FILTER

END OF FILTER

### **ID3 DIGNMY**

### **ID4 DIGNMY**

### **ID5 DIGNMY**

*IF (number of living grandchildren or great-grandchildren = RESPONSE) [DiGnMy = RESPONSE]*

CHECK: Number of living grandchildren or great-grandchildren < 20 [DiGnMy < 20]

INTERVIEWER: ^dignmy seems high. Are you sure?

END CHECK  
 END OF FILTER

*IF (Number of living grandchildren or great-grandchildren = RESPONSE) AND (number of living grandchildren or great-grandchildren (last interview) = RESPONSE)  
 [DiGnMy = RESPONSE AND DiGnMy (last int) = RESPONSE]*

CHECK: Number of living grandchildren or great-grandchildren >= Number of living grandchildren or great-grandchildren (last int)  
 [DiGnMy >= IFFW[PNo].DiGnMy]

INTERVIEWER: Please check, that is fewer living grandchildren and great-grandchildren now than they did when we last interviewed them.

END CHECK  
 END OF FILTER

*IF (DiGnMyC = No) AND (DiGnMy = RESPONSE)*

CHECK: (DiGnMy <> IFFW[PNo].DiGnMy)  
 INTERVIEWER: You recorded that the number of grandchildren has changed but have entered the same number.

END CHECK  
 END OF FILTER

**ID6 DISIB**  
**ID7 DISIB**  
*IF number of living brothers or sisters = RESPONSE [DiSib = RESPONSE]*

CHECK: Number of living brothers or sisters < 12 [DiSib < 12]  
 INTERVIEWER: ^Number of living brothers or sisters seems high. Are you sure?

END CHECK  
 END OF FILTER

*IF (number of living brothers or sisters = RESPONSE) AND (number of living brothers or sisters (last interview) = RESPONSE)  
 [DiSib = RESPONSE AND IFFW[PNo].DiSib = RESPONSE]*

CHECK: (number of living brothers or sisters <= number of living brothers or sisters (LAST INT)) INVOLVING (number of living brothers or sisters)  
 [DiSib <= IFFW[PNo].DiSib INVOLVING DiSib]

INTERVIEWER: Please check that is **more** living brothers and sisters than they had last time they were interviewed.

END CHECK

END OF FILTER

**ID8 DIANM**

**ID9 DIANM**

**ID10 DIANM**

*IF age of natural mother = RESPONSE [DiANM = RESPONSE]*

CHECK: Age of natural mother > 50 [DiANM > 50]

INTERVIEWER: The respondents' mother seems young (^dianm).  
Please check.

END CHECK

END OF FILTER

*IF (Age of natural mother = RESPONSE) AND (Respondent Age > 0)*

*[DiANM = RESPONSE AND IAgeOf > 0]*

CHECK: (Age of natural mother - Respondent Age) > 15 [DiANM - IAgeOf > 15]

INTERVIEWER: The respondents' mothers age seems low (^dianm) relative to the  
age of the respondent (^iageof[pno]). Please check.

END CHECK

END OF FILTER

*IF (Age of natural mother = RESPONSE) AND (Respondent Age > 0)*

*[DiANM = RESPONSE AND IAgeOf > 0]*

CHECK: Age of natural mother > Respondent Age [DiANM > IAgeOf]

INTERVIEWER: This is younger than ^iname[pno] now!  
Please check!

END CHECK

END OF FILTER

**ID11 DIMDOB**

*IF (DiMDOB = RESPONSE)*

CHECK: (AGE(DiMDOB,SIIIntDat) - IAgeOf[pno]) >= 15

Are you sure this is the correct date of birth? ^IName[pno] is aged ^IAgeOf[pno] so would have been  
born before ^dhisher[pno] mother was 15.

END CHECK

END OF FILTER

**ID12 DIMAD**

*IF Age at which natural mother died = RESPONSE [DiMaD = RESPONSE]*

CHECK: Age at which natural mother died >= 16 [DiMaD >= 16]

INTERVIEWER: Are you sure they were this age when they died?

END CHECK

END OF FILTER

**ID13 DIMDYR**

*IF (DiMdYr = RESPONSE)*

CHECK: DiMdYr >= IDoB[PNo].Year

This is before ^IName[pno] was born. Please check.

END CHECK

END OF FILTER

**ID14 DIANF****ID15 DIANF****ID16 DIANF**

*IF age of natural father = RESPONSE [DiANF = RESPONSE]*

CHECK: Age of natural father > 50 [DiANF > 50]

INTERVIEWER: The respondents' father seems young (^dianf). Please check.

END CHECK

END OF FILTER

*IF (Age of natural father = RESPONSE AND (Respondent Age > 0))*

*[DiANF = RESPONSE AND IAgeOf > 0]*

CHECK: (Age of natural father – Respondent Age) > 15 [DiANF - IAgeOf > 15]

INTERVIEWER: The respondents' fathers age seems low (^dianf) relative to the age of the respondent (^iageof[pno]). Please check.

END CHECK

END OF FILTER

*IF (Age of natural father = RESPONSE) AND (Respondent Age > 0)*

*[DiANF = RESPONSE AND IAgeOf > 0]*

CHECK: Age of natural father > Respondent Age [DiANF > IAgeOf]

INTERVIEWER: This is younger than ^iname[pno] now!  
Please check!

END CHECK

END OF FILTER

## ID17 DIFDOB

*IF (DiFDOB = RESPONSE)*

*CHECK: (AGE(DiFDOB, SIIntDat) - IAgeOf[pno] >= 15)*

Are you sure this is the correct date of birth? ^Name[pno] is aged ^AgeOf[pno] so would have been born before ^dhishe[pno] father was 15.

END CHECK

END OF FILTER

## ID18 DIFAD

## ID19 DIFAD

*IF age at which natural father died = RESPONSE [DiFAD = RESPONSE]*

*CHECK: DiFAD >= 16 [DiFAD >= 16 ENG]*

INTERVIEWER: Are you sure they were this age when they died?

END CHECK

*CHECK: DiFAD >= 12 [DiFAD >= 12 ENG]*

INTERVIEWER: The age at which the respondent's father died is too young. Please change.

END CHECK

END OF FILTER

## ID20 DIFDYR

*IF (DiFdYr = RESPONSE)*

*CHECK: DiFdYr >= IDoB[PNo].Year*

This is before ^Name[pno] was born. Please check

END CHECK

END OF FILTER

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 3 HEALTH MODULE (HE)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. "[CHECK ER2J") and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## **HEALTH MODULE (HE)**

### **HEHELP**

Now I would like to ask you some questions about your health. Would you say your health is...  
INTERVIEWER: Read out...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

### **HEILL\***

[^Do you / Does [^name]] have any long-standing illness, disability or infirmity? By long-standing I mean anything that has troubled [^you / [^name]] over a period of time, or that is likely to affect [^you / [^name]] over a period of time.

- 1 Yes
- 2 No

*IF whether has long-standing illness = yes [HeIll = 1]*

### **HELIM\***

(Does this / Do these) illness(es) or disability(ies) limit [^your / [^name's]] activities in any way?

- 1 Yes
- 2 No

END OF FILTER

### **HELWK**

Do you have any health problem or disability that limits the kind or amount of paid work you could do, should you want to?

- 1 Yes
- 2 No

*IF whether health limits paid work = yes [HeLWk = 1]*

### **HETEMP**

Is this a health problem or disability that you expect to last less than three months?

- 1 Yes
- 2 No

END OF FILTER

### **HEFINT\* @**

The next question asks about difficulties you may have walking a quarter of a mile because of a health problem. By health problem we mean any long-term physical, mental or emotional problem or illness.

1 Press <1> and <Enter> to continue.

### **HEFUNC\***

By [^yourself / himself / herself] and without using any special equipment, how much difficulty [^do you / does [^name]] have walking for a quarter of a mile? [^Do you / Does he / Does she] have...

INTERVIEWER: Read out...

- 1 ...no difficulty,
- 2 some difficulty,

3 much difficulty,  
4 or, [^are you / is he / is she] unable to do this?

**HEEYE\***

Is [^your / [^name's]] eyesight (using glasses or corrective lens if [^you use / he uses / she uses] them)...  
INTERVIEWER: Read out...

- 1 ...excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

6 SPONTANEOUS: Registered or legally blind

*IF eyesight is fair, poor, or blind [HEEYE = 4, 5, or 6]*

**HEEYEA\***

^Are/Is ^you/name registered with your local council as partially sighted (also known as sight impaired), or blind (also known as severely sight impaired)?

- 1 Partially sighted (also known as sight impaired)
- 2 Blind (also known as severely sight impaired)
- 3 Not registered as being sight impaired

END OF FILTER

*IF (eyesight condition <> blind) [Heeye <> 6]*

**HEFRND**

How good is your eyesight for seeing things at a distance, like recognising a friend across the street (using glasses or corrective lenses if use them)? Would you say it is...

INTERVIEWER: Read out...

- 1 ...excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

**HEPAP**

How good is your eyesight for seeing things up close, like reading ordinary newspaper print (using glasses or corrective lenses if use them)? Would you say it is...

INTERVIEWER: Read out...

- 1 ...excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

END OF FILTER

*IF (types of eye conditions at last interview = RESPONSE) AND NOT (types of eye conditions at last interview = none)*

*[(HeOpt (Last int) = RESPONSE) AND NOT (HeOpt (Last int) = 96)]*

**HEOPC @**

Our records show that when we last interviewed you [^on <date of last interview>], you said that

you had had (or had been told by a doctor you had had) [^glaucoma or suspected glaucoma / diabetic eye disease / macular degeneration / cataracts].

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

1 Yes

2 No

**[Multiple responses to HEOPC are recoded in variables HEOPCGL, HEOPCDI, HEOPCDI, HEOPCMD, HEOPCCA]**

*IF whether confirms previous eye condition = No [HeOpC = 2]*

**HEOPN @**

INTERVIEWER: Code reason why respondent disputes the [^glaucoma or suspected glaucoma / diabetic eye disease / macular degeneration / cataracts] report.

Respondent says...

1 Never had

2 No longer has

3 Did not have previously, but has now

4 Misdiagnosed

**[There is a separate variable for responses about each of the type of illness respondent disputes. Responses are recoded in HEOPNGL HEOPNDI HEOPNMD HEOPNCA]**

END OF FILTER

*IF whether confirms previous eye condition = Yes [HeOpC = 1]*

**HEOPS @**

Do you still have [^glaucoma or suspected glaucoma / diabetic eye disease / macular degeneration / cataracts]?

1 Yes

2 No

**[There is a separate variable for responses about each of the type of illness respondent disputes. Responses are recoded in HEOPSGL HEOPSDI HEOPSMID HEOPSCA]**

END OF FILTER

END OF FILTER

**HEOPT\*@**

[^Has / Apart from what you have already told us and thinking about what has happened since we last saw [^you / ^name]] on [^date of last interview] has] a doctor or optician [^BLANK /ever] told [^you/ ^name]] that [^you have/ he has/ she has] (or [^you/ he/ she] had) [^BLANK /any of these other conditions]...

INTERVIEWER: Read out each in turn and code all that apply.

Include Diabetic Retinopathy in code 2.

Include age related Maculopathy in code 3.

1 [^Glaucoma or suspected glaucoma]

2 [^Diabetic eye disease]

3 [^Macular degeneration]

4 [^Cataracts]

96 None of these

**[Multiple responses to HEOPT are recoded in variables HEOPTGL HEOPTDI HEOPTMD HEOPTCA HEOPT96]**

**[code maximum 4 out of 5 possible responses]**

**[CHECK HE7-HE9]**

*IF ((types of eye conditions = cataract OR (types of eye conditions at last interview = cataract AND whether confirms previous eye condition = yes)) AND (eyesight condition = fair, poor, blind OR eyesight at a distance = fair, poor OR eyesight up close = fair, poor))  
[((HeOpT = 4 OR (HeOpT (Last int) = 4 AND HeOpC = 1)) AND (Heeye = 4, 5, 6 OR Hefrnd = 4, 5 OR Hepap = 4, 5))]*

**HEDREYE**

Has a doctor or optician ever recommended that you have your cataracts removed?

- 1 Yes
- 2 No

END OF FILTER

*IF ((types of eye conditions = cataracts) OR (whether confirms previous eye condition = yes) OR (why disputes condition = no longer has)) AND whether anyone recommended cataracts removed <> no  
[((HeOpT = 4) AND ((HeOpC = 1) OR (HeOpN = 2)) AND HeDrEye <> 2)]*

**HECAT\***

[[^Have you / Has he / Has she] / Since we last talked to [^you / [^name]] on [^<date of last interview>] [^have you / has he / has she]] [^BLANK / ever] had cataract surgery?

- 1 Yes
- 2 No

*IF whether has had cataract surgery = Yes [HeCat = 1]*

**HECATN\***

Was [^your/[^name's]] cataract surgery [^since] paid for privately or by the NHS?  
INTERVIEWER: Count as *NHS* if the operation was on private premises but paid for by the NHS. Count as *private* if the operation was on NHS premises but paid for privately.

- 1 Privately/Insurance
- 2 NHS
- 3 Both

END OF FILTER

END OF FILTER

**HEHEAR\***

Is [^your / [^name's]] hearing (using a hearing aid if [^you use / he uses / she uses] one)...

INTERVIEWER: Read out...

- 1 ...excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

**HEHRA**

Do you find it difficult to follow a conversation if there is background noise, such as TV, radio or children playing (using a hearing aid as usual)?

- 1 Yes
- 2 No

**HESLPA**

SHOW CARD C1

How often do you have difficulty falling asleep?

INTERVIEWER: Count as yes if cannot get to sleep for at least 30 minutes.

- 1 Not during the last month
- 2 Less than once a week
- 3 Once or twice a week
- 4 Three or more times a week

**HESLPB**

SHOW CARD C1

How often do you wake up several times in the night?

- 1 Not during the last month
- 2 Less than once a week
- 3 Once or twice a week
- 4 Three or more times a week

**HESLPC**

SHOW CARD C2

How often in the past month did you have trouble staying asleep (including waking far too early)?

- 1 Not at all
- 2 1-3 days
- 3 4-7 days
- 4 8-14 days
- 5 15-21 days
- 6 22-31 days

**HESLPD**

SHOW CARD C1

How often do you wake up after your usual amount of sleep feeling tired and worn out?"

- 1 Not during the last month
- 2 Less than once a week
- 3 Once or twice a week
- 4 Three or more times a week

**HESLPE**

How many hours of sleep do you have on an average week night?

You can tell me to the nearest half hour.

RANGE: 1.00..15.00

**[CHECK HE10-HE11]****HESLPX**

SHOW CARD C1

How often do you doze off or take a nap during the morning or afternoon?

- 1 Not during the last month
- 2 Less than once a week
- 3 Once or twice a week

4 Three or more times a week

### HESLPF

During the last month, how would you rate your sleep quality overall. Would you say it was...

INTERVIEWER: Read out...

- 1...Very good
- 2 Good
- 3 Fairly bad
- 4 Very bad?

{HEDENT, HEDNTA, HEDNTB - removed}

*IF (age >= 65) [AgeOf >= 65]*

### HEBPCCHK

In the past year, has any doctor or nurse checked your blood pressure?

- 1 Yes
- 2 No

END OF FILTER

*IF (type of CVD condition at last interview = RESPONSE) AND NOT (type of CVD condition at last interview = none)*

*[(HeDiaa (Last int) = RESPONSE) AND NOT (HeDiaa (Last int) = 96)]*

### LOOP FOR EACH CVD CONDITION AT LAST INTERVIEW

#### HEDIAC\*@

INTERVIEWER: Please check the following sentence before reading out loud.

[^BLANK / Our records show that when we last interviewed [^you / [^name]] on [^date of last interview] [^you / he / she] said that [^you / he / she] had had (or had been told by a doctor [^you / he / she] had had) / Our records also show that when we last interviewed [^you / [^name]] on [^date of last interview] [^you / he / she] said that [^you / he / she] had had (or had been told by a doctor [^you / he / she] had had)] [^high blood pressure or hypertension / angina / a heart attack (including myocardial infarction / or coronary thrombosis) / congestive heart failure / a heart murmur / an abnormal heart rhythm / diabetes or high blood sugar / a stroke (cerebral vascular disease)].

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No

3 Not read out as didn't make sense

*[There is a separate variable for responses about each CVD condition. Responses are recoded in: HEDACBP HEDACAN HEDACMI HEDACHF HEDACAR HEDACDI HEDACST HEDACCH HEDACOT]*

*IF whether confirms previous CVD condition = no [HeDiaC = 2]*

#### HEDIAN@\*

INTERVIEWER: Code reason why respondent disputes having had [^high blood pressure or hypertension / angina / a heart attack (including myocardial infarction / or coronary thrombosis) / congestive heart failure / a heart murmur / an abnormal heart rhythm / diabetes or high blood sugar / a stroke (cerebral vascular disease)]. Respondent says...

- 1 Never had
- 2 No longer has

- 3 Did not have previously, but has now
- 4 Misdiagnosed

**[There is a separate variable for responses about each of the type of illness]  
[Responses are recoded in HEDANBP HEDANAN HEDANMI HEDANHF HEDANHM  
HEDANAR HEDANDI HEDANST HEDANCH HEDANOT]**

END OF FILTER

*IF (whether confirms previous CVD condition = yes) AND NOT (CVD condition at last interview =[Heart attack, diabetes or high blood sugar, or stroke])  
[(HeDiaC = 1) AND NOT (PSeq = [3,7,8])]*

**HEDIAS\* @**

[^Do you / Does [^name]] still have [^high blood pressure or hypertension / angina / a heart attack etc.]?

INTERVIEWER: If spontaneously says that it is controlled by treatment code 'Yes'.

- 1 Yes
- 2 No

**[There is a separate variable for responses about each of the type of illness]  
[Responses to HEDIA are recoded in variables HEDASBP HEDASAN  
HEDASHF HEDASHM HEDASAR HEDASCH HEDASOT]**

END OF FILTER

END OF FILTER

END OF FILTER

**HEDIAA@\***

SHOW CARD C3

[^Has / Apart from what you have already told us, and thinking about what has happened since we last saw [^you / [^name]] on [^date of last interview] has] a doctor [^BLANK / ever] told [^you / [^name]] that [^you have / he has / she has] (or have had) any of the [^BLANK / other] conditions on this card?

INTERVIEWER: PROBE - 'What others?' Code all that apply.

- 01 [^High blood pressure or hypertension]
- 02 [^Angina]
- 03 [^A heart attack (including myocardial infarction or coronary thrombosis)]
- 04 [^Congestive heart failure]
- 05 [^A heart murmur]
- 06 [^An abnormal heart rhythm]
- 07 [^Diabetes or high blood sugar]
- 08 [^A stroke (cerebral vascular disease)]
- 09 [^High cholesterol]
- 95 [^Any other heart trouble (SPECIFY)]
- 96 None of these

**[Multiple responses to HEDIAA are recoded in variables HEDIABP HEDIAAN HEDIAMI  
HEDIAMI HEDIAHF HEDIAHM HEDIAAR HEDIADI HEDIAST HEDIACH HEDIA95 HEDIA96]  
[code maximum 10 out of 11 possible responses]**

**[CHECK HE12-HE13]**

*IF type of CVD condition = other [HeDiaa = 95]*

**HEDIX\* @**

INTERVIEWER: Enter name of other heart condition.

String 30

*[Open responses to HEDIX are coded and merged with the multiple responses to HEDIAA (recoded as above). These merged responses are recoded in variables: HEDIMBP HEDIMAN HEDIMMI HEDIMHF HEDIMHM HEDIMAR HEDIMDI HEDIMST HEDIMCH HEDIM85 HEDIM86 HEDIM96]*

END OF FILTER

**[CHECK HE14]**

*IF (type of CVD condition = high blood pressure) OR (type of CVD condition at last interview = high blood pressure AND reason for disputing high blood pressure <> Never had the condition, Misdiagnosed)*

*[(HeDiaa = 1) OR ((HeDiaa (Last int) = 1 AND HeDiaN <> 1 AND HeDiaN <> 4))]*

**HEHIBPB @**

Some doctors suggest that some patients take medication to lower their blood pressure. Did a doctor or nurse ever suggest that you take any medication to lower your blood pressure?

- 1 Yes
- 2 No

*[Response to HEHIBPB is recoded in variable HEHBPB]*

END OF FILTER

*IF ((type of CVD condition = high blood pressure) OR ((type of CVD condition at last interview = high blood pressure AND still has the previous condition = yes)) AND whether medication is taken <> no) [(HeDiaa = 1) OR(HeDiaa (last int) = 1 AND HeDiaS = 1)) AND Hehibpb <>2)]*

**HEMDA\***

[^Are you / Is [^name]] currently taking any medication, tablets or pills for high blood pressure?

- 1 Yes
- 2 No

END OF FILTER

*IF ((whether still has CVD condition = no) OR (reason CVD condition disputed= no longer has) OR (whether taking medication for the condition at last interview = yes) OR (whether taking medication to prevent high BP = yes)) AND whether taking medication for high BP <> EMPTY AND whether recommended medication to lower BP <>No)*

*[((HeDiaN = 2) OR (HeDiaS = 2) OR (HEMdab (Last int) = 1) OR (HEMdab (Last int) = 1)AND (HEMdab <> EMPTY) AND (Hehibpb <>No))]*

**HEMDAB**

Can I just check, are you taking any medication which prevents you from getting high blood pressure?

INTERVIEWER: If respondent queries the question say that they previously did report having high blood pressure.

END OF FILTER

*IF type of CVD condition at last interview <> RESPONSE AND type of heart condition = angina  
[HeDiaa (Last int) <> RESPONSE AND HeDiaa = 2]*

**HEAGA\***

Approximately how old [^were you/ was [^name]] when [^you were/ he was /she was] first told by a doctor that [^you/ he/ she] had angina?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE15-HE16]**

END OF FILTER

*IF ((type of CVD condition = angina) AND (type of CVD condition at last interview =  
RESPONSE) AND NOT (type of CVD condition at last interview = angina))  
[((HeDiaa = 2) AND (HeDiaa (Last int) = RESPONSE) AND NOT (HeDiaa (Last int) = 2))]*

**HEAGAR**

When [^were/was] [^you/[^name]] first told by a doctor that you had angina?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGARY**

INTERVIEWER: Enter the year at this question.

Range: 2002..2004

**[CHECK HE17-HE18]**

END OF FILTER

*IF type of CVD condition = angina [HeDiaa = 2]*

**HEYRA**

In the last two years, have you had any angina or chest pains due to your heart?

- 1 Yes
- 2 No

END OF FILTER

*IF type of condition at last interview <> RESPONSE AND type of conition = heart attack  
[(HeDiaa (Last int) <> RESPONSE) AND (HeDiaa = 3)]*

**HEAGB\***

Approximately how old [^were you/ was [^name] when [^you were/ he was /she was] first told by a doctor that [^you/ he /she] had a heart attack (including myocardial infarction or coronary thrombosis)?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE19-HE20]**

END OF FILTER

*IF (type of CVD condition = heart attack) AND (type of CVD condition at last interview = RESPONSE)  
AND (type of CVD condition at last interview <> heart attack)  
[(HeDiaa = 3) AND (HeDiaa (Last int) = RESPONSE) AND (HeDiaa (Last int) <> 3)]*

**HEAGBR\***

When in the last two years [^were you/ was [^name] first told by a doctor that [^you/ he/ she] had a heart attack?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGBRY\***

INTERVIEWER: Enter the year at this question.

Range: 2002..2004

**[CHECK HE21 - HE22]**

END OF FILTER

*IF (type of CVD condition = heart attack) OR (whether confirms previous CVD condition = yes AND reason CVD condition disputed <> Never had condition AND reason CVD condition disputed <> Misdiaognosed)*

*[(HeDiaa = 3) OR ((HeDiaC = 1) AND (HeDiaN <> 1) AND(HeDiaN <> 4))]*

**HENMMI\***

How many heart attacks (including myocardial infarction or coronary thrombosis) [^have you/ has [^name]] had in the last two years according to a doctor?

- 1 1
- 2 2
- 3 3 or more

END OF FILTER

MT removed **HEYRB (Deleted wave 3)**

*IF number of heart attacks = 1 or more [HeNmMI = 1,2,3]*

**HEBETA**

Did any doctor ever tell [^you/ [^name] that [^you /he / she] should take a medication called a betablocker?

INTERVIEWER: PROBE - 'The following drugs are common betas blockers: Atenolol, metoprolol, acebutolol, metoprolol, propranolol, and timolol.'

1 Yes

2 No

END OF FILTER

**MT removed HEBETB\*, HEDIXA**

*IF ((type of CVD condition at Last interview <> RESPONSE) AND (type of CVD condition = congestive heart failure))*

*[(HeDiaa (Last int) <> RESPONSE) AND (HeDiaa = 4)]*

**HEAGC\***

Approximately how old [^were you /was [^name]] when [^you were /he was /she was] first told by a doctor that [^you /he /she] had congestive heart failure?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE23 - HE24]**

END OF FILTER

*IF ((type of CVD condition = congestive heart failure) AND (type of CVD condition at last interview = RESPONSE) AND NOT (type of CVD condition at last interview = congestive heart failure))*

*[((HeDiaa = 4) AND (HeDiaa (Last int) = RESPONSE) AND NOT (HeDiaa (Last int) = 4))]*

**HEAGCR\***

When [^were you/ was [^name] first told by a doctor that [^you/ he/ she] had congestive heart failure?

INTERVIEWER: Enter response in month and year.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**HEAGCRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE25-HE26]**

END OF FILTER

*IF (type of CVD condition at Last interview <> RESPONSE) AND (type of CVD condition = diabetes)  
[(HeAgD (Last int) <> RESPONSE) AND HeDiaa = 7]*

**HEAGD\***

Approximately, how old [^were you/ was [^name]] when [^you were/ he was /she was] first told by a doctor that [^you/ he /she] had diabetes or high blood sugar?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE27]**

END OF FILTER

*IF ((type of CVD condition = diabetes) AND (type of CVD condition at Last interview = RESPONSE)  
AND NOT (type of CVD condition at last interview = diabetes))  
[((HeDiaa = 7) AND (HeDiaa (Last int) = RESPONSE) AND NOT (HeDiaa (Last int) = 7))]*

**HEAGDR\***

When [^were you/ was [^name]] first told by a doctor that [^you/ he/ she] had diabetes or high blood sugar?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGDRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE28 - HE29]**

END OF FILTER

*IF (told by doctor has diabetes at last interview = No OR told by doctor has diabetes at last interview = DK) AND (reason for disputing the condition <> Never had condition or Misdiagnosed)) OR (Whether confirms previous condition = yes AND whether told by doctor has diabetes at last interview <> RESPONSE) OR (type of CVD condition = diabetes)*

$[(HeDiaa = 7) \text{ OR } ((HeAcd (\text{Last int}) = \text{No} \text{ OR } HeAcd (\text{Last int}) = \text{DK}) \text{ AND } (HeDiaN <> 1, 4)) \text{ OR } (HeDiaC = 1 \text{ AND } HeAcd (\text{Last Int}<> \text{RESPONSE})) \text{ OR } (HeDiaa = 7)]$

**HEACD\***

INTERVIEWER: ASK OR CODE: Has a doctor ever told [^you/ [^name]] that [^you have/ he has/ she has] diabetes?

1 Yes

2 No

*IF whether ever told had diabetes = yes [HeACd = 1]*

**HEINS\***

[^Do you / Does [^name]] currently inject insulin for diabetes?

1 Yes

2 No

**HEMDB\***

[^Are you/ Is [^name]] currently taking any tablets, pills or other medication that [^you swallow/ he swallows/ she swallows] for diabetes?

1 Yes

2 No

**HEACE\***

Has a doctor discussed with [^you/ [^name]] whether [^you/ he/ she] should take a medication called an ACE inhibitor or A2 receptor blocker?

INTERVIEWER: PROBE - 'These drugs are also called angiotensin converting enzyme inhibitors or angiotensin-II receptor blockers. Examples are captopril, enalopril, lisinopril, losartan, and valsartan.

1 Yes

2 No

**HEACEA\***

SHOW CARD C4

I would like to check whether any of the medications [^you are/ [^name] is] taking are on this list of ACE inhibitors or A2 receptor blockers. Could you show me the medications, or the repeat prescription list for any medications, that [^you have/ he has/ she has] been taking over the past week?

INTERVIEWER: Please check the names of all medications to see if they are included in the list of ACE inhibitors or A2 receptor blockers. Press 1 if you identify one respondent's medications as being on the list of ACE inhibitors or A2 receptor blockers, otherwise press 2. PROBE: Can I just check that these are / this is a medication that been taking over the past week?

1 Taking ACE inhibitor or A2 receptor blocker

2 Not taking ACE inhibitor or A2 receptor blocker

3 Taking other ACE inhibitor not on the showcard

*IF whether taking ACE inhibitor / A2 receptor blocker in past week = no [HeAcea = 2]*

**HEWEE**

Some doctors check to see if patients with diabetes have protein in their urine. [^Have you/ Has [^name]] had a urine test for protein in the past 12 months?

INTERVIEWER: PROBE - 'This test may also be called a microalbumin test, and involves a first morning urine sample or 24-hour urine collection.'

1 Yes

2 No

*IF whether had urine test in past 12 months = yes [Heweet = 1]*

**HEWEEA**

Has a doctor ever told you that you have protein in your urine?

1 Yes

2 No

END OF FILTER

ELSE

*IF whether taking ACE inhibitor / A2 receptor blocker in past week = taking other ACE inhibitor [Heacea = 3]*

**HEDIXB@**

INTERVIEWER: Enter name of other ACE inhibitor.

String 30

END OF FILTER

END OF FILTER

**HEKIDN**

Has a doctor ever told you that you that your diabetes has caused trouble with your kidneys?

1 Yes

2 No

**HESUG**

Have you ever had a special blood test to see how well your blood sugar was controlled?

This test is called a glycosylated haemoglobin, or haemoglobin A1c, or fructosamine. This is a blood test taken at a doctor's surgery or health centre or laboratory.

1 Yes

2 No

*IF whether ever had blood sugar test = yes [Hesug = 1]*

**HESUGA**

Have you had this test (glycosylated haemoglobin or fructosamine) performed in the past 12 months?

1 Yes

2 No

END OF FILTER

**HEFTCHK**

Some doctors suggest that some patients with diabetes have a regular foot examination.

In the past year, has any doctor or nurse examined your bare feet?

1 Yes

2 No

END OF FILTER

END OF FILTER

*IF (type of CVD condition at last interview = RESPONSE) AND (type of CVD condition = stroke)  
[(HeDiaa (Last int) = RESPONSE) AND (HeDiaa = 8)]*

**HEAGE\***

Approximately how old [^were you/ was [^name]] when [^you were/ he was/ she was] first told by a doctor that [^you/ he/ she] had a stroke?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE30 - HE31]**

END OF FILTER

*IF (type of CVD condition = stroke) AND (type of CVD condition at Last interview = RESPONSE)  
[(HeDiaa = 8) AND (HeDiaa (Last int) = RESPONSE)]*

**HEAGER\***

When [^were you / was [^name]] first told by a doctor that [^you /he /she] had a stroke?

INTERVIEWER: Enter response in month and year

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGERY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE32 - HE33]**

END OF FILTER

*IF ((type of CVD condition = stroke) OR ((type of CVD condition at Last interview = stroke) AND (reason CVD condition disputed <> Never had condition) AND (reason CVD condition disputed <> Misdiagnosed))  
[(HeDiaa= 8) OR ((HeDiaa (Last int)= 8) AND (HeDiaN <> 1) AND (HeDiaN <> 4))]*

**HENMST\***

How many strokes, if any, [^have you/ has [^name]] had in the last 2 years, according to a doctor?

- 0 0
- 1 1
- 2 2
- 3 3 or more

*IF whether recommended medication to lower BP <> RESPONSE [Hehibpb <> RESPONSE]*

**HEHIBPB1**

Some doctors suggest that some patients take medication to lower their blood pressure.  
Did a doctor or nurse ever suggest that you take any medication to lower your blood pressure?

- 1 Yes
- 2 No

**[coded HEHBPB1 in data]**

END OF FILTER

*IF suggested medication for blood pressure <> no AND taking medication for high blood pressure = empty AND taking medication to prevent high blood pressure = empty  
[(Hehibpb1 <> No) AND (Hemda = EMPTY) AND (Hemdab = EMPTY)]*

**HEMDA1\***

^Are you / Is name currently taking any medication, tablets or pills for high blood pressure?

- 1 Yes
- 2 No

END OF FILTER

**HEPBS\***

[[^Do you / Does [^name]] have any remaining problems because of [^your/ his/ her] stroke(s)?

- 1 Yes
- 2 No

*IF whether any remaining problems because of stroke = yes [HePbs = 1]*

**HEWKS\***

[^Do you / Does [^name]] have weakness in [^your/ his/ her] arms and legs, or decreased ability to move or use them?

- 1 Yes
- 2 No

**HESPK\***

([^Do you / Does [^name]] have) any difficulty speaking or swallowing?

- 1 Yes
- 2 No

**HEVSI\***

([^Do you / Does [^name]] have) any difficulty with vision?

- 1 Yes
- 2 No

**HETHK\***

([^Do you / Does [^name]] have) any difficulty in thinking or finding the right words to say?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (type of CVD condition = angina, heart attack) OR ((type of CVD condition at last interview = angina, heart attack) AND ((whether confirms previous angina condition = yes) OR (whether confirms previous heart attack condition = yes))  
[(HeDiaa = 2, 3) OR ((HeDiaa (Last int) = 2, 3) AND ((HeDiaC = 1) OR (HeDiaC = 1)))]*

**HEHRTA\***

Some doctors suggest that some patients take anticoagulant or blood thinning medication.  
Did any doctor suggest that [^you / [^name]] take medication to thin [^your/ his/ her] blood such as warfarin or aspirin, Plavix, Ticlid, or other blood thinning medication?

- 1 Yes
- 2 No

*IF whether advised to take blood thinning medication = yes [Hehrt = 1]*

**HEHRTB\***

[^Are you / Is [^name]] currently taking medication to thin [^your / his / her] blood like Warfarin, Aspirin, Plavix, Ticlid, or other medication to thin the blood?

- 1 Yes
- 2 No

END OF FILTER

*IF whether taking blood thinning medication = yes [Hehrtb = 1]*

**HEHRTC\***

[^Are you / Is [^name]] taking Warfarin?

- 1 Yes
- 2 No

*IF whether taking warfarin = yes [Hehrtc = 1]*

**HEHRTD\***

Many doctors ask patients on Warfarin to get their blood tested regularly. The test checks how thin their blood is, and is sometimes called an INR test. [^Do you / Does [^name]] get [^your / his / her] blood checked for this?

- 1 Yes
- 2 No

*IF whether has INR test = yes [Hehrtd = 1]*

**HEHRTE\***

[^Have you / Has [^name]] had this blood test in the past 12 weeks?

- 1 Yes
- 2 No

*IF whether had INR test in past 12 weeks = yes [Hehrte = 1]*

**HEHRTF**

[^Have you / Has [^name]] had this blood test in the past 4 weeks?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER  
END OF FILTER  
END OF FILTER  
END OF FILTER

*IF (type of CVD condition = angina, heart attack, diabetes) OR ((type of CVD condition at Last interview = angina, heart attack, diabetes) AND (whether confirms previous angina condition = yes) OR (whether confirms previous heart attack condition = yes) OR (whether confirms previous diabetes condition = yes)) AND (type of CVD condition = high cholesterol)*  
*[(HeDiaa = 2, 3, 7) OR ((HeDiaa (Last int) = 2, 3, 7) AND ((HeDiaC(2) = 1) OR (HeDiaC(3) = 1) OR (HeDiaC(7) = 1) AND (HeDiaa = 9))]*

### **HECHOL**

Has any doctor talked to you about how to lower your cholesterol? This would include changing your diet, losing weight, getting more exercise, or taking medication.

- 1 Yes
- 2 No

*IF whether advised how to lower cholesterol = yes [Hechol = 1]*

### **HECHOLA**

Have you done any of these things to lower your cholesterol?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF type of CVD condition = high cholesterol OR whether still has high cholesterol = yes*  
*[(HeDiaa = 9) OR (HeDiaS = Yes)]*

### **HECHMD**

Are you / Is name currently taking any medication to lower [^your /his /her] cholesterol level?

- 1 Yes
- 2 No

*ELSEIF reason for disputing condition = no longer has condition OR whether still has high cholesterol = no OR ((whether taking medication to prevent high cholesterol at last interview = yes) AND (whether currently taking medication to lower cholesterol))*

*[(HediaN = 2) OR (HediaS = 2 OR (Hechme (Last int) = 1)) AND (HeChMd <>RESPONSE)]*

### **HECHME**

Can I just check, are you / is name taking medication which prevents you from getting high cholesterol any more?

- 1 Yes
- 2 No

END OF FILTER

**HESCRE**

I would like to ask you about any screening you may have had to check for different types of cancer.  
/"Cancer screening question"

**HEBOWC**

Have you ever completed a home testing kit for screening bowel cancer?

- 1 Yes
- 2 No

*If completed home testing kit for screening bowel cancer [HEBowC = Yes] THEN*

**HEYBOWT**

How long ago was your most recent test?

INTERVIEWER: Enter the **year** here.

: 1900..2050

**HEMBOWT**

How long ago was your most recent test?

INTERVIEWER: Enter the **month** here.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEBOWP**

Was this test part of the NHS Bowel Cancer Screening Programme?

- 1 Yes
- 2 No

END OF FILTER

*If female*

**HEMAM**

Have you ever had a mammogram (x-ray of your breasts)?

- 1 Yes
- 2 No

*If HeMam=yes*

**HEYMAMT**

How long ago was your most recent mammogram?

INTERVIEWER: Enter the **year** here.

: 1900..2050

**HEMMAMT**

How long ago was your most recent mammogram?

INTERVIEWER: Enter the **month** here.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEMAMR**

What was the reason for your most recent mammogram?

INTERVIEWER: Please code 1 if the respondent had a screening in a mobile clinic.

- 1 Routine screening by the NHS Breast Screening Programme
- 2 Non-routine referral to the NHS
- 3 Private examination
- 4 NHS screening owing to a family history of breast cancer
- 5 Follow-up after breast cancer treatment

END OF FILTER

END OF FILTER

*If male*

**HEPRO**

Have you ever had a prostate-specific antigen (PSA) blood test or other examination to screen for prostate cancer?

- 1 Yes
- 2 No

*If HePro=yes*

**HEYPROT**

How long ago was your most recent PSA test or other examination?

INTERVIEWER: Enter the **year** here."

/"When was most recent PSA test"

: 1900..2050

**HEMPROT**

How long ago was your most recent PSA test or other examination?

INTERVIEWER: Enter the **month** here.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August

09 September  
10 October  
11 November  
12 December  
END OF FILTER  
END OF FILTER

*IF ((type of chronic condition = RESPONSE) AND NOT (type of chronic condition at last interview = none))  
[((HeDiab (Last int) = RESPONSE) AND NOT (HeDiab (Last int) = 96))]*

LOOP FOR Idx:= 1 TO 9

*/F type of chronic condition at Last interview = Idx [HeDiab (Last int) = Idx]*

**HEDIAD@\***

INTERVIEWER: Please check the following sentence before reading out loud.

[^BLANK / Our records show that when we last interviewed [^you / [^name]] on [^date of last interview] [^you / he / she] said that [^you/ he/ she] had had (or had been told by a doctor [^you /he /she] had had) / Our records also show that when we last interviewed [^you / [^name]] on [^date of interview] [^you/ he/ she] said that [^you/ he/ she] had had (or had been told by a doctor [^you/ he/ she] had had)] ^chronic lung disease such as chronic bronchitis or emphysema / asthma / arthritis / osteoporosis, sometimes called thin or brittle bones / cancer or a malignant tumour / Parkinson's disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia, senility or another serious memory impairment].

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No
- 3 Not read out as didn't make sense

*[There is a separate variable for responses about each of the type of illness]  
[Responses are recoded in HEDBDLU HEDBDAS HEDBDAR HEDBDOS HEDBDCA  
HEDBDPD HEDBDPS HEDBDAD HEDBDDE HEDBDBL]*

*/F whether confirms previous chronic condition = no [HeDiaD = 2]*

**HEDIAM@\***

INTERVIEWER: Code reason why respondent disputes having had [^chronic lung disease such as chronic bronchitis or emphysema / asthma / arthritis / osteoporosis, sometimes called thin or brittle bones / cancer or a malignant tumour / Parkinson's disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia, senility or another serious memory impairment]. Respondent says...

- 1 Never diagnosed
- 2 No longer has
- 3 Did not have previously, but has now
- 4 Misdiagnosed

*[There is a separate variable for responses about each of the type of illness]  
[Responses are recoded in HEDBMLU HEDBMASHEDBDMAR HEDBDMOS HEDMCA  
HEDBMPD HEDBMPS HEDBMAD HEDBMDE]*

*/F reason disputes condition = no longer has, did not have previously, but has now [HeDiaM = 2,3]*

**HEDIAMX@**

INTERVIEWER: Did respondent have this condition at the time of the last interview?  
If yes, go to HeDiaD and code 1 (Yes).

END OF FILTER

ELSE

*IF whether confirms previous chronic condition = yes [HeDiaD = 1]*

**HEDIDS@\***

[^Do you / Does [^name]] still have [^chronic lung disease such as chronic bronchitis or emphysema / asthma / arthritis / osteoporosis, sometimes called thin or brittle bones / cancer or a malignant tumour / Parkinson's disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia, senility or another serious memory impairment]

Interviewer: If the respondent says that the condition is controlled by treatment code 'Yes'.?

1 Yes

2 No

**[There is a separate variable for responses about each of the type of illness]**

**[Responses to HEDIDSare recoded in HEDBLU HEDBSAS HEDBSAR HEDBSOS HEDSCA HEDBSPD HEDBSDE HEDBSBL]**

END OF FILTER

**HEDIAB@\***

SHOW CARD C5

[^Has / Apart from what you have already told us, and thinking about what has happened since we last saw [^you / [^name]] on [^date of last interview] has / Thinking about what has happened since we last saw [^you / [^name]] on [^date of last interview] has] a doctor [^BLANK / ever] told [^you / [^name]] that [^you have / he has / she has] (or had) any of the [^BLANK / other] conditions on this card?

INTERVIEWER: PROBE - 'What others?'...Code all that apply.

- 01 [^Chronic lung disease such as chronic bronchitis or emphysema]
- 02 [^Asthma]
- 03 [^Arthritis (including osteoarthritis , or rheumatism)]
- 04 [^Osteoporosis, sometimes called thin or brittle bones]
- 05 [^Cancer or a malignant tumour (excluding minor skin cancers)]
- 06 [^Parkinson's disease]
- 07 [^Any emotional, nervous or psychiatric problems]
- 08 [^Alzheimer's disease]
- 09 [^Dementia, senility or another serious memory impairment]

10 Malignant blood disorder, e.g. leukaemia

96 None of these

[**Multiple responses to HEDIAB are recoded in variables HEDIBLU HEDIBAS HEDIBCA HEDIBPD**

**HEDIBPS HEDIBAD HEDIBBL HEDIB96]**

**[code maximum 9 out of 10 possible responses]**

**[CHECK HE34 - HE35]**

*IF ((type of chronic condition at last interview = chronic lung disease) AND (whether confirms previous chronic condition = yes)) OR (type of chronic condition = chronic lung disease)*

*[((HeDiab (Last int) = 1) AND (HeDiaD = 1)) OR (HeDiab = 1)]*

**HELN<sup>G</sup>\***

[^Are you / Is [^name]] taking medication or other treatment for [^your/ his/ her] lung condition?

1 Yes

2 No

*IF ((disputed chronic lung condition = no longer has) OR (whether still has chronic lung disease = no) OR (was taking lung disease medication at last interview= yes)) AND (whether taking medication for condition <>RESPONSE)*

*[((HediaM = 2) OR (HedidS = 2) OR (HeLngB (last int)= Yes)) AND (HeLng <> RESPONSE)]*

**HELNGB**

Can I just check, [^are / is] [^you /[^name]] taking medication which prevents [^him /her] from getting chronic lung disease, such as chronic bronchitis or emphysema, any more?

1 Yes

2 No

END OF FILTER

END OF FILTER

*IF ((type of chronic condition at last interview = asthma) AND (whether confirms previous chronic condition = yes)) OR (type of chronic condition = asthma)*

*[((HeDiab (Last int) = 2) AND (HeDiaD = 1)) OR (HeDiab = 2)]*

**HEAMA\***

[^Are you / Is [^name]] taking medication or other treatment for [^your /his /her] asthma?

1 Yes

2 No

*IF (disputes chronic lung disease = no longer has) OR (still has chronic lung disease = no)*

*[(HediaM = 2) OR (HedidS = 2)]*

**HEAMB**

Can I just check, ^[are/is] ^[you/name] taking medication which prevents ^[him/her] from getting asthma any more?

1 Yes

2 No

END OF FILTER

END OF FILTER

*IF type of chronic condition = arthritis [HeDiab = 3]*

**HEART@\***

May I check, which type or types of arthritis [^do you / does [^name]] have...

INTERVIEWER: Read out each in turn and code all that apply....

1 Osteoarthritis?

2 Rheumatoid arthritis?

3 Some other kind of arthritis?

**[Multiple responses to HEART are recoded in variables HEARTOA HEARTRA HEARTOT]  
[code maximum 3 out of 3 possible responses]**

*IF ((type of chronic condition at Last interview <> RESPONSE) AND (type of chronic condition = arthritis)) OR ((type of chronic condition at last interview = arthritis) AND (whether confirms previous chronic condition = yes) AND (age first told had arthritis at last interview <> RESPONSE))*

*[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 3)) OR ((HeDiab (Last int) = 3) AND (HeDiaD = 1) AND (HeAgf (Last int) <> RESPONSE))]*

**HEAGF\***

Approximately how old [^were you / was [^name]] when [^you were /he was /she was] first told by a doctor that [^you /he /she] had arthritis?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE36]**

ELSE

*IF ((type of chronic condition = arthritis) AND (type of chronic condition = RESPONSE))  
AND NOT (type of chronic condition at Last interview = arthritis)*

*[((HeDiab = 3) AND (HeDiab (Last int) = RESPONSE)) AND NOT (HeDiab (Last int) = 3)]*

**HEAGFR\***

When [^were you / was [^name]] first told by a doctor that [^you /he /she] had arthritis?

INTERVIEWER: Enter response in month and year.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**HEAGFRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE37 - HE38]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (type of arthritis = osteoarthritis) OR ((type of arthritis at Last interview = osteoarthritis) AND (type of chronic condition at Last interview = arthritis) AND (whether confirms previous chronic condition = yes))  
[(HeArt = 1) OR ((HeArt (Last int) = 1) AND (HeDiab (Last int) = 3) AND (HeDiaD = 1))]*

#### **HEARTA**

Has any doctor or nurse ever talked to you about...

What your arthritis or joint pain will be like as time goes on?

1 Yes

2 No

#### **HEARTB**

(Has any doctor or nurse ever talked to you about...)

How to keep your arthritis or joint pain from getting worse?

1 Yes

2 No

#### **HEARTC**

(Has any doctor or nurse ever talked to you about...)

How your arthritis or joint pain will be treated?

1 Yes

2 No

*IF whether told how arthritis pain will be treated = yes [HeArtc = 1]*

#### **HEARTD**

(Has any doctor or nurse ever talked to you about...)

what the specific purpose of the treatment for your arthritis or joint pain is?

1 Yes

2 No

END OF FILTER

#### **HEARTE**

Some doctors suggest trying paracetamol as the first medication for arthritis or joint pain.

Did any doctor or nurse recommend you try paracetamol before other medicines for your joint pain?

1 Yes

2 No

END OF FILTER

*IF current chronic health condition = malignant blood disorder OR current blood disorder at last interview  
<> RESPONSE AND confirming previous malignant blood disorder = yes  
[(HeDiab = 10) OR ((HeLeuk (Last int) <> RESPONSE) AND (Hediad = 1))]*

**HELEUK**

^[Do you / Does name]have one of the following blood disorders...

INTERVIEWER: Read out...

- 1 ...leukaemia,
- 2 ...lymphoma,
- 3 or some other blood disorder?

END OF FILTER

*IF ((type of chronic condition at last interview = osteoporosis) AND (whether confirms previous chronic condition = yes)) OR (type of chronic condition = osteoporosis)  
[((HeDiab (Last int) = 4) AND (HeDiaD = 1)) OR (HeDiab = 4)]*

**HEOSTE**

Has any doctor or nurse recommended taking calcium pills or Vitamin D?

- 1 Yes
- 2 No

*IF (whether advised to take calcium/vitamin D pills = yes) [HeOste = 1]*

**HEOSTEA\***

[^Do you / Does [^name]] take calcium pills or Vitamin D for [^your /his /her] osteoporosis or 'thin bones'?

- 1 Yes
- 2 No

END OF FILTER

**HEOSTEB**

Did a doctor or nurse recommend treatment with medication for [^your /his /her] osteoporosis or 'thin bones'?

- 1 Yes
- 2 No

*IF whether recommended osteoporosis medication = yes [HeOsteb = 1]*

**HEOSTEC**

Did [^you / [^name]] take any of them?

- 1 Yes
- 2 No

**HEOSTED**

Were these medicines recommended within 3 months of a doctor telling you that you had osteoporosis?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF ((type of chronic condition at last interview <> RESPONSE) AND (type of chronic condition = cancer)) OR ((type of chronic condition at last interview = cancer) AND (whether confirms previous chronic condition = yes) AND (age first told had cancer at last interview <> RESPONSE))  
[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 5)) OR ((HeDiab (Last int) = 5) AND (HeDiaD = 1) AND (HeAgg (Last int) <> RESPONSE))]*

**HEAGG\***

Approximately how old [^were you / was [^name]] when [^you were /he was /she was] first told by a doctor that [^you / he / she] had cancer or a malignant tumour?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE39 – HE40]**

ELSE

*IF ((type of chronic condition = cancer) AND (type of chronic condition at last interview = RESPONSE) AND NOT (type of chronic condition at Last interview = cancer))  
[((HeDiab = 5) AND (HeDiab (Last int) = RESPONSE) AND NOT (HeDiab (Last int) = 5))]*

**HEAGGR\***

When in the last two years [^were you / was [^name]] first told by a doctor that [^you /he / she] had cancer or a malignant tumor?

INTERVIEWER: Enter response in month and year. Enter month here.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGGRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

*IF blood disorders = leukaemia or lymphoma [HeLeuk =1,2 ]*

**HEAGK**

Approximately how old [^were you / was name] when [^you /he /she] [^were /was] first told by a doctor that [^you / he / she] had leukaemia or lymphoma?

INTERVIEWER: Enter age in years.

Range: 0..110

**HEAGKR**

When [^were you / was name] when ^[you /he /she] ^[were /was] first told by a doctor that ^[you / he /she] had leukaemia or lymphoma?

INTERVIEWER: Enter response in month and year.

Enter month here.

**HEAGKRY**

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

END OF FILTER

**[CHECK HE41 - HE42]**

END OF FILTER

END OF FILTER

*IF type of chronic condition = cancer [HeDiab = 5]*

**HECANAA\***

SHOW CARD C6

In which part of [^your / [^name's]] body did [^your /his /her] (cancer /cancers / malignant tumour) start?

INTERVIEWER: Code one only.

- 1 Lung
- 2 Breast
- 3 Colon, bowel or rectum
- 4 Lymphoma
- 5 Leukaemia
- 6 Melanoma or other skin cancer
- 7 Prostate
- 95 Somewhere else

**HECANB\***

During the last two years [^have you /has [^name]] received any treatment for [^your /his /her] cancer?

- 1 Yes
- 2 No

END OF FILTER

*IF blood disorders = leukaemia or lymphoma OR (blood disorders at last interview = leukaemia or lymphoma AND whether still has malignant blood disorders <> no longer has, misdiagnosed)  
[(HeLeuk = 1,2) OR ((HeLeuk (last int) = 1,2) AND (HeDiaM <> 2) AND (HeDiaM <> 4))]*

**HECANBB**

During the last two years, [^his/her] [^you/[^name]] received any treatment for [^his/her] leukaemia or lymphoma?

- 1 Yes
- 2 No

END OF FILTER

*IF ((type of chronic condition <> RESPONSE) AND (type of chronic condition = Parkinson's disease))  
OR ((type of chronic condition at last interview = Parkinson's disease) AND (whether confirms previous chronic condition = yes) AND (age first told had Parkinson's disease <> RESPONSE))  
[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 6)) OR ((HeDiab (Last int) = 6) AND (HeDiaD = 1) AND (HePrk <> RESPONSE))]*

**HEPRK\***

Approximately how old [^were you / was [^name]] when [^you were / he was / she was] first told by a doctor that [^you / he / she] had Parkinson's disease?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE43 - HE44]**

ELSE

*IF ((type of chronic condition = Parkinson's disease) AND (type of chronic condition at last interview = RESPONSE) AND NOT (type of chronic condition at Last interview = Parkinson's disease))  
[((HeDiab = 6) AND (HeDiab (Last int) = RESPONSE) AND NOT (HeDiab (Last int) = 6))]*

**HEPRKR\***

When [^were you / was [^name]] first told by a doctor that [^you / he / she] had Parkinson's disease?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEPRKRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE45 - HE46]**

END OF FILTER

END OF FILTER

*IF ((type of chronic condition at last interview <> RESPONSE) AND (type of chronic condition = psychiatric problems)) OR ((type of chronic condition at last interview = psychiatric problems) AND (whether confirms previous chronic condition = yes) AND (age first told had psychiatric problems at last interview <> RESPONSE))  
[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 7)) OR ((HeDiab (Last int) = 7) AND (HeDiaD = 1) AND (HeAgh (Last int) <> RESPONSE))]*

**HEAGH\***

Approximately how old [^were you / was [^name]] when [^you were / he was / she was] first told by a doctor that [^you / he / she] had emotional, nervous or psychiatric problems?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE47]**

END OF FILTER

*IF (type of chronic condition = psychiatric problems) AND (type of chronic condition at Last interview = RESPONSE)*

*[(HeDiab = 7) AND (HeDiab (Last int) = RESPONSE)]*

**HEAGHR\***

When [^were you / was [^name]] told by a doctor that [^you /he /she] had emotional, nervous or psychiatric problems?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**HEAGHRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE48 - HE49]**

END OF FILTER

*IF type of chronic condition = psychiatric problems [HeDiab = 7]*

**HEPSY@\***

SHOW CARD C7

What type of emotional, nervous or psychiatric problems [^do (did) you /does (did) [^name]] have?

INTERVIEWER: PROBE - 'What others?'

Code all that apply.

Include panic attacks under 'anxiety'

- 1 Hallucinations
- 2 Anxiety
- 3 Depression
- 4 Emotional problems
- 5 Schizophrenia
- 6 Psychosis
- 7 Mood swings
- 8 Manic depression
- 95 Something else

*[Multiple responses to HEPsy are recoded in variables HEPSYHA HEPSYAN HEPSYDE  
HEPSYEM HEPSYSC HEPSYPS HEPSYMO HEPSYMA HEPSY95]*

**[code maximum 9 out of 9 possible responses]**

END OF FILTER

*IF ((type of chronic condition at last interview <> RESPONSE) AND (type of chronic condition = psychiatric problems)) OR ((type of chronic condition at last interview = psychiatric problem) AND (whether confirms previous psychiatric condition = yes) AND NOT (type of chronic condition = psychiatric problems))  
[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 7)) OR ((HeDiab (Last int) = 7) AND (HeDiaD = 1) AND NOT (HeDiab = 7))]*

**HEYRC\***

During the last two years [^have you /has [^name]] had emotional, nervous or psychiatric problems?

- 1 Yes
- 2 No

END OF FILTER

*IF ((type of chronic condition at last interview <> RESPONSE) AND (type of chronic condition = Alzheimer's)) OR ((type of chronic condition at last interview = Alzheimer's) AND (whether confirms previous psychiatric problem = yes) AND (age first told had Alzheimer's at last interview = RESPONSE))  
[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 8)) OR ((HeDiab (Last int) = 8) AND (HeDiaD = 1) AND (HeAgi (Last int) <> RESPONSE))]*

**HEAGI\***

Approximately how old [^were you / was [^name]] when [^you were /he was /she was] first told by a doctor that [^you / he / she] had Alzheimer's Disease?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE50 - HE51]**

ELSE

*IF ((type of chronic condition = Alzheimer's) AND (type of chronic condition = RESPONSE) AND NOT (type of chronic condition at last interview = Alzheimer's))  
[((HeDiab = 8) AND (HeDiab (Last int) = RESPONSE) AND NOT (HeDiab (Last int) = 8))]*

**HEAGIR\***

When [^were you / was [^name]] told by a doctor that [^you /he /she] had Alzheimer's Disease?

INTERVIEWER: Enter response in month and year.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November

12 December

**HEAGIRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE52 - HE53]**

END OF FILTER

END OF FILTER

*IF ((type of chronic condition at Last interview <> RESPONSE) AND (type of chronic condition = memory impairment)) OR ((type of chronic condition at Last interview = memory impairment) AND (whether confirms previous chronic condition = yes) AND (age first told had memory impairment at Last interview <> RESPONSE))*

*[((HeDiab (Last int) <> RESPONSE) AND (HeDiab = 9)) OR ((HeDiab (Last int) = 9 AND (HeDiaD = 1) AND (HeAgi (Last int) <> RESPONSE)))]*

**HEAGJ\***

Approximately how old [^were you /was [^name]] when [^you were /he was /she was] first told by a doctor that [^you /he /she] had dementia, senility or any other serious memory impairment?

INTERVIEWER: Enter age in years.

Range: 0..110

**[CHECK HE54 - HE55]**

ELSE

*IF ((type of chronic condition = memory impairment) AND (type of chronic condition at last interview = RESPONSE) AND NOT (type of chronic condition at Last interview = memory impairment))*

*[((HeDiab = 9) AND (HeDiab (Last int) = RESPONSE) AND NOT (HeDiab (Last nt) = 9))]*

**HEAGJR\***

When in the last two years [^were you / was [^name]] first told by a doctor that [^you /he /she] had dementia, senility or any other serious memory impairment?

INTERVIEWER: Enter the response as month and year.

Enter the month at this question.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**HEAGJRY\***

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK HE56 - HE57]**

END OF FILTER

END OF FILTER

*IF (Age of respondent >= 60) [IAgeOf >= 60]*

**HEFLA**

[^Have / Since we last talked to you on [^<date of last interview>] have] you fallen down  
[^BLANK / in the last two years] (for any reason)?

- 1 Yes
- 2 No

*IF whether fallen down = yes [HeFla = 1]*

**HEFLB**

How many times have you fallen down [^since we last talked to you on [^<date of last interview>]/  
in the last two years]?

Range: 0..400

**[CHECK HE58]**

**HEFLC**

In [^any of these falls / that fall], did you injure yourself seriously enough to need medical  
treatment?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

**HEFRAC**

Have you [^BLANK / ever] fractured your hip since we last talked to you on [^<date of last interview>]?

- 1 Yes
- 2 No

*IF person's age >= 60 [IAgeOf >= 60]*

**HEJI\***

[^Have you / Has [^name]] [^BLANK / ever] had any joint replacements since we last talked  
to [^you / him / her] on [^date of last interview]?

- 1 Yes
- 2 No

*IF whether had joint replacements = yes [HeJi = 1]*

**HEJIAA\***

HeJiaa

Which joints did ^youname[pnum] have

replaced/resurfaced ^ever/ since the last interview?

INTERVIEWER:@|PROBE - 'What others?'

Code all that apply.

- 1 Right hip
- 2 Left hip
- 3 Right knee
- 4 Left knee
- 5 Other joint

**[Multiple responses to HEJIA are recoded in variables HEJIAA1 to HEJIAA5]  
[code maximum 5 out of 5 possible responses]**

*If HeJiaa= right hip (HEJiaa1=1)*

**HeJibRH\***

"Was the **right** hip replacement/resurfacing because of arthritis, a fracture, to replace a previous artificial hip, or for some other reason?

INTERVIEWER: Enter the main reason.

- 1 Arthritis,
- 2 Fracture,
- 3 Replacement of a previous artificial hip
- 95 Other reason

END FILTER

*If HeJiaa= Left Hip (HEJiaa2=1)*

**HeJibLH\***

"Was the **left** hip replacement because of arthritis, a fracture, to replace a previous artificial hip, or for some other reason?

INTERVIEWER: Enter the main reason.

- 1 Arthritis,
- 2 Fracture,
- 3 Replacement of a previous artificial hip
- 95 Other reason

END FILTER

*If HeJiaa= Right Knee (HEJiaa3=1)*

**HeJibRK\***

Was the **right** knee replacement because of arthritis, a fracture, to replace a previous artificial knee, or for some other reason?

INTERVIEWER: Enter the main reason.

- 1 Arthritis,
- 2 Fracture,
- 3 Replacement of a previous artificial knee
- 95 Other reason

END FILTER

*If HeJiaa= Left Knee (HEJiaa4=1)*

**HeJibLK\***

Was the **left** knee replacement because of arthritis, a fracture, to replace a previous artificial knee, or for some other reason?

INTERVIEWER: Enter the main reason."

- 1 Arthritis,
- 2 Fracture,
- 3 Replacement of a previous artificial knee
- 95 Other reason

END OF FILTER

*If joints replaced = right hip, left hip, right knee, left knee, other joint  
[HeJiaa =RESPONSE]*

**HEJION\***

Has [^your/[<sup>^name's</sup>]] joint replacement/resurfacing been paid for privately or by the NHS?

INTERVIEWER: Count as NHS if the operation was on private premises but paid for by the NHS. Count as private if the operation was on NHS premises but paid for privately. Include all joint replacement operations if respondent has had more than one.

1 Privately/under insurance

2 NHS

3 SPONTANEOUSLY: Both

END OF FILTER

END OF FILTER

END OF FILTER

**HEIQA\*\***

SHOW CARD C8

Now we want you to remember what [^name] was like [^two years ago and to compare it with what [^he / she] is like now. [^BLANK / Two years ago was in 2010/11]. I will read out situations where [^name] has to use [^his / her] memory or intelligence and we want you to indicate whether this has improved, stayed the same or got worse in that situation [^over the past two years / since [^<date of last interview>]]. Note the importance of comparing [^name's] present performance with [^two years ago / when we last talked to you on [^date of last interview]]. So if [^two years ago / when we last talked to you on [^<date of last interview>]] [^name] always forgot where [^he / she] had left things, and [^he / she] still does, then this would be considered 'Hasn't changed much'.

Please indicate the changes you have observed giving the appropriate answer from the card.

1 Press <1> and <Enter> to continue

2 Unable to answer - does not know what the person was like two years ago  
[Don't Know and Refusal are not allowed]

*If whether can answer questions about participant's memory = continue [Heiqa = 1]*

**HEIQB\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering things about family and friends, like occupations, birthdays or addresses?

1 Much improved

2 A bit improved

3 Not much change

4 A bit worse

5 Much worse

**HEIQC\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering things that have happened recently?

1 Much improved

2 A bit improved

- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQD\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at recalling conversations a few days later?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQE\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering [^his /her] address and telephone number?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQF\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering what day and month it is?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQG\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering where things are usually kept?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQH\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at remembering where to find things which have been put in a different place from usual?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQI\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at knowing how to work familiar machines around the house?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQJ\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at learning to use a new gadget or machine around the house?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQK\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at learning new things in general?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQL\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at following a story in a book or on TV?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQM\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at making decisions on everyday matters?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQN\*\***

**SHOW CARD C8**

Compared with two years ago, how is [^name] at handling money for shopping?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQO\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at handling financial matters, like the pension or dealing with the bank?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQP\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at handling other everyday arithmetic problems, like knowing how much food to buy, or knowing how long between visits from family or friends?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQQ\*\***

SHOW CARD C8

Compared with two years ago, how is [^name] at using intelligence to understand what's going on and to reason things through?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

END OF FILTER

**HEPAIN**

Are you often troubled with pain?

- 1 Yes
- 2 No

*IF whether often troubled with pain = yes [HePain = 1]*

**HEPAA**

How bad is the pain most of the time? Is it...

INTERVIEWER: Read out...

INTERVIEWER: Include people who experience intermittent pain often.

- 1 mild,
- 2 moderate,
- 3 or, severe

*IF pain is moderate or severe most of the time = yes [HePaa = 2,3]*

**HEPAG**

How long has the pain been bothering you? Has it been...

- 1 less than 3 months

2 more than 3 months, but less than 6 months  
3 more than 6 months, but less than 12 months  
4 or more than 12 months?

*IF length of time pain has been bothering = less than 12 months [HePag = 1,2,3]*

**HEPAJ**

Are you currently receiving any treatment for your pain?

- 1 Yes
- 2 No

*IF currently receiving treatment for pain = yes [HePaj = 1]*

**HEPAK3**

How well does the treatment control your pain?

INTERVIEWER: Read out...

- 1 Very well
- 2 Fairly well
- 3 Not very well
- 4 Not at all

END OF FILTER

END OF FILTER

END OF FILTER

**HEPAWH@**

SHOW CARD C9

In which parts of the body do you feel pain?

CODE ALL THAT APPLY.

- 1 Back
- 2 Hips
- 3 Knees
- 4 Feet
- 5 Mouth/teeth
- 6 Other
- 7 All over

**[Multiple responses to HEPAWH are recoded in variables HEPAWBA HEPAWHI HEPAWKN  
HEPAWFE HEPAWMO HEPAWOT HEPAWAL]**

**HEPAB**

How would you rate your pain if you were walking on a flat surface?

Please rate your pain from 0-10 for each of the following where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine.

- 1 Press <1> and enter to continue
- 2 Can't walk or never walks

*IF rating pain when walking = can't walk [HEPab = 2]*

**HEPAB1**

Interviewer check whether ever walks on a flat surface – include across their room at home, even if they only walk very slowly. Only code 1 if they say no

- 1 Confirms never walks or cannot walk
- 2 Does sometimes walk on a flat surface

END OF FILTER

*IF rating pain when walking = continue [HePab = 1]*

#### **HEBCK**

(How would you rate the pain) in your back?

PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

#### **HEHIP**

(How would you rate the pain) in your hips?

PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

#### **HEKNE**

(How would you rate the pain) in your knees?

PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

#### **HEFET**

(How would you rate the pain) in your feet?

PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

END OF FILTER

END OF FILTER

*IF (knee pain rating =[1 .. 10] AND (type of arthritis = osteoarthritis) [(HEKne =[1..10]) AND (HeArt=1)]*

#### **HEKNEA**

How long has the pain in your knee been bothering you? Has it been...

- 1 less than 3 months,
- 2 more than 3 months but less than 6 months,
- 3 more than 6 months, but less than 12 months,
- 4 or more than 12 months?

*IF length of knee pain = more than 3 months [HeKnea = 2,3,4]*

#### **HEKNEB**

Has a doctor or nurse suggested physiotherapy or that you attend a supervised exercise program for your knee pain?

- 1 Yes
- 2 No

*IF whether exercise / physiotherapy has been recommended for knee pain = yes*

[HeKneb = 1]

**HEKNEC**

Did you see a physiotherapist or attend a supervised exercise program for your knee pain?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

END OF FILTER

*IF (length of knee pain = more than 6 months) AND (type of arthritis = osteoarthritis) AND (knee pain rating = 6 or above)*

[HeKnea =2,3 AND HeArt=1 AND HeKne > 5]

**HEKNED**

Have you done any other type of exercise to control your knee pain?

- 1 Yes
- 2 No

END OF FILTER

*IF (knee pain rating = 6 or above OR hip pain rating = 6 or above) AND (type of arthritis = osteoarthritis)  
AND ( hip pain rating = 6 or above)  
[(HeKne = [6..10] OR HeHip= [6..10]) AND (HeArt = 1) AND (HeHip IN [6..10])]*

**HEHIPA**

How long has the pain in your hips been bothering you? Has it been...

- 1 less than 3 months,
- 2 more than 3 months but less than 6 months,
- 3 more than 6 months, but less than 12 months,
- 4 or more than 12 months?

**HEHIPB**

Have you done any exercise to control your hip pain?

INTERVIEWER: This includes both supervised and unsupervised exercise.

- 1 Yes
- 2 No

*IF done exercise for hip pain = 1 [HeHipB = 1]*

**HEPMED**

Are you taking any medication for your ^[knee /hip] pain?

- 1 Yes
- 2 No

**HEKNEF@**

Does your treatment, whether medication or exercise, control your knee pain?

- 1 Yes
- 2 No

**HEHIPC**

Does your treatment, whether medication or exercise, control your hip pain?

- 1 Yes
- 2 No

*IF taking medication for knee / hip pain = no [HePMed = 2]*

**HEPSUR@**

Has a doctor or surgeon recommended that you should have surgery or joint replacement?

- 1 Yes
- 2 No

*IF surgery recommended = yes [HepSur = 1]*

**HEPORTH@**

Did you see an orthopaedic specialist?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**HEANINT to HEHRTMD** removed  
**HEROSMD to HERPJ** removed  
**HECDA to HECDF** removed

**HEADLA@\***

SHOW CARD C10

Because of a health problem, [^do you /does he /does she] have difficulty doing any of the activities on this card? Exclude any difficulties that you expect to last less than three months  
INTERVIEWER: PROBE - 'What others?'...Code all that apply.

- 01 Walking 100 yards
- 02 Sitting for about two hours
- 03 Getting up from a chair after sitting for long periods
- 04 Climbing several flights of stairs without resting
- 05 Climbing one flight of stairs without resting
- 06 Stooping, kneeling, or crouching
- 07 Reaching or extending [^your / his / her] arms above shoulder level (either arm)
- 08 Pulling or pushing large objects like a living room chair
- 09 Lifting or carrying weights over 10 pounds, like a heavy bag of groceries
- 10 Picking up a 5p coin from a table
- 96 None of these

*[Multiple responses to HEADLA are recoded in variables HEMOBWA HEMOBSI HEMOBCH HEMOBCS HEMOBCL HEMOBST HEMOBRE HEMOPBU HEMOBLI HEMOBPI HEMOB96]  
[code maximum 10 out of 11 possible responses]*

**[CHECK HE59]**

**HEADLB@\***

SHOW CARD C11

Here are a few more everyday activities. Please tell me if [^you have / [^name] has] 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 /does he /does she] have difficulty doing any of the activities on this card?

INTERVIEWER: PROBE - 'What others?'...Code all that apply.

- 01 Dressing, including putting on shoes and socks
- 02 Walking across a room
- 03 Bathing or showering
- 04 Eating, such as cutting up [^your / his / her] food
- 05 Getting in or out of bed
- 06 Using the toilet, including getting up or down
- 07 Using a map to figure out how to get around in a strange place
- 08 Recognising when you are in physical danger
- 09 Preparing a hot meal
- 10 Shopping for groceries
- 11 Making telephone calls
- 12 Communication (speech, hearing or eyesight)
- 13 Taking medications
- 14 Doing work around the house or garden
- 15 Managing money, such as paying bills and keeping track of expenses
- 96 None of these

*[Multiple responses to HEADLB are recoded in variables HEADLDR HEADLWA HEADLBA HEADLEA HEADLBE HEADLWC HEADLMA HEADLPR HEADLSH HEADLPH HEADLME HEADLHO]*

**HEADLMO HEADLB14 HEADLB15 HEADLB96]**  
**[code maximum 13 out of 14 possible responses]**

**[CHECK HE60]**

## **SOCIAL CARE**

*IF reported at least one difficulty with an ADL or IADL at Headla or Headlb  
[(Headla<>96 or Headlb<>96)]*

### **CATINT\***

I have just asked about difficulties [<sup>^</sup>you/[<sup>^</sup>name]] may have with some activities. I'd now like to ask about any help [<sup>^</sup>you/[<sup>^</sup>name]] [<sup>^</sup>have/has] received in the last month, even if [<sup>^</sup>you/[<sup>^</sup>name]] [<sup>^</sup>do/does] not usually need any help.

Please only think about help [<sup>^</sup>you/[<sup>^</sup>name]] [<sup>^</sup>have/has] received because of a physical, mental, emotional or memory problem.

INTERVIEWER: Press 1 and <Enter> to continue.

### **CATKA\***

[^Have/Has] [<sup>^</sup>you/[<sup>^</sup>name]] received help from anyone with walking 100 yards, in the last month?

INTERVIEWER: Include help even if it was for a short time or provided by husband/ wife/ another family member.

01 Yes

02 No

### **CATKB\***

What about climbing several flights of stairs without resting?

EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

ASK IF NECESSARY: [^Have/Has] [<sup>^</sup>you/[<sup>^</sup>name]] received help from anyone with climbing several flights of stairs without resting, in the last month?

01 Yes

02 No

### **CATKC\***

What about climbing one flight of stairs without resting?

EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

ASK IF NECESSARY: [^Have/Has] [<sup>^</sup>you/[<sup>^</sup>name]] received help from anyone with climbing one flight of stairs without resting, in the last month?

01 Yes

02 No

### **CATKD\***

What about dressing, including putting on shoes and socks?

EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

ASK IF NECESSARY: [^Have/Has] [<sup>^</sup>you/[<sup>^</sup>name]] received help from anyone with dressing, including putting on shoes and socks, in the last month?

01 Yes

02 No

### **CATKE\***

What about walking across a room?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with walking across a room, in the last month?

01 Yes

02 No

#### **CATKF\***

What about bathing or showering?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with bathing or showering, in the last month?

01 Yes

02 No

#### **CATKG\***

What about eating, such as cutting up food?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with eating, such as cutting up food, in the last month?

01 Yes

02 No

#### **CATKH\***

What about getting in or out of bed?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with getting in or out of bed, in the last month?

01 Yes

02 No

#### **CATKI\***

What about using the toilet, including getting up or down?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with using the toilet, including getting up or down, in the last month?

01 Yes

02 No

#### **CATKJ\***

What about shopping for groceries?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[<sup>^name</sup>]] received help from anyone with shopping for groceries, in the last month?

01 Yes

02 No

#### **CATKK\***

What about taking medications?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[^name]] received help from anyone with taking medications, in the last month?

01 Yes

02 No

#### **CATKL\***

What about doing work around the house or garden?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[^name]] received help from anyone with doing work around the house or garden, in the last month?

01 Yes

02 No

#### **CATKM\***

What about managing money, such as paying bills and keeping track of expenses?

**EXPLAIN IF NECESSARY:** Include help even if it was for a short time or provided by husband/ wife/ another family member.

**ASK IF NECESSARY:** [^Have/Has] [^you/[^name]] received help from anyone with managing money, such as paying bills and keeping track of expenses, in the last month?

01 Yes

02 No

*IF number of activities respondent has received help with excluding shopping, housework or managing money (computed) = 0 AND (help with shopping = yes OR help with work around house/garden = yes OR help with managing money = yes)*

*[(CaTNoB = 0) AND ((CaTkJ = 1) OR (CaTkL = 1) OR(CaTkM = 1))]*

#### **CATCH\***

[^Do/Does] [^you/[^name]] receive this help with [^shopping for groceries/doing work around the house or garden/managing money] because of a physical, mental, emotional or memory problem?:

01 Yes for some or all

02 No, none of this help is because of a physical, mental, emotional or memory problem

END OF FILTER

*IF derived number of activities respondent received help with in the last month >0 AND whether receive help due to a physical/mental/emotional or memory condition <> no*

*[(CaTNo > 0) AND (CaTCh <> 2)]*

#### **CAWIN\***

I am now going to ask you some questions about who helps [you/[^name]] with different things. I will show you two lists of people who may have helped [you/[^name]].

1 Press <1> and <Enter> to continue.

LOOP FOR EACH ACTIVITY SET MENTIONED

#### **(1) MOBILITY**

*IF whether has had help walking 100 yards / climbing several flights of stairs without resting / climbing one flight of stairs without resting / walking across a room / getting in or out of bed/ using a toilet = yes*

*[(CaTkA = 1) OR (CaTkB = 1) OR (CaTkC = 1) OR (CaTkE =1) OR (CaTkH = 1) OR (CaTkI = 1)]*

**(2) WASHING**

*IF whether has had help dressing / bathing or showering = yes [(CaTkD = 1) OR (CaTkF = 1)]*

**(3) EATING**

*IF whether has had help eating = yes [CaTkG = 1]*

**(4) SHOPPING/ WORK DONE AROUND THE HOUSE**

*IF whether has had help shopping for groceries/doing work around the house or garden = yes [(CaTkJ = 1) OR (CaTkL = 1)]*

**(5) TAKING MEDICATION**

*IF whether has had help taking medication(s) = yes [CaTkK = 1)*

**(6) MANAGING MONEY**

*IF whether has had help shopping for groceries/doing work around house or garden = yes [CaTkM = 1]*

**CAHIN\***

## SHOW CARD C12

In the last month, who has helped [^you/[^name]] with [^BLANK/ walking 100 yards/climbing stairs/walking across a room/getting in or out of bed/ using the toilet/ dressing/ bathing or showering/eating/ shopping for groceries/doing work around the house or garden/taking medications/managing money]?

First, please tell me about all of the people from this list who have helped [^you/[^name]].

Please only think about help received because of a physical, mental, emotional or memory problem.

INTERVIEWER: PROBE - 'Does anyone else help with these activities?'

CODE ALL THAT APPLY.

01 Husband/Wife/Partner

02 Son (including step son, adopted son or son in law)

03 Daughter (including step daughter, adopted daughter or daughter in law)

04 Grandchild (including Great Grandchildren)

05 Sister (including step sister, adopted sister or sister in law)

06 Brother (including step brother, adopted brother or brother in law)

07 Other relative

08 Friend

09 Neighbour

96 None of these

**[CHECK SC1]****CAHFO\***

## SHOW CARD C13

Now, please tell me about all of the people from this list who have helped [^you/[^name]] with [^BLANK/ walking 100 yards/climbing stairs/walking across a room/getting in or out of bed/ using the toilet/ dressing/ bathing or showering/eating/ shopping for groceries/doing work around the house or garden/taking medications/managing money] in the last month?

INTERVIEWER: PROBE - 'Does anyone else help with these activities?'

CODE ALL THAT APPLY.

01 Home care worker/ home help/ personal assistant

02 A member of the reablement / intermediate care staff team

03 Voluntary helper

04 Warden / Sheltered housing manager

05 Cleaner

06 Council's handyman

07 Member of staff at the care/nursing home

95 Other - please specify

96 None of these

**[CHECK SC2]**

*IF formal provider = other [CaHFo = 95]*

**CAHFOO\***

Who was the other person that helped [^you/[^name]]?

STRING[100]

END OF FILTER

END FILTER

**CAHPC\***

Thinking about all the help [^you/he/she] receive(s), would you say that the help [^you/he/she] receive(s)...?

INTERVIEWER: Read out...

01 ...Meets [^your/his/her] needs all the time,

02 usually meets [^your/his/her] needs,

03 sometimes meets [^your/his/her] needs,

04 or, hardly ever meets [^your/his/her] needs?

END OF FILTER

*LOOP FOR ALL INFORMAL CARE GIVERS FROM CAHIN WHO PROVIDE HELP EXCEPT NEIGHBOUR/OTHER CARE GIVERS (care giver = husband/wife/partner, son(s), daughter(s), grandchild(ren), sister(s), brother(s), other relative(s), friend(s))*

*IF [PAskhelp = 1] (PAskhelp is a computed variable)*

**CAFAM**

You have told me that [^your/his/her] [^husband /wife /partner /son /other son /daughter /other daughter /grandchild /other grandchild /sister /other sister /brother /other brother / other relative/friend/ other friend] helped [^you/[^name]]. Can I just check, does this person live in the same household as [^you/[^name]]?

01 Yes

02 No

*IF whether care giver lives in household = yes [CaFam = 1]*

**CAPNO**

Please enter person number

Household Member 01 to 16

**[CHECKS SC3-5]**

END OF FILTER

END OF FILTER

*IF whether care giver lives in household <> yes [CaFam <> 1]*

**CANAM**

^You have told me that [^your /his /her] [^husband /wife /partner /son /other son /daughter /other daughter /grandchild /other grandchild /sister /other sister /brother /other brother / other relative/friend / other friend/ neighbour /other neighbour] helped [^you/[^name]].

What is [^your /his /her] [^husband's /wife's /partner's /son's /other son's /daughter's /other daughter's /grandchild's /other grandchild's /sister's / other sister's /brother's /other brother's / other relative's / friend's / other friend's / neighbour's /other neighbour's] name?

STRING[20]

*IF care giver = grandchild, relative, friend, neighbour or other care giver [PAskSex = 1]  
(PAskSex is a computed variable)*

**CASEX**

INTERVIEWER CODE OR ASK SEX OF PERSON WHO HELPS

01 Male

02 Female

END OF FILTER

LOOP FOR ALL CARE GIVERS EXCEPT HUSBAND/ WIFE/ PARTNER

*For ploop:= 2 to 16*

**CAMOR**

Did an other [^son/ daughter/ grandchild/ sister/ brother/ other relative/ friend/ neighbour] help [^you/ [^name]]?

01 Yes

02 No

END OF FILTER

END OF FILTER

*IF derived formal care provider = home care worker/home help/personal assistant  
[CaHn[21]=1] (CaHn is a computed variable)*

**CAHHA**

You have told me that a home care worker/home help/personal assistant helped [^you/ [^name]] in the last month.

[^Do/Does] [^you/ [^name]] have just one person helping [^you /him /her], or [^do /does] [^you/ [^name]] have more than one?

01 One,

02 More than one

*IF number of formal providers = more than one [CaHHA=2]*

**CAHHB**

Do they all help with the same kinds of things, or [^do/does] [^you/[^name]] have different people helping with different things?

01 All help with same kind of things,

02 Different people help with different things

*IF help provided = different people help with different things [CaHHb=2]*

**CAHHC**

[^BLANK/ I'd like you to think about the home care workers, home helps or personal assistants who help with different things, so that I can ask you about each of them later.

Thinking of the [^first/second/third] home care worker / home help / personal assistant, what sort of things do they help [^you/[^name]] with?

CODE MAIN TASK

- 01 Getting up in the morning,
- 02 Going to bed,
- 03 Washing/ bathing/ personal care,
- 04 Meals/ eating,
- 05 Getting out of the house/ shopping,
- 06 Cleaning/ laundry,
- 07 Other

**[CHECK SC6]**

**CAHHD**

Are there any more home care workers, home helps or personal assistants who help [^you/[^name]] with different kinds of things?

- 01 Yes
- 02 No

**[CHECK SC7- SC8]**

END OF FILTER

END OF FILTER

END OF FILTER

**LOOP FOR EACH CARE GIVER WHO PROVIDES HELP**

[CaHrs[ploop]=1] (CaHrs is a computed variable)

*IF type of caregiver = formal care providers (ploop in CaHRS [26..35])*

**CAHRF**

Thinking about [^the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] in the last week how many hours have they helped [^you/[^name]] in person with these kinds of tasks?

INTERVIEWER EXPLAIN IF NECESSARY: not include help over the phone or by internet

IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS

ENTER NUMBER OF HOURS. IF LESS THAN 1 HOUR ENTER 0.5.

[^BLANK/INTERVIEWER INSTRUCTION: IF home care worker / Personal Assistant or other care staff "live in" / "sleep in", INCLUDE ALL hours they are on duty.]

IF RESPONDENT DOES NOT GIVE PRECISE ANSWER INTERVIEWER

CODE DK

Press <F9> for help

Do not include occasional errands/odd jobs without the respondent such as picking up glasses or returning library books

**[CHECK SC9]**

END OF FILTER

If CAHRF (hours) not provided for formal provider or provider is informal so CAHRF not asked  
(CAHRS=1-25)

IF number of hours helped by formal provider <> RESPONSE [CaHrF<>RESPONSE]

### CAHRI

SHOW CARD C14

Thinking about [^your/his/her] [^husband/wife/partner/ son/other son/daughter/other daughter/grandchild/other grandchild/sister/other sister/brother/other brother/ other relative/ friend/ other friend/ neighbour/other neighbour/the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] in the last week how many hours have they helped [^you/[^name]] in person with these kinds of tasks?

[^BLANK/Please only think about the hours they were helping [^you/[^name]] with these kinds of tasks and not about the time they were around in the house or there to help [^you/[^name]] if [^you/he/she] needed it.

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet or doing occasional errands or odd jobs without the respondent

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours  
IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS

[^BLANK/INTERVIEWER INSTRUCTION: IF home care worker / Personal Assistant or other care staff "live in"/ "sleep in", INCLUDE ALL hours they are on duty.]

Press <F9> for help

Do not include occasional errands/odd jobs without the respondent such as picking up glasses or returning library books

01 No help in the last week,

02 Less than one hour,

03 1-4 hours,

04 5-9 hours,

05 10-19 hours,

06 20-34 hours,

07 35-49 hours,

08 50-99 hours,

09 100 hours or more

IF number of hours help provided = DK, RF [CaHrl=DK OR CaHrl=RF]

### CAHRG

Can you tell me whether in the last week [^your/his/her] [^husband/wife/partner/ son/other son/daughter/other daughter/grandchild/other grandchild/sister/other sister/brother/other brother/ other relative/ friend/ other friend/ neighbour/other neighbour/the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] helped [^you/[^name]] in person with these tasks for: ...READ OUT...

01 Less than 20 hours,

02 20-34 hours,

03 Or, for 35 hours or more?

END OF FILTER

END OF FILTER

END OF FILTER

*LOOP FOR UP TO TWO CAREGIVERS WHO PROVIDE THE RESPONDENT WITH THE MOST HOURS OF CARE*

*IF top care givers providing the most hours of care = RESPONSE*

*[CAFnd[1] = 1...97 OR CAFnd [2] = 1...97] (CaFnd is a computed variable)*

### **CAHPF**

SHOW CARD C15

Still thinking only about help received in person, how often does [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] usually help [^you/[^name]]?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet

- 01 Every day
- 02 Four to six times a week
- 03 Two or three times a week
- 04 Once a week
- 05 Once a fortnight/ every two weeks
- 06 Once a month
- 07 Less than once a month

*IF provider = the home care worker, home help, personal assistant, the member of the reablement, intermediate care staff team, the voluntary helper, the member of staff at the care/nursing home/ the other helper (formal providers except cleaners, handymen, other helpers AND how often caregiver provides help = every day...two or three times a week*

*(PFndq IN [26..31,34]) AND (CaHpF =1..3]) (PFndq is a computed variable)*

### **CAHPD**

SHOW CARD C16

On the days [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] helps [^you/[^name]], how many times a day does he/she usually help [^you/[^name]]?

IF VARIES FROM DAY TO DAY, ASK RESPONDENT TO ANSWER FOR THE MOST COMMON PATTERN

- 01 once a day
- 02 twice a day
- 03 three or four times a day
- 04 all the time
- 05 whenever I need it?

END OF FILTER

*IF provider is any informal provider or formal provider apart from cleaners, handymen, other helpers [PFndq <> 32,33,35]*

### **CAHPW**

**SHOW CARD C17**

Still thinking about help received in person, when does [^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] help [^you/[^name]]?

INTERVIEWER EXPLAIN IF NECESSARY: Not help over the phone or by internet.

INTERVIEWER EXPLAIN IF NECESSARY: Help with going to bed or getting up is day time help.

01 During the day time only, until [^you/[^name]] [^go/goes] to bed,

02 During the night time only, once [^you/[^name]] [^have/has] gone to bed,

03 Or both during the day time and at night after [^you/[^name]][^have/has] gone to bed?

END OF FILTER

*IF formal providers = yes OR hours of informal care = yes, 20 hours +from an individual provider [CaDPA=1] CaDPA is a computed variable*

**CAPYL\***

Now I am going to ask you a few questions about paying for the care [^you/[^name]] receive(s). Press <1> and <Enter> to continue.

**CAWDA\***

[^Do/Does] [^you/[^name]] usually deal with paying for [^your/his/her] care or does a family member or friend manage this for [^you/[^name]]?

INTERVIEWER CODE RESPONDENT ANSWER:

01 Deals with this all [^your/him/hers]

02 Deals with some of it but not all

03 Does not deal with this at all

*IF payment for care = dealt with to some extent by respondent, not dealt with by respondent [CaWDa =2,3]*

**CAWDB\***

INTERVIEWER: Ask respondent whether the person who deals with payments is currently at home and could assist with this section (if the respondent wishes).

Use discretion to decide whether this is appropriate.

If this person is available, continue with this section addressing questions to respondent and the person they have chosen. If no one is available continue with this section with the respondent alone. Press <1> and <Enter> to continue.

END OF FILTER

**CADP\*****SHOW CARD C18**

Local authorities/council/social services offer different ways of arranging payment for people's care. This card describes some of these ways. Please look at the card and tell me whether either of these apply for the care [^you/[^name]] receive(s)?

INTERVIEWER: Only include payments for social care. Do not include other payments for example, pension or Attendance Allowance.

INTERVIEWER: IF RESPONDENT SELECTS ONLY ONE ANSWER (1 OR 2) PROBE FOR THE OTHER ONE: Does the other one also apply?

CODE ALL THAT APPLY (1 and 2 can be coded together, 3 can only be coded on its own).

01 Direct payments

- 02 Local authority/council/social services manages the money  
 03 Neither of these

**[CHECK SC10]**

**CAPB\***

[^Do/Does] [^you/[^name]] have a **Personal Budget**, sometimes known as an **Individual Budget**? This is when the local authority/ council/social services decides the amount or pot of money necessary to meet social care needs. [^you/he/she] can choose how to spend this money which can be used for a range of services, not just social care.

INTERVIEWER EXPLAIN IF NECESSARY: The money could be paid to [^you/[^name]] as a Direct Payment or the local authority/ council/social services could manage the money for [^you/him/her].

- 01 Yes, have Personal Budget/Individual budget  
 02 No, do not have Personal Budget/ Individual Budget

**CAINA\***

Has the local authority/council made an assessment of what [^you/[^name]] can afford for any of [^your/his/her] care needs?

This is sometimes called an **income assessment or means testing**.

INTERVIEWER EXPLAIN IF NECESSARY: This might have been when the local authority/council was organising care services or arranging a Direct Payment for [^your/his/her] care.

- 01 Yes, had income assessment  
 02 No

END OF FILTER

*LOOP FOR EACH FORMAL PROVIDER , ASKED SEPARATELY FOR HOMECARE WORKERS*

*IF any formal providers= yes (CaIncA=1) CaIncA is a computed variable.*

**CAARR\***

SHOW CARD C19

How was the help from [[^BLANK/your/his/her] ^home care worker/ home help/ personalassistant/ member of the reablement / intermediate care staff team/ voluntary helper/ warden / sheltered housing manager/ cleaner/the council's handyman/the member of staff from thecare/nursing home/other helper]arranged? Please look at this card and tell me which option applies.

- 01 Arranged without involvement from the local authority, council or social services,
- 02 Local authority, council or social services arranged this help,
- 03 Local authority, council or social services told [^you/him/her] about the help but [^you/he/she] arranged it
- 04 [^your/him/hers] or [^your/his/her] family arranged it,
- 05 Other

LOOP UP TO TWO TIMES FOR EACH RESPONDENT (using two of three loops):

*Loop 1 (Route A) =IF Local authority involved in arranging care: who arranged help = council,self [CaaRr = 2,3, CaRa = 1] CARA is a computed variable. Loop 1 asked for one or multiple providers arranged by local authority*

||

|| Loop 2 (Route B) = IF Local Authority not involved in arranging care: who arranged help <> council, self OR || Informal providers provide 20 hrs + of care in the last week [CaAsk = Response]. Loop 2 only asked about individual providers where LA not involved in arranging that care

CAAsk1 indicates which type of provider is referred to in Loop 2 of payment questions:

(1-Husb/Wife/Partner; 2-Son A; 3-Son B; 4-Son C; 5-Daughter A; 6-Daughter B; 7-Daughter C; 8-Grandchild A; 9-Grandchild B; 10-Grandchild C; 11-Sister A; 12-Sister B; 13-Sister C; 14-Brother A; 15-Brother B; 16-Brother C; 17-Other relative A; 18-Other relative B; 19-Other relative C; 20-Friend A; 21-Friend B; 22-Friend C; 23-Neighbour A; 24-Neighbour B; 25-Neighbour C; 26-Home care worker/ home help/ personal assistant A; 27-Home care worker/ home help/ personal assistant B; 28-Home care worker/ home help/ personal assistant C; 29-A member of the reablement / intermediate care staff team; 30-Voluntary helper; 31-Warden / Sheltered housing Manager; 32-Cleaner; 33-Council's handyman; 34-Member of staff at the care/nursing home; 35-Other - please specify.)

|| Loop 3 (Route B) = asked once if Loop 1 not asked AND if there are eligible providers (formal providers not || arranged by local authority or informal providers giving 20+ hours per week)

||(CaAsK[2]=response) and (CaRA<>yes)] Loop 3 only asked about individual providers where LA not involved in arranging that care. Only asked if Loop 1(Route A) not asked.

CaAsk2 indicates which type of provider is referred to in Loop 3 of payment questions. Same categories as CAAsk1.

#### CAPAY\*

[^Do/Does] [^you/[^name]] [^your/his/her partner] pay or give any money for the help given by [^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]? Please include any payments made for this care, even if not made directly to the care provider.

^Do not include gifts, treats or occasional payments of expenses such as petrol money or lunch (informal providers only).

- 01 Yes,
- 02 No,
- 03 Don't know

#### CAPFQ\*

How much money [^do/does] [^you/[^name]] [^your/his/her partner] pay for the help given by [^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]. Please include any payments made for this care, even if not made directly to the care provider?

INTERVIEWER: Record reference period given by respondent. Record amount at next question.

- 01 per hour
- 02 per visit
- 03 per day
- 04 per week
- 05 per fortnight

06 per four weeks  
07 per calendar month  
08 per year

*IF frequency of payment = RESPONSE [CaPFq = RESPONSE]*

**CAPAM**

INTERVIEWER: ENTER AMOUNT IN POUNDS AND PENCE  
: 1.00..999997.00

END OF FILTER

*IF frequency of payment = NONRESPONSE OR payment amount = NONRESPONSE  
[(CaPFq = NONRESPONSE) OR (CaPAm = NONRESPONSE)]*

*IF frequency of payment = per hour [CaPFq = 1]*

**CAPYAB**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£3, £5, £8, £12,)

END OF FILTER

*IF frequency of payment = per visit, per day [CaPFq =2,3]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£5, £10, £20, £30)

END OF FILTER

*IF frequency of payment = per week [CaPFq =4]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£10, £25, £40, £100)

END OF FILTER

*IF frequency of payment = per fortnight [CaPFq =5]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£20, £50, £80, £200)

END OF FILTER

*IF frequency of payment = four weeks, calendar month [CaPFq =6,7]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£40, £100, £150, £400)

END OF FILTER

*IF frequency of payment = per year [CaPFq =8]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£500, £1000, £2000, £5000)

END OF FILTER

*ELSE*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£40, £100, £150, £400)

END OF FILTER

END OF FILTER

**CAPAI\***

You said [^you/[^Name]] pay(s) [^amount] [^per hour/per visit/per day/per week/per fortnight/ per four weeks/per calendar month/ per year] for the care provided by [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]?

Does this payment cover all the cost of this help or some of the cost of this help?

EXPLAIN IF NECESSARY: the payment for [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper].

01 All

02 Some

**CAPHW\***

SHOW CARD C20

How [^do/does] [^you/name] usually pay or give money to [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] for helping [^you/him/her]?

CODE ALL THAT APPLY

[^I/He/She] use(s) money from:

- 01 Own personal income, savings, pension or benefit (such as Attendance Allowance),
- 02 Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services,
- 03 From another source

END OF FILTER

**CAPAD\***

And [^in addition to what] [^you/[name]] pay(s)), as far as you are aware does anyone else or any organisation pay or give money to [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] for the care [^you/he/she] receive(s) – for example the council or a family member? Do not count any benefits such as Carers Allowance or Attendance Allowance.

**INTERVIEWER CODE:**

- 01 Yes, the local authority /council /social services,
- 02 Yes, a family member (with their own money),
- 03 Yes, other,
- 04 No, nobody else pays

**[CHECK SC11]**

*IF other payment source = Yes, local authority/council/social services [CaPAd = 1]*

**CALAP\***

And does the local authority, council or social services pay [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] directly or is it through a Direct Payment or a Personal Budget?

**CODE ALL THAT APPLY:**

- 01 Local authority / social services or council pay directly,
- 02 Paid through Direct Payments / Personal or Individual Budgets

END OF FILTER

*IF way usually pay = direct payment OR type of payment = paid through direct payments [(CaPHw= 2) OR (CaLAP =2)]*

**CALAF\***

How much money is [[^BLANK/your/his/her/] husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]paid from the direct payment or personal budget for helping [^you/[name]]?

INTERVIEWER: Enter reference period for payment on this screen. Enter amount in pounds and pence on next screen.

- 01 Per hour,
- 02 Per visit,
- 03 Per day,
- 04 Per week,
- 05 Per fortnight,
- 06 Per four weeks,
- 07 Per calendar month,
- 08 Per year

*IF (CaLAF = RESPONSE) THEN*

**CALAM\***

INTERVIEWER: ENTER AMOUNT IN POUNDS AND PENCE  
1.00..9999997.00

END OF FILTER

*IF frequency of payment = NONRESPONSE OR payment amount = NONRESPONSE  
[(CaLAF = NONRESPONSE) OR (CaLAM = NONRESPONSE)]*

*IF frequency of payment = per hour (CaLAF = 1)*

**CALAAB**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£3, £5, £8, £12)

END OF FILTER

*IF frequency of payment = per visit, per day [CaLAF =2,3]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£5, £10, £20, £30)

END OF FILTER

*IF frequency of payment = per week [CaLAF =4]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£10, £25, £40, £100)

END OF FILTER

*IF frequency of payment = per fortnight [CaLAF =5]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£20, £50, £80, £200)

END OF FILTER

*IF frequency of payment = four weeks, calendar month [CaLAF =6,7]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£40, £100, £150, £400)

END OF FILTER

*IF frequency of payment = per year [CaLAF =8]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£500, £1000, £2000, £5000)

END OF FILTER

*ELSE*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£40, £100, £150, £400)

END OF FILTER

END OF FILTER

END OF FILTER

*IF payment for care = no OR other payment for care = no [(CaPay=2) AND (CaPAd=2)]*

### **CANOP**

You have told me that no payment was made for [[^BLANK/your/his/her/]  
husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/  
brother/other brother / other /friend/ other friend/neighbour/other neighbour/ the home care  
worker/ home help/ personal assistant/ the member of the reablement / intermediate care  
staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the  
council's handyman/the member of staff at the care/nursing home/ the other helper] helping  
[^you/[name]]. Why was this?

UNPROMPTED RESPONSE:

- 01 They provided their help for free/ there is no charge for the service,
- 02 Sometimes give them money or gifts for the help they give,
- 03 Other

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

*IF formal providers = yes OR hours of informal care = yes, 20 hours +  
[CaDPA=1] CaDPA is a computed variable*

### **CAWHO**

INTERVIEWER: WHO ANSWERED THE QUESTIONS IN THIS SECTION?

- 01 Respondent only,
- 02 Respondent with assistance of another person,
- 03 Another person with limited input from respondent,
- 04 Another person with no input from respondent.

### **CACM**

INTERVIEWER: Do you have any comments about this section?

- 01 Yes
- 02 No

*IF comments about section = yes [CaCm=1]*

**CACMX**

| INTERVIEWER: PLEASE ENTER COMMENTS HERE  
| STRING[200]

END OF FILTER

END OF FILTER

## **HEHPA to HELC removed**

HeCAT2  
"Time before CAHPS"  
: TIMETYPE

### **CAHPS**

SHOW CARD C21

[^Have/Has] [^you/name] used any of the services listed on this card in the last three months?  
CODE ALL THAT APPLY.

- 01 Occupational therapist or physiotherapist
- 02 Chiropodist or podiatrist
- 03 Exercise classes including yoga, pilates, gym
- 95 Other
- 96 None of these

*IF used services = other [CAHPS = 95]*

### **CAHPSO**

INTERVIEWER: Please specify other answer.

STRING[80]

END OF FILTER

### **CAHPSZ**

"@/~/EDITOR : Back code here. Code frame 7.  
@/^CHaveHas[pnum] ^youname[PNum] used any of the services  
listed on this card in the last three months?  
@/~/CODE ALL THAT APPLY."  
: SET [4] OF  
(OccTher "Occupational therapist or physiotherapist",  
Chiropodist "chiropodist or podiatrist",  
Exer "Exercise classes including yoga, pilates, gym",  
E4 (4) "Osteopath",  
E5 (5) "Chiropractor",  
E6 (6) "Massage",  
E7 (7) "Acupuncture",  
E8 (8) "Other alternative therapies e.g. reflexology, aromatherapy, homeopathy",  
E9 (9) "Hydrotherapy",  
{EDIT:  
ONCode (85) "Other answer - not codeable 01-09",  
Irrel (86) "Irrelevant response - not codeable 01-09",}  
Other (95),  
None (96) "None of these"), NODK, NORF, EMPTY

### **CAHPSM**

"@/~/MERGED VARIABLE INCLUDING BACKCODING. Code frame 7.  
@/^CHaveHas[pnum] ^youname[PNum] used any of the services  
listed on this card in the last three months?  
@/~/CODE ALL THAT APPLY."  
: SET [4] OF  
(OccTher "Occupational therapist or physiotherapist",  
Chiropodist "chiropodist or podiatrist",  
Exer "Exercise classes including yoga, pilates, gym",

- E4 (4) "Osteopath",
- E5 (5) "Chiropractor",
- E6 (6) "Massage",
- E7 (7) "Acupuncture",
- E8 (8) "Other alternative therapies e.g. reflexology, aromatherapy, homeopathy",
- E9 (9) "Hydrotherapy",
- ONCode (85) "Other answer - not codeable 01-13",
- Irrel (86) "Irrelevant response - not codeable 01-13",
- None (96) "None of these")

*IF age of respondent >= 65 [AgeP >= 65]*

### **CACLUB**

In the last month [<sup>^</sup>have/has] [<sup>^</sup>you/name]... READ OUT ...

CODE ALL THAT APPLY.

- 01 Attended a lunch club
- 02 Attended a day care centre
- 03 Had meals on wheels
- 04 Had private frozen meals from a provider such as Wiltshire farm foods
- 05 Had family, friend or neighbour bring [<sup>^</sup>you/him/her] ready prepared meals
- 96 None of these

*IF care provided = lunch club [CaClub = 1]*

### **CALC**

SHOW CARD C22

How often [<sup>^</sup>do/does] [<sup>^</sup>you/] attend a lunch club?

- 01 Every day or nearly every day
- 02 Two or three times a week
- 03 Once a week
- 04 Two or three times a month
- 05 Once a month or less

END OF FILTER

*IF care provided = day care centre [CaClub = 2]*

### **CADCC**

SHOW CARD C22

How often [<sup>^</sup>do/does] [<sup>^</sup>you/name] attend a day care centre?

- 01 Every day or nearly every day
- 02 Two or three times a week
- 03 Once a week
- 04 Two or three times a month
- 05 Once a month or less

*IF frequency attend day care centre = every day or nearly every day [CaDCC = 1]*

### **CACD**

Each time that [<sup>^</sup>you/name] [<sup>^</sup>have/has] attended the day centre, including attending classes or groups run by the day centre in the last month about how many hours did [<sup>^</sup>you/he/she] usually spend there? Was it...READ OUT...

- 01 1-3 hours
- 02 4-6 hours, or
- 03 more than 6 hours

END OF FILTER

END OF FILTER

*IF care provided = meals on wheels [CaClub = 3]*

**CAMW**

SHOW CARD C22

How often [^do/does] [^you/name] eat a meal provided by Meals on Wheels?

- 01 Every day or nearly every day
- 02 Two or three times a week
- 03 Once a week
- 04 Two or three times a month
- 05 Once a month or less

END OF FILTER

**[CHECK HE61]**

END OF FILTER

**CAHMN**

In the last three months, [^have/has] [^you/name] used or received the Local Authority/council's Handy man's service?

This is usually a free service sometimes arranged through Age Concern or Help the Aged.

- 01 Yes
- 02 No

END OF FILTER

**HEAID@\***

SHOW CARD C23

[^Do you / Does [^name]] use any of these?

Only include personal alarms used to call for assistance after falls etc.

- 01 A cane or walking stick
- 02 A zimmer frame or walker
- 03 A manual wheelchair
- 04 An electric wheelchair
- 05 A buggy or scooter
- 06 Special eating utensils
- 07 A personal alarm
- 08 Elbow crutches
- 96 None of these

*[Multiple responses to HEAID are recoded in variables HEAIDCA HEAIDZI HEAIDMW HEAIDEW HEAIDBU HEAIDEA HEAIDAL HEAIDCR HEAID96]*

*[code maximum 8 out of 9 possible responses]*

**[CHECK HE62]**

*IF use of aids = RESPONSE AND NOT use of aids = None  
[HEAid = RESPONSE) AND NOT (HEAid=96]*

*IF date of last interview = RESPONSE [PrevDate = RESPONSE]*

*IF use of aids > 1 AND NOT refreshment sample indicator = yes  
[(HeAid.CARDINAL>1) AND NOT(HFFW.Refresh = 1)]*

#### **HEA1CH**

You mentioned that [^you/name] [^have/has] the aids listed below:  
[^ cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches >].

Can I check, did [^you/he/she] get any of these aids since [^<date of last interview>]?

INTERVIEWER: Please include any replacements.

01 Yes

02 No

END OF FILTER

END OF FILTER

#### *LOOP FOR EACH NEW AID*

*IF any aids new since last interview <> no [HeA1ch <> No]*

*IF date of last interview = RESPONSE AND NOT refreshment sample indicator = yes  
[(PrevDate=RESPONSE) AND (NOT(HFFW.Refresh = 1))]*

#### **HEA2CH**

Can I check, did [^you/name] get ^[^this/these] [^cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches] since [^<date of last interview>]

INTERVIEWER: Please include any replacements.

01 Yes

02 No

END OF FILTER

*LOOP IF existing sample and got an aid since last interview or reported an aid for first time as refreshment sample or new partner:*

*If which aids new since last interview = yes OR refreshment sample indicator = yes OR  
((NOT( date of last interview = RESPONSE)) AND ((NOT(refreshment sample indicator = yes)))  
[(HeA2ch = 1) OR (HFFW.Refresh = 1) OR ((NOT(PrevDate = RESPONSE)) AND  
(NOT(HFFW.Refresh = 1)))] LOOP for each aid mentioned at HEAID (for refreshment or new partner  
or HEA2Ch for existing)*

#### **HEAIDP@**

Who paid for the [^cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches]?

INTERVIEWER: Read out each in turn and code all that apply.

1 Health Service (NHS)

2 Social Services

3 ^[You / Name] or [ your / his / her spouse/partner]

95 or someone else (please specify)?

*[Multiple responses to HEAIDP are recoded in variables HECANHS HECASS HECASE HECAOT HEZINHS HEZISE HEZIOT HEMWNHS HEMWSS HMEWSE HEMWOT HEEWNHS HEEWSS HEEWSE HEEWOT HEBUNHS HEBUSS HEBUSE HEBUOT HEEANHS HEEASS HEEASE HEEAOT HEALNHS HEALSS HEALSE HEALOT HECRSS HECRSE HECROT]*

*IF who paid for aid = other [HeAidp = 95]*

**HEAIDPO@**

Please specify.

STRING[50]

*[Open responses to HEAIDPO are coded and merged with the multiple responses to HEAIDP (recoded as above). These merged responses are recoded in variables: HECAMNS HECAMSS HECAMSE HECAMFF HECAMLL HECAMCH HECAMFR HECAM85 HECAM86 HEZIMNHS HEZIMSS HEZIMSE HEZIMFA HEZIMLL HEZIMCH HEZIMFR HEZIM85 HEZIM86 HEMWMNHS HEMWMSS HEMWMSE HEMWMFA HEMWMLL HEMWMCH HEMWMFR HEMWM85 HEMWM86 HEEWMNHS HEEWMSS HEEWMSE HEEWMFA HEEWMLL HEEWMCH HEEWMFR HEEWM85 HEEWM86 HEBUNHS HEBUMSS HEBUMSE HEBUMFA HEBUMLL HEBUMCH HEBUMFR HEBUM85 HEBUM86 HEALNHS HEALMSS HEALMSE HEALMFA HEALMLL HEALMCH HEALMFR HEALM85 HEALM86 HECRNHS HECRMSS HECRMSE HECRMFA HECRMLL HECRMCH HECRMFR HECRM85 HECRM86]*

END OF FILTER

*If only mentioned one answer at HEAidP [HeAidp=1 answer only]*

**HEAP2 @**

Can I just check that ^[the NHS/Social Services/ you/ your spouse or partner] covered all the costs of the [^cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches]?

- 01 Yes covered all costs
- 02 No

END OF FILTER

**[CHECK HE63]**

END OF FILTER

END OF FILTER

END OF FILTER

**HEINCT**

We would like to ask you about incontinence.

During the last 12 months, have you lost any amount of urine beyond your control?

- 1 Yes
- 2 No

*IF whether lost urine beyond control = yes [HeInct = 1]*

**HEINCTA**

When you had this problem, did it last for more than 1 month?

- 1 Yes
- 2 No

END OF FILTER

### **HEBOW**

During the last 12 months, have you had any problems controlling your bowels.

By problems controlling your bowels we mean that this could result in accidentally having soiled pants, leakage from the bowel, needing to go to the toilet frequently or urgently, sometimes not making it to the toilet in time, or using aids or appliances to manage bowel problems or incontinence. Please include problems with your bowel caused by any medicines that you take?

01 Yes

02 No

*IF had a problem controlling bowels in last 12 months = yes [HeBow = 1]*

### **HEBOWA**

*When you had this problem, did it last for more than 1 month?*

01 Yes

02 No

*IF whether ever smoked cigarettes at Last interview <> yes [HeSmk (Last int) <> 1] or if proxy*

### **HESMK\***

[Have you/ Has [^name]] ever smoked cigarettes?

1 Yes

2 No

END OF FILTER

*IF (whether ever smoked cigarettes = yes) OR (whether ever smoked cigarettes at Last interview <> yes)  
[(HeSmk = 1) OR (HeSmk (Last int) <> 1)]*

### **HESKA\***

[^Do you / Does [^name]] smoke cigarettes at all nowadays?

1 Yes

2 No

END OF FILTER

*IF (whether smoked cigarettes at Last interview = yes) AND (whether smokes cigarettes now = no)  
[(HESka (Last int) = 1) AND (HESka = 2)]*

### **HESKD**

The last time we interviewed you [^on date of last interview], you said that you were smoking at that time.

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

1 Yes

2 No

*IF whether smoking at last interview disputed = no [HeSkd = 2]*

### **HESKE**

INTERVIEWER: Code reason why respondent disputes the record. Respondent says...

- 1 Never smoked cigarettes
- 2 No longer smoking cigarettes by last interview
- 3 Stopped smoking cigarettes since last interview

*ELSE IF whether smoking at last interview disputed = yes [HeSkd = 1]*

#### **HESKF**

INTERVIEWER: Code response given by respondent

- 1 Does smoke cigarettes nowadays
- 2 Stopped smoking cigarettes since last interview

END OF FILTER

*IF (reason smoking disputed = stopped smoking ) OR (whether smokes now = stopped smoking) [HeSke = 3 OR HeSkf = 2]*

#### **HESTOP**

SHOW CARD C24

What was the main reason that you stopped smoking cigarettes?

- 01 Doctor or nurse said I should stop
- 02 It is unhealthy
- 03 It is expensive / to save money
- 04 Pressure from family or friends
- 05 Worried about effect of passive smoke on people around me
- 06 Stopped enjoying it
- 07 Cosmetic reasons (e.g. smell, stained teeth, fingers, hair)
- 08 It's becoming harder to smoke in public or at work
- 09 Advertising
- 95 Other (SPECIFY)

*IF reason for quitting smoking = other [Hestop = 95]*

#### **HESTOPA@**

INTERVIEWER: Enter other reason given for stopping smoking.

String 30

END OF FILTER

END OF FILTER

END OF FILTER

*IF whether smokes cigarettes nowadays = yes OR whether smokes now = does smoke cigarettes [(HESka = 1) OR (HESkf = 1)]*

#### **HECIG**

Do you smoke cigarettes or roll ups?

- 1 Cigarettes
- 2 Roll ups
- 3 Both cigarettes and roll-ups

*IF whether smokes cigarettes or roll ups = cigarettes, both [HECig = 1, 3]*

#### **HESKB**

About how many cigarettes a day do you usually smoke on weekdays?  
INTERVIEWER: If range given and can't estimate, enter mid-point.  
If less than one a day, enter 0.  
Range: 0..997

**HESKC**

About how many cigarettes a day do you usually smoke at weekends?  
INTERVIEWER: If range given and can't estimate, enter mid-point.  
If less than one a day, enter 0.  
Range: 0..997

**[CHECK HE64 - HE67]**

END OF FILTER

*IF whether smokes cigarettes or roll ups = roll ups, both [HECig = 2, 3]*

**HETBA**

How much tobacco do you normally smoke on a weekday?  
INTERVIEWER: Code how answer is given.  
1 Grams  
2 Ounces

**HETBB**

(How much tobacco do you normally smoke on a weekday?)  
INTERVIEWER: Enter amount.  
Range: 0..997

**[CHECK HE68 - HE70]**

**HETBC**

How much tobacco do you normally smoke a day at weekends?  
INTERVIEWER: Code how answer is given.  
1 Grams  
2 Ounces

**HETBD**

(How much tobacco do you normally smoke a day at weekends?)  
INTERVIEWER: Enter amount.  
Range: 0..997

**[CHECK HE71 - HE73]**

END OF FILTER

**HECGSTP**

Has a doctor or nurse ever advised you to stop smoking?  
1 Yes  
2 No

*IF whether doctor / nurse advised to stop smoking = yes [Hecgstp = 1]*

**HECGSTA**

Did you stop for more than 6 months as a result of this advice?

- | 1 Yes  
| 2 No

END OF FILTER

**HECGNIC**

Has any doctor or nurse ever told you about any nicotine products, such as nicotine patches, chewing gum, lozenges or other similar products at all to help you give up smoking?

- 1 Yes  
2 No

**HENICTK**

[^Are you / Is [^name]] taking any medication to help [^you / him / her] stop smoking, such as nicotine replacement medication or gum or patches?

- 1 Yes  
2 No

END OF FILTER

**HEALA**

In the past 12 months have you taken an alcoholic drink...

INTERVIEWER: Read out...

- 1...twice a day or more  
2...daily or almost daily  
3...once or twice a week  
4...once or twice a month  
5...special occasions only  
6...or, not at all?

**HEACTA**

SHOW CARD C25

We would like to know the type and amount of physical activity involved in ^[your / name's] daily life.

^[Do you / Does he or she] take part in sports or activities that are vigorous...

INTERVIEWER: Read out...

- 1 ...more than once a week,  
2 once a week,  
3 one to three times a month,  
4 hardly ever, or never?

**HEACTB**

SHOW CARD C25

And ^[do you / does he or she] take part in sports or activities that are moderately energetic...

INTERVIEWER: Read out...

- 1 ..more than once a week,  
2 once a week,  
3 one to three times a month,  
4 hardly ever, or never?

**HEACTC**

SHOW CARD C25

And ^[do you / does he or she] take part in sports or activities that are mildly energetic...

INTERVIEWER: Read out...

- 1 ..more than once a week,  
2 once a week,

3 one to three times a month,  
4 hardly ever, or never?

## **Female Health Module**

*IF age started menstruation at last interview <> RESPONSE OR operation to remove uterus or womb at last interview = no OR operation to remove uterus or womb at last interview <> RESPONSE OR operation to remove ovaries at last interview = no OR operation to remove ovaries at last interview <> RESPONSE OR had period within last 12 months = yes OR had period within last 12 months = EMPTY OR reason period stopped = pregnancy  
[(Hemen (Last int) <> RESPONSE) OR (Hehye (Last int) = No) OR (Hehye (Last int) <> RESPONSE)  
OR (Heove (Last int) = No) OR (HeOve (Last int) <> RESPONSE) OR (HEpee (Last int) = Yes) OR  
(HEpee (Last int) = EMPTY) OR (Heper (Last int) = 4)]*

### **HEMIN**

The next set of questions are just for women and ask about menstrual periods and issues to do with reproductive organs.

INTERVIEWER: Press <1> and <Enter> to continue.

*IF age started menstruation at last interview <> RESPONSE  
[Hemen (Last int) <> RESPONSE]*

### **HEMEN@**

About how old were you when you had your first menstrual period?

INTERVIEWER: If cannot give exact age, code 95 and ask age band at the next question.  
Range 0..95

**[CHECK HE74-75]**

*IF age started menstruation = unsure (HEMEN = 95)*

### **HEMEB@**

Were you...

- 1 ...less than 11 years old,
- 2 between 11 and 12 years old,
- 3 between 13 and 15 years old,
- 4 between 16 and 18 years old,
- 5 or more than 18 years old?

END OF FILTER

END OF FILTER

*IF uterus or womb removed at last interview= no, NONRESPONSE  
[(Hehye (Last int) = 2) OR (Hehye (Last int) <> RESPONSE)]*

### **HEHYE@**

Have you had an operation for the removal of your uterus or womb?

- 1 Yes
- 2 No

*IF operation to remove uterus or womb = yes [HEHYE = 1]*

### **HEHYY@**

When was this operation for the removal of your uterus or womb?

INTERVIEWER: Enter year.

Range : 1900..9997

*IF year of operation = DK [HEHYY = DK]*

**HEHYYA@**

(If you cannot remember the year) please give your age when you had your uterus or womb removed.

INTERVIEWER: Enter age.

Range 0..150

END OF FILTER

END OF FILTER

END OF FILTER

*IF oophorectomy at last interview = no or not answered*

*(Heove (Last int)= 2) OR (Heove (Last int) <> RESPONSE)*

**HEOVE@**

Have you had an operation to remove both your ovaries (a bilateral oophorectomy)?

1 Yes

2 No

*IF oophorectomy = yes [HEOVE = 1]*

**HEOVY@**

When was this operation for the removal of your ovaries?

Range: 1900..9997

*IF oophorectomy year = DK [HEOVY = DK]*

**HEOVYA@**

(If you cannot remember the year) please give your age when you had your ovaries removed.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

END OF FILTER

END OF FILTER

*IF (past year menstruation at last interview = yes or EMPTY) or (periods stopped reason at last interview = pregnancy or other reason)*

*[(HEpee (Last int) = 1) OR (HEpee(Last int) = EMPTY) OR (Heper (Last int) =4,5)]*

**HEPEE@**

In the past 12 months have you had a period or menstrual bleeding?

1 Yes

2 No

**[CHECK HE76]**

*IF past year menstruation = no [HEPEE = 2]*

**HEPEY@**

In what year did you have your last period?

Range : 1900..2011

**[CHECK HE77]**

*IF year of last period = DK [HEPEY = DK]*

**HEPEA@**

(If you cannot remember the year) please give your age when you had your last period.

INTERVIEWER: Enter age.

Range : 1900..2011

**[CHECK HE78-79]**

END OF FILTER

**HEPER@**

Were your periods stopped by...

- 1 ...the menopause (or no obvious reason),
- 2 surgery (incl, sterilisation/hysterectomy)
- 3 chemotherapy,
- 4 pregnancy or breast feeding,
- 5 or for another reason?

*IF reason for periods stopping = other [HEPER = 5]*

**HEPRB@**

INTERVIEWER: specify other reason periods stopped.

STRING [50]

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF ever taken HRT at last interview = no, not answered*

*[Hehrt (Last int) <> RESPONSE OR OR (Hehrt (Last int) =2]*

**HEHRT@**

This section is about hormone replacement therapy (HRT).

Have you ever taken HRT?

1 Yes

2 No

*IF ever taken HRT = yes [HEHRT = 1]*

**HEHFT@**

When did you first start HRT (hormone replacement therapy)?

INTERVIEWER: Enter year.

Range : 1900..2011

**HEHFM@**

In what month did you first start HRT (hormone replacement therapy)?

**[CHECK HE80-81]**

*IF year of starting HRT = DK [HeHFY = DK]*

**HEHFA@**

(If you cannot remember the year) please give your age when you first started HRT.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

**HEHPS@**

When you first started HRT had your periods stopped?

- 1 Yes
- 2 No

*IF periods stopped before started HRT = yes [HEHPS = 1]*

**HEHPY@**

How long after your last period did you start HRT?

- 1 Less than 3 months
- 2 3-6 months
- 3 7-12 months
- 4 More than 12 months

END OF FILTER

END OF FILTER

END OF FILTER

*IF currently on HRT at last interview = yes [Hehno (Last int) =1]*

**HEHNIN@**

I now have some questions about Hormone Replacement Therapy.

INTERVIEWER: Press <1> and <Enter> to continue.

END OF FILTER

*IF currently on HRT at last interview = yes OR ever taken HRT = yes  
[(Hehno (Last int) = 1) OR (HEHRT = 1)]*

**HEHNO@**

Are you currently on HRT?

- 1 Yes
- 2 No

*IF currently on HRT = no [HEHNO = 2]*

**HEHST@**

When did you last take HRT?

INTERVIEWER: Enter year.

Range : 1900..2050

**[CHECK HE82]**

*IF when last took HRT = DK [HEHST = DK]*

**HEHSTA@**

(If you cannot remember the year) please give your age when you last took HRT.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

END OF FILTER

END OF FILTER

**HEGPOFT\***

During the four weeks ending yesterday, did [^you/[^name]] talk to a family doctor (GP) about [^your/his/her] own health either in person or by telephone?

01 Yes

02 No

*IF family doctor = yes [HeGPOft = 1]*

**HEGPNHS\***

Thinking of the last time [^you/[^name]] talked to a doctor, was this consultation ...

INTERVIEWER: Read out ...

01 ...Under the National Health Service,

02 Or, paid for privately?

END OF FILTER

**HETSET\*@**

INTERVIEWER: The Health section is finished.

Please enter <1> here to make the program store the current time and date.

## **HE Module Checks**

### **HE1-6 SPARE**

**HE7 HEOPT**  
**HE8 HEOPT**  
**HE9 HEOPT**

*IF Types of eye condition = RESPONSE [HeOpt = RESPONSE]*

LOOP FOR idx:= 1 TO 4  
  
IF (HeOpen[idx] = HasNow)  
  
CHECK (idx IN HeOpt) INVOLVING(HeOpt)  
  
INTERVIEWER: The respondent has confirmed that they have ^ConDisp[idx] at a previous question (HeOpen). Please press <Enter> and add code ^idx at this question.  
  
END CHECK  
  
IF types of eye conditions = idx [HeOpt = idx]  
  
CHECK (ConDisp[idx] <> "") INVOLVING(HeOpt)  
  
INTERVIEWER: You cannot use this code.  
  
END CHECK  
  
END OF FILTER  
  
END OF FILTER

*IF Types of eye condition = None [HEOpt= 96]*

CHECK: (CARDINAL(HEopt) = 1)  
  
INTERVIEWER: 'None' is an exclusive code at this question. Please change.  
  
END CHECK  
  
END OF FILTER

**HE10 HESLPE**  
**HE11 HESLPE**

*IF (HESLPE = RESPONSE)*

CHECK: (HESLPE >= 4)  
  
INTERVIEWER: Are you sure the respondent only gets ^heslpe hours sleep a night?

END CHECK

CHECK: (HESLPE <= 10)

INTERVIEWER: Are you sure the respondent gets ^heslpe hours sleep a night?

END CHECK

END OF FILTER

**HE12 HEDIAA**

**HE13 HEDIAA**

*IF types of CVD conditions = None [HeDiaa = None]*

CHECK: *types of CVD conditions.CARDINAL = 1 [HeDiaa.CARDINAL = 1 ]*

INTERVIEWER: 'None' is an exclusive code at this question.  
Please change!

END CHECK

END OF FILTER

LOOP FOR Idx:= 1 TO 8

*IF Reason CVD condition disputed = Did not have previously, but has now [HeDiaN = 3]*

CHECK: (Idx = *types of CVD conditions*) INVOLVING (*types of CVD conditions*)  
[Idx = HeDiaa INVOLVING HeDiaa ]

INTERVIEWER: The respondent has confirmed they have ^XCon[idx] at a  
previous question (reason CVD condition disputed).  
Please add code ^idx to this question.

END CHECK

END OF FILTER

END OF FILTER

## **HE14 HEDIX**

*IF types of CVD conditions = None [HeDiaZ = 96]*

*CHECK: types of CVD conditions.CARDINAL = 1 [HeDiaZ.CARDINAL = 1 ]*

*EDITOR: 'None' is an exclusive code at this question.  
Please change!*

**END CHECK**

**END OF FILTER**

## **HE15 HEAGA**

## **HE16 HEAGA**

*IF (Respondent Age > 0) AND (Age first told had angina = RESPONSE)  
[IAgeOf > 0 AND HeAga = RESPONSE]*

*CHECK: age first told had angina <= Respondent Age [HeAga <= IAgeOf ]*

*INTERVIEWER: ^IName[Pnum] is only ^ageoff[Pnum] now!*

*Please check and amend.*

**END CHECK**

**END OF FILTER**

*IF age first told had angina = RESPONSE [HeAga = RESPONSE]*

*CHECK: age first told had angina > 35 [HeAga > 35 ]*

*This seems young (^heaga), can I check?*

**END CHECK**

**END OF FILTER**

## **HE17 HEAGARY**

## **HE18 HEAGARY**

*IF (HeAgaRY = RESPONSE)*

*CHECK: (HeAgaRY <= S1Intdat.YEAR)*

*INTERVIEWER: This date is in the future (^HeagaRY)! Please change!*

**END CHECK**

**END OF FILTER**

"

*IF (Date of Last Interview = RESPONSE) AND (Month told had angina = RESPONSE) AND (Year told had angina = RESPONSE) AND (Refreshment sample indicator <> Yes)  
[(PrevDate[PNum] = RESPONSE) AND (HeagaR = RESPONSE) AND (HeagaRY = RESPONSE) AND  
NOT(HFFW.Refresh = 1)]*

**CHECK:** (PrevDate[PNum] <= TODATE(HeagaRY,ORD(HeagaR),28))

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check! If correct, add Note explaining why the condition was not reported last time.

END CHECK

END OF FILTER

**HE19 HEAGB**

**HE20 HEAGB**

*IF (Respondent Age > 0) AND (Age first told had heart attack = RESPONSE)  
[IAgeOf > 0 AND HeAgb =RESPONSE]*

**CHECK:** age first told had heart attack <= Respondent Age [HeAgb <= IAgeOf ]

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!

Please check and amend.

END CHECK

END OF FILTER

*IF age first told had heart attack = RESPONSE [HeAgb = RESPONSE]*

**CHECK:** age first told had heart attack > 35 [HeAgb > 35 ]

This seems young (^heagb), can I check?

END CHECK

END OF FILTER

**HE21 HEAGBRY**

**HE22 HEAGBRY**

*IF ((Interview Date = RESPONSE) AND (Month told had heart attack = RESPONSE)) AND  
(Year told had heart attack = RESPONSE)  
[(SIIIntDat = RESPONSE) AND (HeAgbR= RESPONSE) AND (HeAgbRY= RESPONSE)]*

**CHECK:** SIIIntDat >= (HeAgbRY,ORD(HeAgbR),1))

INTERVIEWER: This date is in the future (^HeAgbR ^HeAgbRY)! Please

```

    | change!
    |
    | END CHECK
    |
    | END OF FILTER

    IF ((Previous Interview Date= RESPONSE) AND (Month told had heart attack = RESPONSE)) AND
    (Year told had heart attack = RESPONSE) AND refreshment sample indicator <> Yes [PrevDate =
    RESPONSE AND HeAgbR = RESPONSE AND HeAgbRY = RESPONSE AND NOT(HFFW.Refresh =
    1)]

    CHECK: Previous Interview Date <= TODATE (year told had heart attack, month told had heart attack)
    [PrevDate <= TODATE HeAgbRY, HeAgbR.ORD, 28]

    INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please
    check!

    END CHECK

    END OF FILTER

HE23 HEAGC
HE24 HEAGC

    IF (Respondent Age Age > 0) AND (age first told had congestive heart failure = RESPONSE)
    [IAgeOf > 0 AND HeAgc = RESPONSE]

    CHECK: age first told had congestive heart failure <= Respondent Age [HeAgc <= IAgeOf ]

    INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!
    Please change!

    END CHECK

    END OF FILTER

    IF age first told had congestive heart failure = RESPONSE [HeAgc = RESPONSE]

    CHECK: age first told had congestive heart failure > 35 [HeAgc > 35 ]

    This seems young (^heagc), can I check?

    END CHECK

    END OF FILTER

HE25 HEAGCRY
HE26 HEAGCRY

    IF (Interview Date = RESPONSE) AND (month told had congestive heart failure = RESPONSE)
    AND (year told had congestive heart failure = RESPONSE) [SIntDat = RESPONSE AND
    HeAgcR = RESPONSE AND HeAgcRY = RESPONSE]

    CHECK: Interview Date >= TODATE (year told had congestive heart failure, month told had congestive
    heart failure.ORD, 1) [QInit.IntDat >= TODATE HeAgcRY, HeAgcR.ORD, 1 ]

```

INTERVIEWER: This date is in the future (^HEAgcR ^HEAgcRY)! Please change!  
 END CHECK  
 END OF FILTER

*IF (Previous Interview Date = RESPONSE) AND (month told had congestive heart failure = RESPONSE) AND (year told had congestive heart failure = RESPONSE) AND NOT refreshemtn sample = yes*  
*[PrevDate = RESPONSE AND HeAgcR = RESPONSE AND HeAgcRY = RESPONSE AND NOT(HFFW.Refresh = 1)]*

CHECK: Previous Interview Date <= TODATE (year told had congestive heart failure, month told had congestive heart failure, 28) [PrevDate <= TODATE HeAgcRY, HeAgcR.ORD, 28 ]

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!  
 END CHECK  
 END OF FILTER

**HE27 HEAGD**

*IF (Respondent Age > 0) AND (age first told had diabetes = RESPONSE)*  
*[IAgeOf > 0 AND HeAgd = RESPONSE]*

CHECK: age first told had diabetes <= Respondent Age [HeAgd <= IAgeOf ]

INTERVIEWER: ^IName[Pnum] is only ^iageof[Pnum] now!  
 Please change!

END CHECK  
 END OF FILTER

**HE28 HEAGDRY**

**HE29 HEAGDRY**

*IF ((Interview Date = RESPONSE) AND (month told had diabetes = RESPONSE)) AND (year told had diabetes = RESPONSE) [QInit.IntDat = RESPONSE AND HeAgdR = RESPONSE AND HeAgdRY = RESPONSE]*

CHECK: Interview Date >= TODATE (year told had diabetes, month told had diabetes.ORD, 1)  
*[SIntDat >= TODATE HeAgdRY, HeAgdR.ORD, 1]*

INTERVIEWER: This date is in the future (^HEAgcR ^HEAgcRY)! Please change!  
 END CHECK  
 END OF FILTER

*IF ((Previous Interview Date = RESPONSE) AND (Month told had diabetes = RESPONSE)) AND (Year told had diabetes = RESPONSE) AND refreshment sample indicator <> yes  
[PrevDate = RESPONSE AND HeAgdR = RESPONSE AND HeAgdRY = RESPONSE AND  
NOT(HFFW.Refresh = 1)]*

CHECK: Previous Interview Date <= TODATE  
(year told had diabetes, month told had diabetes.ORD, 28)  
[PrevDate <= TODATE HeAgdRY, HeAgdR.ORD, 28 ]

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!

END CHECK

END OF FILTER

### **HE30 SPARE**

**HE31 HEAGE**

**HE32 HEAGE**

*IF (Respondent Age > 0) AND (Age first told had stroke = RESPONSE)  
[IAgeOf > 0 AND HeAge = RESPONSE]*

CHECK: age first told had a stroke <= Respondent Age [HeAge <= IAgeOf ]

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!  
Please change!

END CHECK

END OF FILTER

*IF age first told had a stroke = RESPONSE [HeAge = RESPONSE]*

CHECK: age first told had a stroke > 35 [HeAge > 35 ]

This seems young (^heage), can I check?

END CHECK

END OF FILTER

### **HE33 HEAGERY**

**HE34 HEAGERY**

*IF ((Interview Date= RESPONSE) AND (Month told had stroke = RESPONSE)) AND (Year told had stroke = RESPONSE)  
[SIntDat = RESPONSE AND HeAgeR = RESPONSE AND HeAgeRY = RESPONSE]*

CHECK: Interview Date >= TODATE (HeAgeRY, HeAgeR.ORD, 1)  
[SIntDat >= TODATE HeAgeRY, HeAgeR.ORD, 1 ]

```

    || INTERVIEWER: This date is in the future (^HeAgeR ^HeAgeRY)! Please change!
    || END CHECK
END OF FILTER

IF ((Previous Interview Date = RESPONSE) AND (Month told had stroke = RESPONSE)) AND
(Year told had stroke = RESPONSE) and refreshment sample indicator <> yes
[PrevDate = RESPONSE AND HeAgeR = RESPONSE AND HeAgeRY = RESPONSE AND
NOT(HFFW.Refresh = 1)]

    CHECK: PrevDate <= TODATE (year told had a stroke, month told had a stroke.ORD, 28)
    [PrevDate <= TODATE HeAgeRY, HeAgeR.ORD, 28]

    INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please
    check!

    END CHECK
END OF FILTER

HE34 HEDIAB
HE35 HEDIAB

IF types of chronic condition = None [HeDiab = None]

    CHECK: types of chronic condition.CARDINAL = 1 [HeDiab.CARDINAL = 1]

    INTERVIEWER: 'None' is an exclusive code at this question.
    Please change!

    END CHECK
END OF FILTER

LOOP FOR Idx:= 1 TO 10

    IF Reason chronic condition disputed = Has Now [HeDiaM = 3]

        CHECK: (Idx = types of chronic condition) INVOLVING (types of chronic condition)
        [Idx = HeDiab INVOLVING HeDiab]

        INTERVIEWER: Respondent has reported they have ^XCon[idx] at a previous question
        (reason chronic condition disputed).
        Please add code ^idx to this question.

        END CHECK
    END OF FILTER
END OF FILTER

```

**HE36 HEAGF**

*IF (Respondent Age > 0) AND (When first told had arthritis = RESPONSE)  
[IAgeOf > 0 AND HeAgf = RESPONSE]*

CHECK: age first told had arthritis <= Respondent Age [HeAgf <= IAgeOf ]

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!  
Please change!

END CHECK

END OF FILTER

**HE37 HEAGFRY**

**HE38 HEAGFRY**

*IF (Interview Date = RESPONSE) AND (Month told had arthritis = RESPONSE) AND (Year told had arthritis = RESPONSE)*

*[SIntDat = RESPONSE AND HeAgfR = RESPONSE AND HeAgfRY = RESPONSE]*

CHECK: Interview Date >= TODATE (age told had arthritis, month told had arthritis.ORD, 1)  
[SIntDat >= TODATE HeAgfRY, HeAgfR.ORD, 1 ]

INTERVIEWER: This date is in the future (^HeAgfR ^HeAgfRY)! Please change!

END CHECK

END OF FILTER

*IF ((Previous Interview Date = RESPONSE) AND (Month told had arthritis = RESPONSE)) AND  
(Year told had arthritis = RESPONSE) and refreshment sample indicator <> yes*

*[PrevDate = RESPONSE AND HeAgfR = RESPONSE AND HeAgfRY = RESPONSE AND  
NOT(HFFW.Refresh = 1)]*

CHECK: PrevDate <= TODATE (age told had arthritis, month told had arthritis.ORD, 28)  
[PrevDate <= TODATE HeAgfRY, HeAgfR.ORD, 28 ]

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!

END CHECK

END OF FILTER

**HE39 HEAGG**

**HE40 HEAGG**

*IF (Respondent Age > 0) AND (Age first told had cancer = RESPONSE)  
[IAgeOf > 0 AND HeAgg = RESPONSE]*

CHECK: age first told had cancer <= Respondent Age [HeAgg <= IAgeOf ]

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!  
Please change!

END CHECK  
END OF FILTER

*IF age first told had cancer = RESPONSE [HeAgg = RESPONSE]*

*CHECK: age first told had cancer > 35 [HeAgg > 35 ]*

This seems young (^heagg), can I check?

END CHECK

END OF FILTER

**HE41 HEAGGRY**  
**HE42 HEAGGRY**

*IF (Interview Date = RESPONSE) AND (Month told had cancer = RESPONSE) AND (Year told had cancer = RESPONSE)*  
*[SIntDat = RESPONSE AND HeAggR = RESPONSE AND HeAggRY = RESPONSE]*

*CHECK: Interview Date >= TODATE (year told had cancer, month told had cancer, 1)*  
*[SIntDat >= TODATE HeAggRY, HeAggR.ORD, 1 ]*

INTERVIEWER: This date is in the future (^HeAggR ^HeAggRY)! Please change!

END CHECK

END OF FILTER

*IF (Previous Interview Date = RESPONSE) AND (Month told had cancer = RESPONSE) AND (Year told had cancer = RESPONSE) and refreshment sample indicator <> yes*  
*[PrevDate = RESPONSE AND HeAggR = RESPONSE AND HeAggRY = RESPONSE AND NOT(HFFW.Refresh = 1)]*

*CHECK: PrevDate <= TODATE (year told had cancer, month told had cancer.ORD, 28)*  
*[PrevDate <= TODATE HeAggRY, HeAggR.ORD, 28 ]*

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!

END CHECK

END OF FILTER

**HE43 HEPRK**  
**HE44 HEPRK**

*IF (Respondent Age > 0) AND (Age first told had Parkinson's disease = RESPONSE)*  
*[IAgeOf > 0 AND HePrk = RESPONSE]*

*CHECK: age first told had Parkinson's disease <= Respondent Age [HePrk <= IAgeOf]*

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now!

Please change!  
END CHECK  
END OF FILTER

*IF age first told had Parkinson's disease = RESPONSE [HePrk = RESPONSE]*

CHECK: age first told had Parkinson's disease > 50 [HePrk > 50]  
This seems young (^heprk), can I check?  
END CHECK

END OF FILTER

**HE45 HEPRKRY**  
**HE46 HEPRKRY**

*IF Interview Date = RESPONSE [SIntDat = RESPONSE]*

CHECK: Interview Date >= TODATE  
(year told had Parkinson's disease, month told had Parkinson's disease.ORD, 1)  
[SIntDat >= TODATE HePrkRY, HePrkR.ORD, 1]  
INTERVIEWER: This date is in the future (^HePrkR ^HePrkRY)! Please change!  
END CHECK  
END OF FILTER

*IF ((Previous Interview Date = RESPONSE) AND (Month told had Parkinson's disease = RESPONSE))  
AND (Year told had Parkinson's disease = RESPONSE) AND refreshment sample indicator <> yes  
[PrevDate = RESPONSE AND HePrkR = RESPONSE AND HePrkRY = RESPONSE AND  
NOT(HFFW.Refresh = 1)]*

CHECK: PrevDate <= TODATE  
(year told had Parkinson's disease, month told had Parkinson's disease.ORD, 28)  
[PrevDate <= TODATE HePrkRY, HePrkR.ORD, 28]  
INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!  
END CHECK  
END OF FILTER

**HE47 HEAGH**

*IF (Respondent Age > 0) AND (Age first told had psychiatric problems = RESPONSE)  
[IAgeOf > 0 AND HeAgh = RESPONSE]*

*CHECK: age first told had psychiatric problems <= Respondent Age [HeAgh <= IAgeOf ]*

INTERVIEWER: ^IName[Pnum] is only ^iageof[Pnum] now!  
Please change!

END CHECK

END OF FILTER

**HE48 HEAGHRY**  
**HE49 HEAGHRY**

*IF (Interview Date = RESPONSE) AND (Month told had psychiatric problems = RESPONSE) AND  
(Year told had psychiatric problems = RESPONSE)  
[SIntDat = RESPONSE AND HeAghR = RESPONSE AND HeAghRY = RESPONSE]*

*CHECK: Interview Date >= TODATE  
(year told had psychiatric problems, month told had psychiatric problems.ORD, 1)  
[SIntDat >= TODATE HeAghRY, HeAghR.ORD, 1 ]*

INTERVIEWER: This date is in the future (^HEAghR ^HEAghRY)! Please change!

END CHECK

END OF FILTER

*IF (Previous Interview Date = RESPONSE) AND (Month told had psychiatric problems = RESPONSE)  
AND (Year told had psychiatric problems = RESPONSE) AND refreshment sample indicator <> yes  
[PrevDate = RESPONSE AND HeAghR = RESPONSE AND HeAghRY = RESPONSE AND  
NOT(HFFW.Refresh = 1)]*

*CHECK: PrevDate <= TODATE  
(year told had psychiatric problems, month told had psychiatric problems.ORD, 28)  
[PrevDate <= TODATE HeAghRY, HeAghR.ORD, 28 ]*

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!

END CHECK

END OF FILTER

**HE50 HEAGI**  
**HE51 HEAGI**

*IF (Respondent Age > 0) AND (Age first told had Alzheimer's = RESPONSE) [IAgeOf > 0 AND HeAgi =  
RESPONSE]*

*CHECK: age first told had Alzheimer's disease <= Respondent Age [HeAgi <= IAgeOf ]*

INTERVIEWER: ^IName[Pnum] is only ^iageof[Pnum] now!  
Please change!

END CHECK

END OF FILTER

*IF age first told had Alzheimer's disease = RESPONSE [HeAgi = RESPONSE]*

*CHECK: age first told had Alzheimer's disease > 50 [HeAgi > 50 ]*

This seems young (^heagi), can I check?

END CHECK

END OF FILTER

**HE52 HEAGIRY**

**HE53 HEAGIRY**

*IF (Interview Date = RESPONSE) AND (Month told had Alzheimer's = RESPONSE) AND  
(Year told had Alzheimer's = RESPONSE)*

*[SIntDat = RESPONSE AND HeAgiR = RESPONSE AND HeAgiRY = RESPONSE]*

*CHECK: Interview Date >= TODATE*

*(year told had Alzheimer's disease, month told had Alzheimer's disease.ORD, 1)*

*[SIntDat >= TODATE HeAgiRY, HeAgiR.ORD, 1 ]*

INTERVIEWER: This date is in the future (^HeAgiR ^HeAgiRY)! Please change!

END CHECK

END OF FILTER

*IF (Previous Interview Date = RESPONSE) AND (Month told had Alzheimer's = RESPONSE) AND  
(Year told had Alzheimer's = RESPONSE) AND refreshment sample indicator <> yes*

*[PrevDate = RESPONSE AND HeAgiR = RESPONSE AND HeAgiRY = RESPONSE AND  
NOT(HFFW.Refresh = 1)]*

*CHECK: PrevDate <= TODATE*

*(year told had Alzheimer's disease, month told had Alzheimer's disease.ORD, 28)*

*[PrevDate <= TODATE HeAgiRY, HeAgiR.ORD, 28 ]*

INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!

END CHECK

END OF FILTER

**HE53 HEAGJ**

**HE54 HEAGJ**

*IF (Respondent Age > 0) AND (age first told had dementia = RESPONSE)*

*[IAgeOf > 0 AND HeAgj = RESPONSE]*

*CHECK: age first told had dementia <= Respondent Age [HeAgj <= IAgeOf ]*

INTERVIEWER: ^IName[Pnum] is only ^ageof[Pnum] now! Please change!  
END CHECK  
END OF FILTER

*IF age first told had dementia = RESPONSE [HeAgj = RESPONSE]*

CHECK: age first told had dementia > 50 [HeAgj > 50]  
This seems young (^heagj), can I check?  
END CHECK

END OF FILTER

**HE56 HEAGJRY**  
**HE57 HEAGJRY**

*IF (Interview Date = RESPONSE) AND (month told had dementia = RESPONSE) AND  
(Year told had dementia = RESPONSE)  
[SIntDat = RESPONSE AND HeAgjR = RESPONSE AND HeAgjRY = RESPONSE]*

CHECK: Interview Date >= TODATE (year told had dementia, month told had dementia.ORD, 1)  
[SIntDat >= TODATE year told had dementia, month told had dementia.ORD, 1]  
INTERVIEWER: This date is in the future (^HeAgjR ^HeAgjRY)! Please change!  
END CHECK  
END OF FILTER

*IF (Previous Interview Date = RESPONSE) AND (Month told had memory impairment = RESPONSE)  
AND (Year told had memory impairment = RESPONSE) AND refreshement sample indicator = Yes  
[PrevDate = RESPONSE AND HeAgjR = RESPONSE AND HeAgjRY = RESPONSE AND  
NOT(HFFW.Refresh = Yes)]*

CHECK: PrevDate <= TODATE (year told had dementia, month told had dementia, 28)  
[PrevDate <= TODATE HeAgjRY, HeAgjR.ORD, 28]  
INTERVIEWER: This date is before the date of ^IName[Pnum]'s last interview. Please check!  
END CHECK  
END OF FILTER

**HE58 HEFLB**

*IF (whether post-interview editing question = Yes) AND (Number of times fallen down =RESPONSE)  
[EditQre = 1 AND HeFlb = RESPONSE]*

CHECK: (number of times fallen down > 0) INVOLVING (whether fallen down, number of times fallen down)

[HeFlb > 0 INVOLVING HeFla, HeFlb]

EDIT: Number of Falls  
number of times fallen down=0  
Please change whether fallen down to 'no'.

END CHECK

END OF FILTER

## HE59 HEADLA

*IF None = activities has difficulties doing (set A) [None = HeADLa]*

CHECK: activities has difficulties doing (set A).CARDINAL = 1  
[HeADLa.CARDINAL = 1 ]

INTERVIEWER: 'None' is an exclusive code at this question.  
Please change!

END CHECK

END OF FILTER

## HE60 HEADLB

*IF activities has difficulties doing (set B) = None [None = HeADLb]*

CHECK: activities has difficulties doing (set B).CARDINAL = 1 [HeADLb.CARDINAL = 1 ]

INTERVIEWER: 'None' is an exclusive code at this question.  
Please change!

END CHECK

END OF FILTER

## SC1 CAHIN

*IF who provides care = none [CaHin=none]*

CHECK: (CaHIn.CARDINAL = 1)

Did you mean to choose 'None of the above' as well as one of the other codes? Please change.

END CHECK

END OF FILTER

## SC2 CAHFO

*IF who provides care = none [CaHFo=none]*

CHECK: (CaHFo.CARDINAL = 1)

Did you mean to choose 'None of the above' as well as one of the other codes? Please change.

END CHECK

END OF FILTER

**SC3 CAPNO**

**SC4 CAPNO**

**SC5 CAPNO**

*IF person number = RESPONSE [pnober = RESPONSE])*

CHECK: (DMpres[pnober.ORD] = YES) INVOLVING(pnober)

This code is not valid for this question.

END CHECK

CHECK: pnober <> prespno INVOLVING(pnober)

This code is the respondent - please change!

END CHECK

CHECK: Cahadp[pnober.ord] <=1 INVOLVING(pnober)

Already had this person - please change!.

END CHECK

END OF FILTER

**SC6 CAHHC**

**SC7 CAHHC**

**SC8 CAHHC**

CHECK: (qhelpc[1].CaHHc=response) and (qhelpc[2].CaHHc=response) then (qhelpc[1].CaHHc <> qhelpc[2].CaHHc)

[^I/do/does] [^you/[^name]] have different people helping with different things?

IF yes - SELECT MAIN TASK

IF no - please change

END CHECK

CHECK: (qhelpc[1].CaHHc=response) and (qhelpc[3].CaHHc=response) then (qhelpc[1].CaHHc <> qhelpc[3].CaHHc)

[^I/do/does] [^you/[^name]] have different people helping with different things?

IF yes - SELECT MAIN TASK

IF no - please change

END CHECK

CHECK: (qhelpc[2].CaHHc=response) and (qhelpc[3].CaHHc=response) then (qhelpc[2].CaHHc <> qhelpc[3].CaHHc)

[^I/do/does] [^you/[^name]] have different people helping with different things?

IF yes - SELECT MAIN TASK

IF no - please change

END CHECK

## SC9 CAHRF

*IF Number of hours care provided for = RESPONSE [CaHrF[ploop] = RESPONSE]*

CHECK: CaHrF[ploop] < 30

That is a high number of hours. Check this is correct and amend if necessary

END CHECK

END OF FILTER

## SC10 CADP

*IF Type of payment = Neither [CaDP=3]*

CHECK: cardinal(CaDP)=1

'Neither' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## SC11 CAPAD

*IF Other Payment = NO [CaPAd = 2]*

CHECK: (CARDINAL(CaPAd) = 1)

'Nobody' is an exclusive code. Please change!

END CHECK

END OF FILTER

## HE61 CACLUB

*IF other help = None [CaClub=96]*

CHECK: (CaClub.CARDINAL = 1)

'None of these' is an exclusive code for this question.  
END CHECK  
END OF FILTER

## HE62 HEAID

*IF walking aids used = None [HeAid=96]*  
CHECK: (CARDINAL(HEAid) = 1)  
'None of these' is an exclusive code for this question. Please change!  
END CHECK  
END OF FILTER

## HE63 HEAP2

CHECK: (HeAP2 <> No) INVOLVING(HeAidP)  
INTERVIEWER: Please go back and add who else paid for mobility aid at HeAidP.  
END CHECK

## HE64 HESKB HE65 HESKB HE66 HESKC HE67 HESKC

*IF number of cigarettes smoked on weekday = RESPONSE [HeSkb = RESPONSE]*  
CHECK: number of cigarettes smoked on weekday <= 200 [HeSkb <= 200 ]  
INTERVIEWER: This is more than 200 a day. Please change.  
END CHECK  
CHECK: number of cigarettes smoked on <= 60 [HeSkb <= 60 ]  
INTERVIEWER: This seems high (^heskb). Please check.  
END CHECK  
END OF FILTER

*IF number of cigarettes smoked a day at weekends = RESPONSE [HeSkc = RESPONSE]*  
CHECK: number of cigarettes smoked a day at weekends <= 200 [HeSkc <= 200 ]  
INTERVIEWER: This is more than 200 a day. Please change.

END CHECK

CHECK: number of cigarettes smoked a day at weekends <= 60 [HeSkc <= 60 ]

INTERVIEWER: This seems high (^heskc). Please check.

END CHECK

END OF FILTER

**HE68 HETBB**

**HE69 HETBB**

**HE70 HETBB**

*IF amount of tobacco smoked on weekday = RESPONSE [HETbb = RESPONSE]*

CHECK: amount of tobacco smoked on weekday <= 200 [HETbb <= 200]

INTERVIEWER: This is more than 200 a day. Please change.

END CHECK

*IF tobacco smoked on weekday - whether grams or ounces reported = Ounces [HeTba = 2]*

CHECK: amount of tobacco smoked on weekday <= 4 [HETbb <= 4]

INTERVIEWER: This seems high (^hetbb ^hetba). Please check.

END CHECK

ELSE

CHECK: amount of tobacco smoked on weekday <= 120 [HETbb <= 120]

INTERVIEWER: This seems high (^hetbb ^hetba). Please check.

END CHECK

END OF FILTER

END OF FILTER

**HE71 HETBD**

**HE72 HETBD**

**HE73 HETBD**

*IF amount of tobacco smoked a day at weekends = RESPONSE [HETbd = RESPONSE]*

CHECK: amount of tobacco smoked a day at weekends <= 200 [HETbd <= 200 ]

INTERVIEWER: This is more than 200 a day. Please change.

END CHECK

*IF amount of tobacco smoked a day at weekends = Ounces [HeTbc =2]*

CHECK: amount of tobacco smoked a day at weekends <= 4 [HETbd <= 4 ]

INTERVIEWER: This seems high (^hetbd ^hetbc). Please check.

END CHECK

ELSE

CHECK: amount of tobacco smoked a day at weekends <= 120 [HETbd <= 120 ]

INTERVIEWER: This seems high (^hetbd ^hetbc). Please check.

END CHECK

END OF FILTER

END OF FILTER

**HE74 HEMEN**

**HE75 HEMEN**

*CHECK: IF (HEMEN = RESPONSE) THEN (HEMEN <= 20) OR (HEMEN = 95)*

Are you sure the respondent started their periods after the age of 20? If yes please explain in a note.

END CHECK

*CHECK: (HEMEN >= 8) OR (HEMEN = 95)*

Are you sure the respondent started their periods before the age of 8? If yes please explain in a note.

END CHECK

**HE76 HEPEE**

*IF (HEPEE = yes)*

*CHECK: (HEHYE <> yes AND HEOVE <> Yes) INVOLVING (HEPEE)*

Interviewer: Are you sure the respondent has had a period in the last 12 months, as they have said that they have had their uterus, womb or ovaries removed? If yes please explain in a note.

END CHECK

END OF FILTER

**HE77 HEPEY**

*IF (SIIIntDat = RESPONSE)*

*CHECK:(YEAR(SIIIntDat) >= HEPEY) INVOLVING(HePey)*

INTERVIEWER: This date is in the future (^HePey)! Please change!

END CHECK  
END OF FILTER

**HE78 HEPEA**  
**HE79 HEPEA**

*IF (HEPEA = RESPONSE) THEN*

CHECK: (HEPEA >= 20)

Interviewer: Are you sure respondent period stopped at this age? If so please explain in a note.

END CHECK

CHECK: (HEPEA >= HEMEN) INVOLVING(HEPEA)

Interviewer: Are you sure respondent period stopped at this age? If so please explain in a note.

END CHECK

END OF FILTER

**HE80 HEHFY**  
**HE81 HEHFY**

CHECK: (HEHFY <= SIIIntDat.YEAR)

You have entered a future year. Please check and amend.

END CHECK

CHECK: (HEHFY = SIIIntDat.YEAR) THEN (HEHFM <= SIIIntDat.MONTH)

You have entered a future date. Please check and amend.

END CHECK

**HE82 HEPEY**

*IF (SIIIntDat = RESPONSE)*

CHECK: (YEAR(SIIIntDat) >= HEHST) INVOLVING(HePey)

INTERVIEWER: This date is in the future (^HEHST)! Please change!

END CHECK

END OF FILTER

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 4 SOCIAL PARTICIPATION MODULE (SP)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## SOCIAL PARTICIPATION MODULE (SP)

### SPCAR

^[Do you/ Does [^name]] have use of a car or van when ^[you/he/she] need^s one (either as a passenger or driver)?

1 Yes

2 No

*IF has use of car or van = Yes [SPCar = 1]*

### SPCARA

^[Do you/ Does [^name] ever drive this car or van ^[yourself/himself/herself]?

1 Yes

2 No, passenger only

END OF FILTER

*IF has use of a car or van = No OR personally drives = No [(SPCar = 2) OR (SPCarA = 2)]*

### SPCarB

In the past ^[did you/ did [^name]] drive a car or van ^[yourself/himself/herself]?"

1 Yes

2 No

END OF FILTER

### SPTRAAC

SHOW CARD D1

How often [^do you/doeas ^[name]] use public transport?

1 Every day or nearly every day

2 Two or three times a week

3 Once a week

4 Two or three times a month

5 Once a month or less

6 Never

*IF uses public transport = two or three times a month, or less [SPTraA = 4, 5, 6]*

### SPTRAB

SHOW CARD D2

Why don't you use public transport more often?

PROBE: What else?

CODE ALL THAT APPLY.

1 No public transport available

2 Public transport available does not take me where I want to go

3 Too expensive

4 Unreliable

5 Infrequent

6 My health prevents me

7 Do not need to

8 Fear of crime

9 Too dirty

10 Not convenient

11 Prefer to walk

12 Difficulties with mobility  
95 Other (specify)

**[Multiple responses to SPTRAB are recoded in variables: SPTRAB1 to SPTRAB11, SPTRAB 95]**  
**[Code maximum 7 out of 8 possible responses]**

*IF Reasons for not using public transport = other [SPTrB = 95]*

**SPPUBX @**

INTERVIEWER: Enter details of other reasons.  
String 60

**[Open responses to SPPUBX are coded and merged with the multiple responses to SPTRAB (recoded as above). These merged responses are recoded in variables SPTRAM1 to SPTRAM12, SPTRAB85 & SPTRAB86]**

END OF FILTER

END OF FILTER

*IF age >=65 or drives own car = no [(IAgeOf{Pno} >=65) or (SPCarA = 2)]*

**SPTRO @**

SHOW CARD D3

^[Do you/Does ^[name]] ever use any of the following means of transport?

INTERVIEWER: Code all that apply.

Community transport (Code 3) does not apply to vehicles used exclusively by a care home for their own needs.

- 1 Lifts from family or friends not lived with
- 2 Taxi
- 3 Door-to-door community transport, e.g. dial-a-ride
- 4 Transport provided by hospital / day centre / lunch club
- 5 ^[(Care home respondents only) Transport provided by care home]
- 96 None of these

**[Responses to SPTRO are Recoded in variables SPTRO1 to SPTRO5, SPTRO96]**

*IF other transport used = family [SpTrO = 1]*

**SPLIFT**

SHOW CARD D4

How often ^[do you/does ^[name]] get lifts from family or friends who do not live with ^[you/him/her]?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = taxi [SpTrO =2]*

**SPTAXI**

SHOW CARD D4

How often ^[do you/does name] use a taxi?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = door-to-door community transport [SpTrO= 3]***SPDTDT**

SHOW CARD D4

How often ^[do you/does ^[name]] use door-to-door community transport?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = hospital [SpTrO=4]***SPHOSP**

SHOW CARD D4

How often ^[do you/does ^[name]] use transport provided by the hospital/day centre/lunch club?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

END OF FILTER

**W6: Removed SPSINT, SPSAre, SPSAcc***IF age >= 60 [IAgeOf{Pno} >=60]***SPBSPS**

^Do you/ Does ^[name]] have a concessionary travel bus pass issued by ^[your/his/her] local authority?INTERVIEWER: If the respondent is in London, please prompt that this pass could be called The Freedom Pass.

INTERVIEWER: This pass allows free bus travel on off-peak buses.

01 Yes

02 No

*IF has bus travel pass = yes [SpBsPs = 1]*

**SPBSTM**

In the last month, how many times ^[have you/has ^[name]] used ^[your/his/her] concessionary travel bus pass when boarding a bus?

INTERVIEWER: If ^youname[PNo] used the pass several times to make one journey please include each boarding. If respondent needs further clarification - for example if ^[you/^name] used two buses for a single journey this would count as two boardings."

- 0 None
- 1 1-5
- 2 6-10
- 3 11-20
- 4 21 or more

END FILTER

END FILTER

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 5 WORK AND PENSIONS MODULE (WP)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

**WPINT\* @**

Now I have some questions about work, retirement and pensions.

1 Press <1> and <Enter> to continue.

**WPACT\* @**

SHOW CARD E1

Did ^[you/name] do any of these activities during the last month, that is since ^[date one month ago]?

IF YES, PROBE: Which ones?

CODE ALL THAT APPLY.

- 1 Paid work
- 2 Self-employment
- 3 Voluntary work
- 4 Cared for someone
- 5 Looked after home or family
- 6 Attended a formal educational or training course
- 96 None of these

**[Responses to WPACT are recoded in variables WPACTPW WPACTVW WPACTSE WPACTCA  
WPACTLO WPACTED WPACT96]**

**[CHECK WP1]**

*IF activity during last month <> paid work AND activity during last month <> self employment  
[WpAct <> 1 AND WpAct <> 2]*

**WPAWAY\***

Can I just check, at any point during the last month ^[were you/ was name]...READ OUT...

- 1 ... temporarily away from paid work,
- 2 looking for paid work,
- 3 or, waiting to take up paid work already accepted?
- 96 None of these

END FILTER

*Derivation of WpActW: IF (WpAct = 1) OR (WpAct = 2) THEN WpActW:= 1. PaidW*

*ELSEIF (Wpaway = 1) THEN WpActW:=2. tempaway*

*ELSEIF (WPaway = 3) THEN WpActW:= 3. waitwork*

*ELSEIF (WpAct = RESPONSE OR WpAway = RESPONSE) THEN WpActw:= 4. Nowork*

*IF derived activity status = temporarily away from paid work [WPActW = 2]*

**WPTAW\***

What was the main reason ^[you were /^name] was] away from work last month?

CODE ONE ONLY

- 01 Leave/holiday
- 02 Sick/injured
- 03 Attending a training course
- 04 Laid off/on short time
- 05 On strike
- 06 Maternity/Paternity leave
- 07 Other personal/family reasons
- 85 Other answer - not codeable 01-07
- 86 Irrelevant answer - not codeable 01-07
- 95 Other reasons (SPECIFY)

*IF reason temporarily away from paid work = Other [WpTaw = 95]*

**WPTAWO\*@**

INTERVIEWER WRITE IN OTHER REASON

String: 60

END FILTER

END FILTER

**WPDES\***

SHOW CARD E2

Which one of these, would you say best describes ^[your/name's] current situation?

CODE ONE ONLY.

- 1 Retired
- 2 Employed
- 3 Self-employed
- 4 Unemployed
- 5 Permanently sick or disabled
- 6 Looking after home or family
- 95 Other (SPECIFY)
- 96 SPONTANEOUS : Semi-retired

*IF current economic situation = Other [WpDes = 95]*

**WPDESA\*@**

INTERVIEWER: Write in the other situation.

String: 60

END FILTER

*IF activity during last month <>formal educational or training course [WpAct<> 6]*

**WPEDC\***

Have ^[you/name] taken a formal educational or training course in the last 12 months?

- 1 Yes
- 2 No

END FILTER

**WPVW\***

How often ^[do you / does name] you do voluntary work? Is it ... READ OUT ...

- 1 ... twice a month or more,
- 2 about once a month,
- 3 every few months,
- 4 about once or twice a year,
- 5 less than once a year,
- 6 or, never?

*IF ((derived activity status <> paid work, temporarily away from paid work or waiting to take up paid work already accepted AND (Age < 70))  
[(WPActW <> 1,2,3)] AND (AgeP <70)])*

*IF derived activity status at last interview = not in paid work [WpActw (Last Int) = 4]*

**WPJOB\***

Can I just check, have ^[you/name] had a paid job since last time we interviewed ^[you/name] ^on date of last interview?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

- 1 Yes
- 2 No

ELSE

*IF derived activity status at last interview paid work, temporarily away from paid work or waiting to take up paid work already accepted [WpActw (Last int) = 1,2,3]*

**WPJOBL\***

Last time we interviewed ^[you were / ^[name] was] [^working/about to start work] as a [^job title]. Is this still ^[your / name's] most recent job?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

*IF (derived activity status = paid work, temporarily away from paid work) AND (derived activity status at last interview = paid work, temporarily away from paid work, waiting for work already accepted)  
[(WPActW = 1,2) AND (WpActW (Last int) = 1,2,3)]*

**WPSTJ\***

Last time we interviewed ^[you, you were / name, name was] [^working/about to start work] as a [^job title]. Is this still ^[your / name's] main job?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

If more than one job, main = the job with most hours.

If equal hours: main = the highest paid job.

- 1 Yes
- 2 No

*IF employee status at last interview = employee [WpESd (Last Int) =1]*

**WPEMP\***

^[Are you/ Is name] still working for the same employer?

INTERVIEWER:If self-employed, code 'no'

- 1 Yes
- 2 No

```

END FILTER
END FILTER

IF derived activity status = not in paid work AND activity status at last interview <> RESPONSE
[(WPActW = 4) AND (WpActw (Last int) <> RESPONSE)]

WPEVER*
^[Have you/Has ^[name]] ever done any paid work?
  1 Yes
  2 No

END FILTER

WPASKD
Computed: Ask WPJDO or not

WPASKE
Computed: Ask WPEST or not

WPASKF
Computed: Ask WPDET or not

IF (Wpactw IN [PaidW, Tempaway, WaitWork]) AND (IFFW[PNum].WpActW = NoWork OR
IFFW[PNum].WpActw <> RESPONSE)
THEN WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF (WPActw IN [waitwork])
THEN WpAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF WPJob = Yes OR Wpjobl = No OR WPStj = No OR Wpever = Yes
THEN WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND ((WpJobl = Yes) OR (WpStj = Yes AND WpEmp = Yes)) OR
(WpStj = Yes AND IFFW[PNum].WpEsd <> EMPTY AND IFFW[PNum].WpEsd <> employee))
THEN WPAskD:= Yes; WPAskE:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND IfFW[pnum].Jobtitle <> RESPONSE AND
((WpJobl = Yes) OR (WpStj = Yes AND WpEmp = Yes) OR (WpStj = Yes AND IFFW[PNum].WpEsd <> EMPTY
AND IFFW[PNum].WpEsd <> employee)))
THEN WPAskf:= Yes

IF IFFW[pnum].SOC <> SOC2000 AND (WpJob = No) AND (IFFW[PNum].WpEver = yes)
THEN WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF WpStj = Yes AND IFFW[PNum].wpelsa <> elsaw1 AND (WpEmp = Yes OR (IFFW[PNum].WpEsd <>
EMPTY AND IFFW[PNum].WpEsd <> employee))
THEN WpASkE:= Yes

IF WpStj = Yes AND WpEmp = No
THEN WpASkD:= Yes; WpASkE:= Yes

```

*IF whether same main job = No OR same employer = No [(WpStj = 2) OR (WpEmp = 2)]*

**WPLJOB\*** @

SHOW CARD E3

What were ^[your/name's] reasons for leaving ^[your/name's] previous [^employer/job]?

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 95 Other reason

[code maximum 11 out of 11 possible responses]

**[Responses to WPLJOB are recoded in variables WPLJOIL WPLJOTI WPLJPODI  
WPLJOCL WPLJORE WPLJOVO WPLJOSP WPLJOCA WPLJOFE WPLJOMO  
WPLJO95]**

*IF reason for leaving previous job/employer = other [WpLJob = 95]*

**WPLJOBX** @

What was this reason?

String: 60

**[Open responses to WPLJOBX are coded and merged with the multiple  
responses to WPLJOB in variables WPLJOMIL WPLJOMTI  
WPLJOMDI WPLJOMCL WPLJOMRE WPLJOMVO WPLJOMSP  
WPLJOMCA WPLJOMFE WPLJOMMO WPLJOMBE WPLJOMCF WPLJOMPR  
WPLJOMER WPLJOMSE WPLJOMSA WPLJOMME WPLJOM85 WPLJOM86]**

END FILTER

*IF WpLJob = RESPONSE*

*IF more than one reason for leaving previous job [WpLJob.CARDINAL > 1]*

**WPLJOBM\***

MERGED AFTER EDIT

What was ^[your/name's] main reason for leaving your previous [^employer/job]?

CODE ONE ONLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area

85 Other answer - not codeable 01 to 10  
86 Irrelevant response - not codeable 01 to 10  
95 Other reason

**[CHECK WP2]**

END FILTER  
END FILTER  
END FILTER

*IF (same main job <> Yes) AND (same employer <> yes OR employee status at last interview <> self-employed, DK, RF) AND NOT ((whether the same main job <> yes) AND (same employer <> yes) OR (employee status at last interview =self-employed, DK, RF))  
[WpActW (Last int) = 1,2,3 AND NOT ((WpStj <> 1) AND ((WpEmp <>1) OR (WpEsD (Last int) = 2, DK, RF))]*

**WPESP\*\***

[^Are you/Is name/will you be/will name be] READ OUT ...  
1 ... an employee,  
2 or, self-employed in main job?

END FILTER

*Derivation of WPAskD, WPAskE, WPAskF:*

IF (Wpactw IN [PaidW,Tempaway,WaitWork]) AND (WpActW (Last int) = NoWork OR WpActw (Last int) <> RESPONSE); WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF (WPActw IN [waitwork]); WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF WPJob = Yes OR Wpjobl = No OR WPstj = No OR Wpever = Yes; WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND ((WpJobl = Yes) OR (WpStj = Yes AND WpEmp = Yes) OR (WpStj = Yes AND IFFW[PNum].WpEsd <> EMPTY AND IFFW[PNum].WpEsd <> employee))); WPAskD:= Yes; WPAskE:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND IFFW[pnum].Jobtitle <> RESPONSE AND ((WpJobl = Yes) OR (WpStj = Yes AND WpEmp = Yes) OR (WpStj = Yes AND IFFW[PNum].WpEsd <> EMPTY AND IFFW[PNum].WpEsd <> employee))); WPAskf:= Yes

IF IFFW[pnum].SOC <> SOC2000 AND(WpJob = No) AND (IFFW[PNum].WpEver = yes); WPAskD:= Yes; WPAskE:= Yes; WPAskF:= Yes

IF WpStj = Yes AND IFFW[PNum].wpelsa <> elsaw1

IF (WpEmp = Yes OR (IFFW[PNum].WpEsd <> EMPTY AND IFFW[PNum].WpEsd <> employee)); WPAskE:= Yes

IF WpStj = Yes AND WpEmp = No; WpASkD:= Yes; WpASkE:= Yes

*IF whether current/last main job to report = yes [WPAskF = 1] (WpAskF is a computed variable)*

**WPDET @**

I'd like to ask some details about [^your last main job / the main job you were doing last month / the main job you were temporarily away from last month / the main job you are waiting to take up]. What is the name or title of this job?

INTERVIEWER: Job = A period of paid work with an employer or a period of continuous self-employment.

If more than one job, main = the job with the most hours.

If equal hours: main = the highest paid job.

Write in.

String: 60

END FILTER

*IF whether current/last main job to report = yes [WPAskD = 1] (WpAskD is a computed variable)*

**WPJDO @**

^I'd like to ask some details about [^your last main job / the main job you were doing last month / the main job you were temporarily away from last month / the main job you are waiting to take up]. What kind of work ^[did/do/will] you do most of the time?

IF RELEVANT: What materials / machinery ^[did/do/will] use?

String: 80

**WPQUAL @**

What skills or qualifications are needed to do this job?

WRITE IN

String: 120

**WPSUP**

^Did/Do/Will you directly supervise or ^[were you/are you/will you be] directly responsible for the work of any other people?

- 1 Yes
- 2 No

END FILTER

*IF whether current/last main job to report = yes [WPAskE = 1] (WpAskE is a computed variable)*

**WPEST**

[^Were you/Are you/Will you be]... READ OUT ...

- 1 ... an employee,
- 2 or, self-employed in your main job?

*IF current employee status = employee [Wpest = 1]*

**WPSAL**

Can I just check, [^were you/are you/will you be] paid either a salary or wage by an employer in your main job?

- 1 Yes
- 2 No

END FILTER

*IF current employee status = self-employed OR whether paid a salary or wage = no  
[(WpEst = 2 OR WpSal = 2)]*

**WPCJB @**

(Can I just check) [^were you/are you/will you be]...

INTERVIEWER: Read out each in turn and code all that apply (up to 4) ...

- 1 ... paid a salary or wage by an agency?
- 2 ... a sole Director of your own limited company?
- 3 ... running a business or professional practice?
- 4 ... a partner in a business or professional practice?
- 5 ... working for yourself?
- 6 ... a sub-contractor?
- 7 ... doing freelance work?
- 96 None of these

[code maximum 4 out of 8 possible responses]

**[Responses to WPCJB are recoded in variables WPCJAG WPCJDI WPCJBU WPCJPA  
WPCJSE WPCJSC WPCJFR WPCJ96]**

**[CHECK WP3]**

END FILTER

END FILTER

*Derivation of WpEs:*

*IF WpCJb = 1 THEN WpEs:= Employee*

*IF (WpCJb = 2) OR (WpCJb = 3) OR (WpCJb = 4) OR (WpCJb = 5) OR (WpCJb = 6) OR (WpCJb = 7)  
THEN WpEs:= SelfEmp*

*IF WpEst = Employ THEN WpEs:= Employee*

*IF WpEst = SEmploy THEN WpEs:= Selfemp*

*IF WpEst = DK THEN WpEs:= DK*

*IF WpEst = RF THEN WpEs:= RF*

*IF (WpStj = yes AND (WpEmp = Yes OR IfFW[PNum].WpEsd = DK OR IfFW[PNum].WpEsd = RF  
OR IfFW[PNum].WpEsd = Selfemp)) THEN WpEs:= IfFW[PNum].WpESd*

*IF WpEsp = RESPONSE THEN WpEs:= WpESP*

*IF WpEsp = DK THEN Wpes:= DK*

*IF WpEsp = RF THEN Wpes:= RF*

*IF current/ last job to report = yes [WPAskD = 1]*

*IF employment status = employee [WpEs = 1]*

**WPMAKE\*@**

What ^[did/does] your employer make or do at the place where you ^[usually worked/usually

work/will work]?  
String: 100

**WPNEMP**

Including yourself, about how many people are employed at the place where you ^[usually worked/usually work/will work]?

- 1 1 or 2
- 2 3 to 24
- 3 25 to 499
- 4 500+

END FILTER

*IF employment status = self-employed [WpEs = 2]*

**WPMAKS @**

What ^{did/do/will} you make or do in your business?  
String: 100

**WPEMPL**

^[Did/Do/Will] you have any employees?  
1 None  
2 1 or 2  
3 3 to 24  
4 25 to 499  
5 500+

END FILTER

END FILTER

*IF derived activity status = paid work, temporarily away from paid work AND employment status = Employee  
[(WPActW = 1,2) AND (WpEs = 1)]*

**WPNOE\***

Including yourself, about how many people, in total, work for your employer at all locations in the UK?

- 1 2-4
- 2 5-19
- 3 20-99
- 4 100-499
- 5 500-999
- 6 1000+

END FILTER

*IF derived activity status = paid work, temporarily away from paid work [WPActW =1,2]*

**WPJACT**

SHOW CARD E4

Which of these best describes the work that you do in your main job?

CODE ONE ONLY

- 1 Sedentary occupation: You spend most of your time sitting (such as in an

- office)
- 2 Standing occupation: You spend most of your time standing or walking.  
However the way you spend your time does not require intense physical effort  
(e.g. shop assistant, hairdresser, security guard etc.)
  - 3 Physical work: This involves some physical effort including handling of heavy objects and use of tools (e.g. plumber, cleaner, nurse, sports instructor, electrician, carpenter etc.)
  - 4 Heavy manual work: This involves very vigorous physical activity including handling of very heavy objects (e.g. docker, miner, bricklayer, construction worker etc.)

*IF same employer <> Yes OR employee status at last interview= Self-employed DK, Ref [(WpEmp<>1) OR (WpESD (Last int)=2,DK,RF)]*

### **WPSJOBY**

When did you start your current job?

JOB=PERIOD OF PAID WORK WITH ONE EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

ENTER YEAR AT THIS QUESTION

Range: 1900..2050

*IF year started current job = RESPONSE [WpsjobY = RESPONSE]*

### **WPSJOBM**

(When did you start your current job?)

CODE MONTH AT THIS QUESTION

IF DOESN'T KNOW MONTH, CODE SEASON

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

**[CHECKS WP4-7]**

**[CHECKS WP21-23]**

END FILTER

END FILTER

*IF derived activity status = not in paid work [WpActw = 4]*

**WPWHYWK @**

What were your reasons for starting working?

- 1 I needed the money
- 2 My own health improved
- 3 Health of relative/friend improved
- 4 For enjoyment/company at work
- 5 I was able to find a suitable job
- 95 Other reason

[code maximum 6 out of 6 possible responses]

*[Responses to WPWHYWK are recoded in variables WPWYWMO WPWYWOH  
WPWYWRH WPWYWEN WPWYWSU WPWYW95]*

*IF reason started working = other [WpWhyWk = 95]*

**WPWHYWKX @**

What was this other reason?

String: 60

*[Open responses to WPWHYWKX are coded and merged with the multiple responses to WPWHYWK. These merged responses are recoded in variables WPWYWMMO WPWYW MOH WPWYWMRH WPWYWMEN WPWYWMSU WPWYWMHH WPWYWMCH WPWYWMFI WPWYWMHE WPWYWM85 WPWYWM86]*

END FILTER

END FILTER

*IF same employer <> yes OR (employee status at last interview <> self-employed, DK, RF )  
[((WpEmp <>1) OR (WpEsD (Last int) <>2, DK, RF))]*

**WPWHYJB @**

What were your reasons for taking this job?

CODE ALL THAT APPLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job I could get
- 09 Was the first job I found
- 95 Other

[code maximum 10 out of 10 possible responses]

*[Responses to WPWHYJB are recoded in variables: WPWHYJPA WPWHYJHO  
WPWHYJTI WPWHYJCA WPWHYJCO WPWHYJBU WPWHYJFB WPWHYJON  
WPWHYJFI WPWHYJ95]*

*IF reason for taking job = other [WpWhyJb = 95]*

**WPWYJBX @**

What was this reason?

String: 60

[Open responses to WPWYJBX are coded and merged with the multiple responses to WPWYJB. These merged responses are recoded in variables:  
WPWYJMPA WPWYJMHO WPWYJMTI WPWYJMCA WPWYJMCO WPWYJMBU  
WPWYJMFB WPWYJMON WPWYJMFI WPWYJMLO WPWYJMBC WPWYJMTO  
WPWYJMCH WPWYJMMO WPWYJMHH WPWYJMPH WPWYJMHF WPWYJM85  
WPWYJM86]

END FILTER

*IF reason for taking job = RESPONSE [WpWhyJb=RESPONSE]*

*IF more than one reason for taking job [CARDINAL(WpWhyJb)>1]*

#### **WPWHYJBM**

What was your main reason for taking this job?

CODE ONE ONLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job I could get
- 09 Was the first job I found
- 95 Other

**[CHECK WP8]**

END OF FILTER

END OF FILTER

END FILTER

*IF employment status = employee [WpEs =1]*

#### **WPCJOB**

(Can I just check,) Is your current job ... READ OUT ...

- 1 ... a temporary job (lasting less than 12 months),
- 2 a fixed term job lasting between 1 and 3 years,
- 3 a fixed term job lasting more than 3 years,
- 4 or, a permanent job?

#### **WPHJOB**

How many hours a week do you usually work in this job, excluding meal breaks but including any paid overtime?

Range: 1..168

**[CHECK WP9]**

END FILTER

*IF employment status = self-employed [WpEs =2]*

**WPHWRK**

How many hours a week do you usually work, including doing the books,  
VAT and so on?

Range: 1..168

**[CHECK WP10]**

END FILTER

END FILTER

IF derived activity status <> paid work, temporarily away from paid work AND whether had a paid job  
since last interview = yes, DK, RF) OR (still in paid work = EMPTY) OR (whether ever done paid work =  
yes, DK, REF)

*[(WPActW <>1,2) AND ((WpJob = 1, DK, RF) OR (WpJobL = EMPTY) OR (WPEver = 1, DK, RF))]*

**WPWLY**

Have you done any regular paid work in last 12 months, that is since ^[date a year ago]?

- 1 Yes
- 2 No

END FILTER

*IF (derived activity status = paid work, temporarily away from paid work) OR (regular paid work in last 12  
months = yes)*

*[(WPActW =1,2) OR (WpWly = 1)]*

**WPWLYM**

How many weeks were you [^in employment/actively self-employed] during the last 12  
months, that is since ^[date a year ago] ^[], including any periods of paid leave]?

INTERVIEWER: Count each week respondent was in employment - even if only  
worked for part of the week.

Range: 1..52

**WPHLY**

How many weeks leave did you take in the last 12 months?

Range: 0..52

END FILTER

*IF regular paid work in last 12 months = yes [WpWly = 1]*

**WPWLYY**

About how much did your income from work amount to in the last year,  
including any overtime, bonuses, commissions, tips or tax refund, but before  
any deductions for tax, national insurance or pension contributions, union  
dues and so on?

Range: 0..999997

**[CHECK WP11]**

*IF regular paid work in last 12 months = DK, RF [WpWly = DK, RF]*

**WPWLYB@**

Did it amount to.....

BRACKETS (5000, 10000, 20000, 50000)

**[Bracket results are recoded in WPWLYYL, WPWLYYU, WPWLYYE, WPWLYYR]**

END FILTER

END FILTER

*IF (paid work since last interview = yes) OR (still in paid work = yes) OR (still in paid work = no) OR (ever had paid work = yes)*

*[(WpJob =1) OR (WpJobl = 1)) OR (WpJobl = 2) OR (WPEver = 1)]*

**WPLLSY**

When did your last job start?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

**[CHECK WP12]**

*IF year started last job = RESPONSE [WpllsY = RESPONSE]*

**WPLLSM**

(When did your last job start?)

INTERVIEWER:Code the month at this question.

If doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

END FILTER

**WPLLJY**

When did your last job end?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

**[CHECK WP12-14]**

*IF year last job ended = RESPONSE and year last job ended > 1990  
[(WplljY = RESPONSE) AND (WplljY > 1990)]*

**WPPLLJM**

(When did your last job end?)

INTERVIEWER: Code the month at this question.

If doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

**[CHECK WP15]**

END FILTER

*IF current economic situation <> retired, semi-retired [WpDes <> 1, 96]*

**WPYSTP @**

SHOW CARD E5

What were reasons for stopping working?

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 95 Other reason

[code maximum 15 out of 15 possible responses]

*[Responses to WPYSTP are recoded in variables WPYSTOH WPYSTTI WPSTRH WPYSTOU WPYSTRE WPYSTVR WPYSTFI WPYSTAF WPYSTFA WPYSTEN WPYSTCH WPYSTPA WPYSTYO WPYSTMO WPYST95]*

*IF reason stopped work = other [WpYSTp =95]*

**WPYSTPX @**

What was this reason?

String: 60

**[Open responses to WPYSTPX are coded and merged with the multiple responses to WPYSTP These merged responses are recoded in variables:**

**WPYSTMOH WPYSTMRH WPYSTMOU WPYSTMRE WPYSTMVR WPYSTMF  
WPYSTMAF WPYSTMFA WPYSTMEN WPYSTMCH WPYSTMPA WPYSTMYO  
WPYSTMMO WPYSTMAG WPYSTMST WPYSTM85 WPYSTM86]**

END FILTER

*IF reason stopped work = RESPONSE [WpYSTp = RESPONSE]*

*IF more than one reason for stopping work [WpYSTp.CARDINAL > 1]*

**WPYSTPM**

SHOW CARD E5

What was your main reason for stopping working?

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 95 Other reason

**[CHECK WP16]**

END FILTER

END FILTER

END FILTER

END FILTER

*IF (previously interviewed) AND (still in paid work <> yes) AND (((date started last job reported) AND (date of last interview < date started last job)) OR ((same employer = no) AND (started current job = RESPONSE) AND (date of last interview < date started current job)))*  
*[If (PrevDate[pnum] = RESPONSE) AND (Wpjbl <> 1) AND*  
*((WpllsY = RESPONSE) AND (WpllsM IN [January .. December]) AND*  
*(PrevDate < (TODATE (WpllsY, WpllsM, 1)+(0, 1, 0)))) OR (((WpEmp = 2) AND (WpsjobY =*  
*RESPONSE)) AND (WpsjobM IN [January .. December])) AND (PrevDate < (TODATE (WpsjobY,*  
*WpsjobM, 1)+(0, 1, 0))))]*

LOOP FOR kk:= 1 TO 5 [LOOP for up to 5 previous jobs]

*IF (kk = 1) OR ((kk > 1) AND (((QStEnd[kk - 1].WpOWb = No) OR*  
*(QStEnd[kk - 1].WpOWb = DK)) OR (QStEnd[kk - 1].WpOWb = RF)))*  
*[kk = 1 OR kk > 1 AND QStEndkk - 1.WpOWb = No OR QStEndkk - 1.WpOWb = DK*  
*OR QStEndkk - 1.WpOWb = RF]*

### **WPOJ**

Did ^[you/name] have another job before this one?

- 1 Yes
- 2 No

*IF whether had previous job = yes [WpOJ = 1]*

### **WPOWB**

^[Were you/Was name] working in this job at the time of the last interview?

IF ONLY WORKED IN THIS JOB BEFORE DATE OF LAST  
INTERVIEW ENTER 'NO'.

- 1 Yes
- 2 No

*IF working in previous job at time of last interview = no [WpOWb = 2]*

### **WPLPSY**

When did this job start?

INTERVIEWER:Job = A period of paid work with an employer or a period  
of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

### **[CHECK WP17]**

*IF start of job = RESPONSE [WpLpsy = RESPONSE]*

### **WPLPSM**

(When did this job start?)

INTERVIEWER:Code the month at this question. If doesn't know month,  
code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July

- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

**[CHECK WP18]**

END FILTER

END FILTER

#### **WPLPEY**

When did this job end?

INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

**[CHECK WP19]**

*IF end of job = RESPONSE [WpLpey = RESPONSE]*

#### **WPLPEM**

(When did this job end?)

INTERVIEWER:Code the month at this question. If doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

**[CHECK WP20]**

END FILTER

END FILTER  
END FILTER  
END FILTER  
END FILTER

*IF state pension age = no [AbvSPA[pnum] =2] (AbvSPA is a computed variable)*

**WPNIC**

Do you currently pay National Insurance contributions, including any that are paid on your behalf?

- 1 Yes
- 2 No

*IF currently pay NICs = yes AND paid NICs at last interview <>1 AND ever paid NICs at last interview <>1*

*[WpNIC = 2 AND WpNIC (Last int) <> 1 AND WpNICE (Last int) <> 1]*

**WPNICE**

Have you ever paid National Insurance contributions including any that have been paid on your behalf?

- 1 Yes
- 2 No

END FILTER

END FILTER

*IF sex = 2 AND Marital status <> single, in a civil partnership, separated, divorced or widowed AND ever paid NICs at last interview <> RESPONSE*

*ISex = female AND NOT (DiMar IN [1, 3, 8, 9, 10, 11]) AND WpNImw (Last int) <> RESPONSE*

**WPNIMW**

Have you ever paid NI contributions at the reduced rate for married women.

This is sometimes known as the 'half stamp'?

- 1 Yes
- 2 No

END FILTER

*IF derived activity status = paid work, temporarily away [WPActW = 1,2]*

*IF whether health limits paid work = yes [HeLWk =1]*

**WPLIMWK**

You mentioned earlier that you have a health problem or disability that limits the kind or amount of paid work you can do, does this health problem or disability limit the kind or amount of work you can do in your current job?

- 1 Yes
- 2 No

END FILTER

**WPLNJ**

Can I just check, are you currently looking for ^[any kind of paid work/a new job]?

- 1 Yes
- 2 No

*IF currently looking for work = yes [Wplnj = 1]*

**WPWHYNJ @**

SHOW CARD E6

What are the reasons for trying to leave your current job?

- 01 Own ill health or disability
- 02 Job too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company going out of business/site closing down
- 05 Being made redundant/dismissed/have no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and want a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 95 Other reason

[code maximum 13 out of 13 possible responses]

*[Responses to WPWHYNJ are recoded in variables: WPWYNOH WPWYNTI  
WPWYNRH WPWYNOU WPWYNRE WPWYNVR WPWYNFA WPWYNCH WPWYNEM  
WPWYNCA WPWYNEA WPWYNMO WPWYN95]*

*IF reason for trying to leave current job = other [WpWhyNJ = 95]*

**WPWYNJX @**

What was this other reason?

String: 60

*[Responses to WPWYNJX are combined with multiple responses to WPWHYNJ and  
recoded in variables: WPWYNMOH WPWYNMTI WPWYNMRH WPWYNMOU  
WPWYNMRE WPWYNMVR WPWYNMFA WPWYNMCH WPWYNMEM WPWYNMCA  
WPWYNMEA WPWYNMMO WPWYNMCO WPWYNMOR WPWYNMDE WPWYNMLH  
WPWYNMLO WPWYNMAB WPWYNM85 WPWYNM86]*

END FILTER

*IF reason trying to leave current job = RESPONSE AND more than one reason to leave  
[(WpWhyNJ = RESPONSE) AND (WpWhyNJ.CARDINAL > 1)]*

**WPMYNJ**

SHOW CARD E6

What is the main reason for trying to leave your current job?

- 01 Own ill health or disability
- 02 Job too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company going out of business/site closing down

- 05 Being made redundant/dismissed/have no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and want a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 95 Other reason

END FILTER

END FILTER

END FILTER

*IF main reason away from work = sick AND employment status= Employee  
[WpTaw = 2) AND (WpEs = 1)]*

#### **WPSPAY**

Can I just check ^[are you/is name]currently receiving sick pay from an employer?

- 1 Yes
- 2 No

END FILTER

*IF employment status = employee AND derived activity status = paid work, temporarily away from paid work  
[(WpEs = 1) AND (WPActW=1,2)]*

#### **WPOTP**

How much ^[are you/is name] paid including any overtime, bonuses, commissions, tips or tax refund, but before any deductions for tax, national insurance or pension contributions, union dues and so on?

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF frequency paid = RESPONSE [WpOtp = RESPONSE]*

#### **WPAOTP**

INTERVIEWER:Enter amount.

Round to nearest £.

Range: 0..9999997

**[CHECK WP21]**

END FILTER

*IF frequency paid = DK, RF OR amount paid = DK, RF*

*[((WpOtp = DK) OR (WpOtp = RF)) OR ((WpAotp = DK) OR (WpAotp = RF))*

*IF frequency paid = one week [WpOtp = 1]*

**WPAOWB @**

Is it.....

BRACKETS (200, 300, 500, 1500)

**[Bracket results are recoded in WPAOTWL WPAOTWU WPAOTWE WPAOTWR]**

END FILTER |

*IF frequency paid = two weeks [WpOtp = 2]*

**WPAOFB**

Is it.....

BRACKETS (400, 600, 1000, 3000)

**[Bracket results are recoded in WPAOTFL WPAOTFU WPAOTFE WPAOTFR]**

END FILTER

*IF frequency paid = four weeks, calendar month [WpOtp = 4, 5]*

**WPAOMB @**

Is it.....

BRACKETS (800, 1200, 2000, 6000)

**[Bracket results are recoded in WPAOTML WPAOTMU WPAOTFME WPAOTMR]**

END FILTER

*IF frequency paid = yearly, one off [WpOtp = 52, 95]*

**WPAOYB @**

Is it.....

BRACKETS (10000, 15000, 25000, 75000)

**[Bracket results are recoded in WPAOTYL WPAOTYU WPAOTFYE WPAOTYR]**

END FILTER

*IF frequency paid <>one week, two weeks, four weeks, calendar month, yearly, one off  
[Wptop <> 1, 2, 4, 5, 52, 95]*

**WPAOOB @**

Is it.....

BRACKETS (800, 1200, 2000, 6000)

**[Bracket results are recoded in WPAOTOL WPAOTOU WPAOTOE WPAOTOR]**

END FILTER  
END FILTER  
END FILTER

### **WPPERI**

Thinking about the last time [^you/he/she] [^were/was] paid, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

### **WPSLIP**

We're interested in how much tax and National Insurance gets deducted from ^[your/name's] pay. Do you have ^[your/his/her] last payslip to hand which you could consult?

INTERVIEWER: Ask or code.

- 01 Latest payslip consulted
- 02 Old payslip consulted
- 03 Payslip not consulted
- 04 No payslip provided by employer

*IF frequency paid last time = RESPONSE [WpPeri = RESPONSE]*

### **WPTHP**

What was ^[your/his/her] take-home pay last time, that is after any deductions were made for tax, National Insurance, pensions, union dues etc?

INTERVIEWER: Enter amount. Round to the nearest £.

Range: 0..9999997

### **[CHECK WP22]**

END FILTER

*IF take home pay last time = DK, RF OR frequency paid last time = DK, RF  
[(WpThp = DK) OR (WpThp = RF) OR (WpPeri = DK) OR (WpPeri = RF)]*

*IF frequency paid last time = one week [WpPeri = 1]*

### **WPTHPWB @**

Was it.....

BRACKETS (125, 200, 350, 1000)  
[Bracket results are recoded in WPTHPWL WPTHPWU WPTHPWE WPTHPWR]

END FILTER

IF frequency paid last time = TwoWeek [WpPeri = 2]

**WPTHPFB @**

Was it.....

BRACKETS (250, 400, 700, 2000)

[Bracket results are recoded in WPTHPFL WPTHPFU WPTHPFE WPTHPFR]

END FILTER

IF frequency paid last time = four weeks, calendar month [WpPeri = 4, 5]

**WPTHPMB @**

Was it.....

BRACKETS (500, 800, 1400, 4000)

[Bracket results are recoded in WPTHPML WPTHPMU WPTHPME WPTHPMR]

END FILTER

IF frequency paid last time = yearly, one off [WpPeri = 52, 95]

**WPTHPYB @**

Was it.....

BRACKETS (6000, 10000, 17500, 50000)

[Bracket results are recoded in WPTHPYL WPTHPYU WPTHPYE WPTHYR]

END FILTER

IF frequency paid <>one week, two weeks, four weeks, calendar month, yearly, one off  
[WpPeri <> 1, 2, 4, 5, 52, 95]

**WPTHPOB@**

Was it.....

BRACKETS (500, 800, 1400, 4000)

[Bracket results are recoded in WPTHPOL WPTHPOU WPTHPOE WPTH0R]

END FILTER

END FILTER

IF take home pay last time = RESPONSE [WpThp = RESPONSE]

**WPTHL**

Is this ^[your/name's] usual take home pay?

- 1 Yes
- 2 No

IF usual take home pay = no [Wpthl = No]

**WPUP**

How much ^[are you/is he/she] usually paid?  
INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF frequency of usual take home pay = RESPONSE [WpUP = RESPONSE]*

**WPUPA**

INTERVIEWER: Enter amount.  
Round to nearest £.  
Range: 0..9999997

**[CHECK WP23]**

END FILTER

*IF frequency of usual take home pay = DK, RF OR amount of usual take home pay = DK,RF  
[(WpUP = DK) OR (WpUP = RF) OR (WpUPa = DK) OR (WpUPa = RF)]*

*IF frequency of usual take home pay = one week [WpUP = 1]*

**WPUPAWB @**

Would it be.....  
BRACKETS (125, 200, 350, 1000)  
**[Bracket results are recoded in WPUPAWL WPUPAWU WPUPAWE WPUPAWR]**

END FILTER

*IF frequency of usual take home pay = two weeks [WpUP = 2]*

**WPUPAFB @**

Would it be.....  
BRACKETS (250, 400, 700, 2000)  
**[Bracket results are recoded in WPUPAFL WPUPAWU WPUPAWE WPUPAWR]**

END FILTER

*IF frequency of usual take home pay = four weeks, calendar month [WpUP = 4, 5]*

**WPUPAMB @**

Would it be.....

BRACKETS (500, 800, 1400, 4000)  
[Bracket results are recoded in WPUPAML WPUPAMU WPUPAME WPUPAMR]

END FILTER

*IF frequency of usual take home pay = yearly, one off [WpUP = 52, 95]*

**WPUPAYB @**

Would it be.....

BRACKETS (6000, 10000, 17500, 50000)

[Bracket results are recoded in WPUPAYL WPUPAYU WPUPAYE WPUPAYR]

END FILTER

*IF frequency of usual take home pay <>one week, two weeks, four weeks, calendar month, yearly, one off [WpUP <> 1, 2, 4, 5, 52, 95]*

**WPUPAOB @**

Would it be.....

BRACKETS (500, 800, 1400, 4000)

[Bracket results are recoded in WPUPAOL WPUPAOU WPUPAOE WPUPAOR]

END FILTER

END FILTER

END FILTER

END FILTER

### **WPPAYA**

INTERVIEWER: How accurate do you think the answers given by the respondent to the questions about pay were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

*IF employment status = Employee [WpES=1]*

### **WPCRET**

Is there a compulsory retirement age at ^[your/name's] current job? That is do you have to stop working when you reach a certain age?

- 1 Yes
- 2 No

*IF compulsory retirement age = yes [WPCRet = Yes]*

### **WPCRAGE**

What is the compulsory retirement age?

Range: 40..80

### **WPCRETL**

Would ^[you/name] like to work longer if employer would let ^[you/him/her]?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

*IF derived activity status = paid work, temporarily away AND employment status = self-employed [(WPActW = 1,2) AND (WpEs = 2)]*

### **WPIR**

[^Do you prepare annual business accounts/In your business are annual business accounts prepared] for the Inland Revenue for tax purposes?

- 1 Yes
- 2 No
- 3 Not yet but will be

*IF prepare annual business accounts = yes [WpIR = 1]*

### **WPAP**

Are you working on your own account or are you in partnership with someone else?

- 1 Own account (sole owner)
- 2 In partnership

*IF sole account or partnership = in partnership [Wpap = 2]*

### **WPYSH @**

The questions that follow are just about your own share of the business - that is not including your partner's share.

- 1 Press <1> and <Enter> to continue.

END FILTER

### **WPRAIR**

What is the most recent period for which accounts have been prepared for the Inland Revenue?

INTERVIEWER: Enter the year at start of the period

Range: 1900..2050

**[CHECKS WP24-26]**

*IF period last accounts prepared = RESPONSE [WpralR = RESPONSE]*

### **WPRAIM**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

INTERVIEWER: Code month at start of the period. If doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April

- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

END FILTER

#### **WPRAEY**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

INTERVIEWER: Enter year at end of the period.

Range: 1900..2050

#### **[CHECKS WP27-28]**

*/F period last accounts prepared = RESPONSE [WpraEY = RESPONSE]*

#### **WPRAEM**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

INTERVIEWER: Code month at end of the period. If doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

#### **[CHECKS WP29-30]**

END FILTER

#### **WPPROF**

What was the amount of your share of the profit or loss figure shown on these accounts for this period?

Range: 0..999997

**[CHECK WP31]**

*IF amount of profit or loss = DK, RF [(WpProf = DK) OR (WpProf = RF)]*

**WPPROFB @**

Was it.....

BRACKETS (5000, 10000, 20000, 60000)

**[Bracket results are recoded in WPPROFL WPPROFU WPPROFE WPPROFR]**

END FILTER

**WPPL**

Does this amount refer to a profit or loss?

- 1 Profit/earnings
- 2 Loss

*IF amount = profit [WpPL = 1]*

**WPBDT**

Can I just check, is that figure before deduction of income tax?

- 1 Yes (before tax)
- 2 No (after tax)
- 3 (SPONTANEOUS: Not liable for tax)

**WPBDNI**

And is that figure before deduction of National Insurance?

- 1 Yes (before NI)
- 2 No (after NI)

END FILTER

END FILTER

*IF prepare annual business accounts = no, not yet [WpIR = 2, 3]*

**WPBI**

Now I'd like to ask some questions about your income from your ^work/business, that is after paying for any materials, equipment or goods that you use in ^your work/the business. On average what was your weekly or monthly income from over the last 12 months, before deductions for any tax, national insurance or pension contributions?

INTERVIEWER: Code whether the amount will be given weekly or monthly.

- 1 Weekly
- 2 Monthly

*IF income over last 12 months = weekly [WpBI = 1]*

**WPBIWA**

INTERVIEWER: Enter average weekly income over last 12 months.

Range: 0..999997

*IF average weekly income = DK, RF [(WpBlwa = DK) OR (WpBlwa = RF)]*

**WPBIWAB @**

Was it.....

BRACKETS (200, 400, 1000, 4000)

**[Bracket results are recoded in WPBIWAL WPBIWAU WPBIWAE WPBIWAR]**

END FILTER

END FILTER

*IF income over last 12 months = monthly [WpBI = 2]*

**WPBIMA**

INTERVIEWER: Enter average monthly income over last 12 months.

Range: 0..999997

END FILTER

**[CHECK WP32]**

*IF average weekly income = DK, RF OR period of income over last 12 months = DK,RF  
[(WpBlma = DK) OR (WpBlma = RF)] OR (WpBI = DK) OR (WpBI = RF)]*

**WPBIMAB @**

Was it.....per month

BRACKETS (800, 1500, 4000, 15000)

**[Bracket results are recoded in WPBIMAL WPBIMAU WPBIMAE WPBIMAR]**

**[CHECK WP33]**

END FILTER

END FILTER

*IF self-employment description = a sole director, running a business, a partner in a business  
[(WpCJb = 2) OR (WpCJb = 3) OR (WpCJb = 4)]*

**WPBUSV**

About how much is ^[the business/your share of the business] worth?

Range: 0..99999997

**[CHECK WP34]**

*IF value of business = DK, RF [(WpbusV = DK) OR (WpbusV = RF)]*

**WPBUSVB @**

Is it.....

BRACKETS (25000, 100000, 250000, 1000000)

**[Bracket results are recoded in WPBUSVL, WPBUSVU, WPBUSVE, WPBUSVR]**

END FILTER

END FILTER

END FILTER

**WPMOJ**

[^Can I just check, do/Do] you currently earn any money from [^work that you might do from time to time/other work that you might do apart from your main job]?

INTERVIEWER: Include paid babysitting, mail order agent, pools agent, etc.

- 1 Yes
- 2 No

*IF second job = yes [WpMoJ = Yes]*

**WPHMSJ**

How many hours do you usually work a month in these jobs, excluding any meal breaks but including any overtime you might do?

Range: 1..700

**[CHECK WP35]**

**WPESJ**

After tax and any other deductions, what was your total income from these jobs in the last month?

INTERVIEWER: Enter amount.

Round to the nearest £.

Range: 0..9999997

**[CHECK WP36]**

*IF amount of income after tax = DK, RF [(WpEsj = DK) OR (WpEsj = RF)]*

**WPESJB @**

Was it.....

BRACKETS (250, 500, 1000, 2500)

**[Bracket results are recoded in WPESIL WPESJU WPESJE WPESJR]**

END FILTER

*IF amount of income after tax = 0 [(WpEsj = RESPONSE) AND (WpEsj = 0)]*

**WPESJM**

After tax and other deductions, what is your average monthly income from these jobs?

ENTER AMOUNT.

ROUND TO THE NEAREST £.

Range: 0..9999997

*IF average monthly income after tax = DK, RF [(WpEsjm = DK) OR (WpEsjm = RF)]*

**WPESJMB @**

Was it.....

BRACKETS (250, 500, 1000, 2500)

**[Bracket results are recoded in WPESMIL WPESJMU WPESJME WPESJMR]**

```
| END FILTER  
|  
END FILTER  
  
END FILTER
```

### WPBUS

Can I just check, apart from anything you've already told me about, do you own all or part of a business (as an active or sleeping partner)?

- 1 Yes
- 2 No

*IF business ownership = yes [WpBus = 1]*

### WPVBUIS

About how much is your share of the business worth?

Range: 0..99999997

*IF value of business = DK, RF [(WpVBus = DK) OR (WpVBus = RF)]*

### WPVSBUSB @

Is it.....

BRACKETS (25000, 100000, 250000, 1000000)

**[Bracket results are recoded in WPVBUSL WPVBUSU WPVBUSE WPVBUSR]**

END FILTER

```
END FILTER
```

### WPOWK\*@

What are ^[your/name's] reasons for working after State Pension Age?

CODE ALL THAT APPLY

- 1 Could not afford to retire earlier
- 2 Didn't know what to do after stopping work
- 3 Enjoyed job/working
- 4 To improve pension/financial position
- 5 To keep fit and active
- 6 To retire at the same time as husband/wife/partner
- 7 Persuaded by employer to stay on

*NPffw is the number of pensions fed forward.*

**[Responses to WPOWK recoded in: WPOWKAF WPOWKDO WPOWKEW WPOWKIF WPOWKKE WPOWKST WPOWKEP]**

PENSIONS GRID FOLLOWS

*IF number of pensions at last interview = 0 OR number of pensions at last interview <> RESPONSE  
[(NPffw = 0) OR (NPffw <> RESPONSE)]*

*IF employment status = Employee [WpEs = 1]*

### WPBPS

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 2 No

**[This variable is recoded as WPBPSP]**

*IF current employer pension scheme = yes [WpBPS = 1]*

#### **WPPS**

Are you a member of this pension scheme?

- 1 Yes
- 2 No

**[This variable is recoded as WPPSPC]**

END FILTER

END FILTER

*IF current employer pension scheme <> yes OR current employer pension scheme membership <> yes  
[(WpBPS <> Yes) OR (WpPS <> Yes)]*

#### **WPMORE**

Apart from state pensions, do you have any pension schemes that you belong to now, or you had in the past?

Please include schemes which you are currently receiving an income from and include any to which a former spouse/partner contributed.

- 1 Yes
- 2 No

**[This variable is recoded as WPMORP]**

END FILTER

END FILTER

**[The following set of questions relate to private pensions. These variables are saved in the separate pension-level dataset]**

**LOOP for each pension mentioned in previous interview and any additional pensions indicated at WPMORE WPMOREPC WPPS WPPSPC**

*IF pension indicator =mentioned at previous interview [PPRevNew = Prev]*

#### **WPPREV**

Last time you were interviewed, in [^date of last interview], you told us about [^an employer pension/a private personal pension/a group personal pension/a stakeholder pension/a retirement annuity pension/an S226 plan/another retirement saving scheme] called [^pension name] [^which you had stopped contributing to/which you were receiving an income from].

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No
- 3 Not read out as didn't make sense

END FILTER

*IF pension not mentioned at last interview AND NOT pension mentioned at WpPs or WpPSPC*

**WPENT**

What type of pension is this?

- 1 Employer Pension
- 2 Private Personal Pension
- 3 Group Personal Pension
- 4 Stakeholder Pension
- 5 S226 Plan
- 6 Retirement Annuity pensions (pre 86 PPPs)
- 7 Self-Invested Personal Pension (SIPP)
- 8 National Employee Savings Trust (NEST)
- 95 Other retirement saving scheme

END FILTER

*IF (pension(s) mentioned at last interview = yes OR pension indicator = new)  
[(WpPrev = 1) OR (PPrevNew = 'New')]*

*IF (pension(s) mentioned at last interview = yes AND name of pension mentioned at last interview = RESPONSE)*

*[(WpPrev = Yes) AND (WpFFName (Last int) = RESPONSE)]*

**WPNAMEC**

Can I just check has this employer pension/ private personal pension/group personal pension/stakeholder pension/an S226 Plan/retirement annuity pension (pre 86 PPPs)/ self-invested personal pension (SIPP)/National Employment Savings Trust (or NEST) account/retirement saving scheme/pension] ^[which you had stopped contributing to / which you were receiving an income from] changed its name?

INTERVIEWER: Only code yes if the pension really is the same scheme, as opposed to being a different scheme.

01 Yes

02 No

END FILTER

*IF name of pension mentioned at last interview <> no AND pension mentioned at last interview <> RESPONSE*

*[(WpFFName (Last int) <> RESPONSE) AND (WpNameC <> No)]*

**WPNAME @**

Can I just check, what is the name of this pension scheme?

String: 80

END FILTER

END FILTER

*IF Current or past pension = Current OR Current or past pension <> RESPONSE OR Pension indicator = New*

*[(WpFFCurP (Last int) = 1) OR (WpFFCurP (Last int) <> RESPONSE) OR (PPrevNew = 'New')]*

*IF (number of current pensions >1 AND pension scheme membership = yes) OR (number of current pensions = 1 Number of pensions fed foward = 0 AND membership of pension scheme = yes)  
[((INP > 1) AND (WpPSPC = 1)) OR ((INP = 1) AND (NPffW = 0) AND (WpPS = 1))]*

**WPCURR**

[^Do you currently contribute to this pension/Do you or your employer currently contribute to this pension/Are you currently contributing or could you still contribute to this pension?]

- 1 Yes
- 2 No

END FILTER

*IF currently contributing = No and pension indicator = pension mentioned at last interview  
[(WpCurr = 2) AND (PPRevNew = 'Prev')]*

**WPLFTPS @**

Why are you no longer a member of this pension scheme?

CODE ALL THAT APPLY.

*[The names in brackets denote the binary variable in the dataset recording responses to that code]*

- 01 I changed employer [wplftpch]
- 02 Employer no longer offers pension scheme [wplftpof]
- 03 No longer eligible to be a member of pension scheme [wplftpe]
- 04 Left as could not afford payments [wplftpaf]
- 05 Retired [wplftppt]
- 06 Started receiving pension [wplftppe]
- 95 Other reason [wplftp95]

[code maximum 7 out of 7 possible responses]

***IMulitple responses to WPLFTPS recoded as WPLFTPCH WPLFTPOF WPLFTPEL  
WPLFTPAF WPLFTPRT WPLFTPRE WPLFTP95]***

END FILTER

END FILTER

*IF currently contributing <> yes OR Current or past pension at last interview = RESPONSE AND Current or past pension at last interview= Current AND NOT ((number of current pensions >1 AND pension scheme membership = yes) OR (number of current pensions = 1 Number of pensions fed forward = 0 AND membership of pension scheme = yes))*

*[(WpCurr <> Yes) OR ((WpFFCurP (last int) = RESPONSE) AND (WpFFCurP <> Current))  
AND NOT((INP > 1 AND QPension[INP-1].WpPSpc = 1) OR (INP = 1 AND NPffW = 0 AND WpPS = 1))]*

**WPREC**

Are you [^still] receiving a pension from this scheme?

- 1 Yes
- 2 No

*IF current pension receipt = no [WpRec = 2]*

**WPRGHX**

Have you ... READ OUT ...

- 1 ...retained pension rights in this scheme,
- 2 transferred rights from this scheme into another scheme,
- 3 or, received a lump sum refund of contributions?
- 4 [SPONTANEOUS: Has stopped receiving pension from this scheme]

*IF retained pension rights [WpRghX = 1]*

**WPPAM**

How much do you expect to get from this pension when you retire?

IF ASKED: In today's prices.

INTERVIEWER: Code type of answer given."

1 Total amount of pension

2 Annual Amount

3 Don't know

*IF amount expected from pension = total amount, annual amount [(WpPAm =1,2)]*

**WPPA**

INTERVIEWER: Enter amount.

Range : 0..9999997

END OF FILTER

*IF amount expected from pension = total amount AND amount given <>RESPONSE  
[(WpPAm = Total) AND (WpPA <> RESPONSE)]*

**WPTB@**

Would it be.....

BRACKETS (5000, 15000, 50000, 100000)

**[Bracket results are recoded in WPPATL WPPATU WPPATE WPPATR]**

END OF FILTER

*IF ((amount expected from pension = DK, RF)) OR ((amount expected from pension = Annual)) AND (amount given = <> RESPONSE))*

*[((WpPAm = DK) OR (WpPAm = RF)) OR ((WpPAm = Annual) AND (WpPA <>RESPONSE)) ]*

**WPAB@**

Would it be.....

BRACKETS (2500, 5000, 12500, 50000)

**[Bracket results are recoded in WPPAAL WPPAAU WPPAAE WPPAAR]**

END OF FILTER

END OF FILTER

END FILTER

END FILTER

*IF ((pension indicator = pension mentioned at previous interview) AND (pension type = employer pension)) AND (past or current pension = current)*

*[((PrevNew = 'Prev') AND (WpFFPenT = 1)) AND (WpCurp = 2)]*

**WPSRUL**

Have any of the pension scheme rules changed since we last interviewed you?

1 Yes

2 No

3 AFTER CAPI PROMPT: Yes, scheme rules have changed

END FILTER

*IF ((Pension type = employer pension) OR (pension type = DK, RF) AND (Currently contributing to pension = yes) AND (pension indicator = new)) OR ((defined benefit or defined contribution <> RESPONSE) AND (past or current pension = current) AND (pension type = employer pension OR pension type = DK, RF)) OR (pension scheme rules = yes, yes prompted)*  
[ ((WpPenT = 1) OR (WpPenT = DK) OR (WpPenT = RF)) AND (WpCurr = 1) AND (PrevNew = 'New'))  
OR ((WpFFDCDB (Last int)<> RESPONSE) AND (WPCurP = 2) AND ((WpPenT = 1) OR (WpPenT = DK) OR (WpPenT = RF))) OR (WpsRul = 1,3)]

#### **WPDPS**

SHOW CARD E10

Is your pension scheme more like Type A or Type B?

INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

If respondent says NEST (National Employee Savings Trust), code as (1) Type A.

- 1 Type A: My pension contributions are put into a fund which grows over time and my pension will depend on the size of this fund when I retire
- 2 Type B: My pension will be based on a formula involving age, years of service and salary
- 3 Don't know

END FILTER

*IF currently contributing to pension = yes AND ((pension scheme rules = yes, yes prompted) OR ((pension type = employer pension) AND (pension indicator = new pension OR defined benefit or defined contribution <> RESPONSE))) OR (pension type = employer pension) AND (past or current pension = current)*

[IF WpCurr = 1 AND ((Wpsrul = 1 OR (WpPenT = 1 AND (PrevNew = 2 OR WpFFDCDB <> RESPONSE))) OR (WpPenT <> 1 AND WpCurp = 2))]

#### **WPCOS**

Is it a contracted out scheme (this means you pay lower National Insurance Contributions and give up your entitlement to the State Second Pension scheme)?

- 1 Yes
- 2 No
- 3 Don't know

END FILTER

*IF((pension indicator = new pension) AND (pension type = employer pension) AND (past or current = current)) OR (pension scheme rules = yes, yes prompted) OR ((past or current = current) AND (pension type = 1) AND (defined benefit or defined contribution at last interview <> RESPONSE))*

[((PrevNew = 2 AND WpPenT = 1 AND WpCurp = 2) OR (Wpsrul = 1, 3))  
OR ((WpCurp = 2) AND WpPenT = 1 AND (Wpffdcdb (Last int)<> RESPONSE))]

#### **WPNRA**

Is there a Normal Retirement Age in your pension scheme or period of service after which members can retire?

- 1 Yes - normal retirement age
- 2 Yes - period of service
- 3 Yes - both / either
- 4 No - neither
- 5 Don't know

*IF normal retirement age = yes – normal retirement age, yes- both [WpNra = 1,3]*

**WPBTHA**

What is the normal retirement age?

Range: 0..120

END FILTER

*IF normal retirement age = yes – period of service, yes- both [WpNra = 2,3]*

**WPBTHP**

What is the period of service?

Range: 0..120

END FILTER

*IF normal retirement age = yes – normal retirement age, yes- both [WpNra = 1,3]*

**WPERA**

Does your scheme have an earlier age at which you can retire and draw pension benefits?

- 1 Yes
- 2 No
- 3 Occasionally

END FILTER

*IF early retirement option = yes, occasionally OR normal retirement age = period of service, no, DK [(WpEra = 1, 3) OR (WpNra = 2, 4, 5)]*

**WPYAER**

What currently is the youngest age at which you could take early retirement?

Range: 0..120

END FILTER

*IF defined benefit or defined contribution = defined benefit [WpDCDB = 1]*

**WPDESP**

SHOW CARD E11

Which of these best describes how your pension will be calculated?

CODE ONE ONLY.

- 1 Some fraction of my final year's salary
- 2 Some fraction of my salary from all years when I have been in the scheme
- 3 Some fraction of my last five years' salary
- 4 In some other way
- 5 Don't know

*IF pension calculation = some other way [WpDesP = 4]*

**WPODP @**

INTERVIEWER: Write in other way.

String: 70

END FILTER

*IF pension calculation <> DK [WpDesP <> 5]*

**WPFSAP**

What fraction will be added to your final pension for each year's service?

- 1 1/60
- 2 1/80
- 3 Other
- 4 Don't know

*IF pension fraction = other [WpFsap = 3]*

**WPFSAL @**

INTERVIEWER: Enter other fraction.

String: 10

END FILTER

END FILTER

END FILTER

END FILTER

*IF ((pension indicator = new OR Pension scheme rules = yes, yes prompted OR defined benefit or defined contribution at last interview <> RESPONSE) AND defined benefit or defined contribution = defined benefit)*

*[(PrevNew = 2 OR Wpsrul = 1,3 OR WpFFDCDB (Last int) <> RESPONSE) AND WpDCDB =1]*

**WPPLP**

All pensions go up with prices after retirement (sometimes known as index-linked), but some may go up more than prices. Will your pension go up more than prices after retirement?

- 1 Yes
- 2 No
- 3 Don't know

*IF pension rise = yes [WpPlp = 1]*

**WPPLPH**

Will this be ... READ OUT ...

- 1 ... automatic,
- 2 or, at your employer's (scheme's) discretion?
- 3 Other
- 4 Don't know

END FILTER

END FILTER

*IF defined benefit or defined contribution = defined benefit [WpDCDB = 1]*

**WPLUMP**

What size lump sum do you expect to receive when you retire?

Range: 0..9999997

*IF lump sum amount = DK, RF [(WpLump = DK) OR (WpLump = RF)]*

**WPLUMPB @**

Would it be.....

BRACKETS (5000, 15000, 50000, 200000)

**[Bracket results are recoded in WPLUMPL WPLUMPU WPLUMPE WPLUMPR]**

END FILTER

**WPPTP**

How much do you expect to get from this pension when you retire?

INTERVIEWER: If asked: in today's prices.

Code how answer is given.

- 1 Income as a percentage of salary
- 2 Income as an annual amount of money

*IF income from pension =percentage of salary [WpPTP = 1]*

**WPPSAL**

INTERVIEWER: Enter percentage of salary.

Range: 1..100

END FILTER

*IF income from pension = annual amount of money [WpPTP = 2]*

**WPASAL**

INTERVIEWER: Enter amount.

Range: 0..999997

END FILTER

*IF annual amount = NONRESPONSE OR income from pension = NONRESPONSE*

*[WpAsal = NONRESPONSE OR WpPTP = NONRESPONSE]*

**WPASALB**

Would it be.....

BRACKETS (2500, 5000, 12500, 50000)

**[Bracket results are recoded in WPASALL WPASALU WPASALE WPASALR]**

END FILTER

END FILTER

*IF (pension scheme rules = yes, yes prompted) OR ((pension indicator = new pension AND past or current = current)) OR (past or current = current)*

*[ (Wpsrul = 1,3) OR ((PrevNew = 2 AND WpCurP = 2) OR (WpCurP = 2))]*

**WPYBS**

How many years have you had this pension?

Range: 0..60

END FILTER

*IF pension type = employer pension AND past or current pension = current AND employment status = employee AND derived activity status = paid work, temporarily away from paid work, waiting to start paid work already accepted)*

*[(WpPenT = 1) AND (WpCurP = 2) AND (WpES = Employee) AND (Wpactw = 1,2,3)]*

**WPERC**

Does your employer require you to make a contribution to your pension scheme?

- 1 Yes
- 2 No
- 3 Don't know

*IF compulsory contribution = yes [WpErc = 1]*

**WPMC**

What is the minimum contribution you need to make?

INTERVIEWER: Code how answer is given.

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*IF minimum contribution = amount [WpMc = 1]*

**WPMCA**

INTERVIEWER: Enter amount.

Range: 0..9997

**WPPIERC**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

*IF minimum contribution = percentage of salary [WpMc = 2]*

**WPMFRAC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

*IF defined benefit or defined contribution = defined benefit [WpDCDB = 2]*

**WPACON**

Do you make any additional contributions to your pension scheme through ...  
READ OUT ...

- 1 ... Additional Voluntary Contributions - AVCs,
- 2 buying Added Years,
- 3 or Irregular contributions?
- 4 No
- 5 Don't know

*IF type of additional contributions = buying Added Years [WpAcon = 2]*

**WPADY**

How many added years did you get in the last 12 months?  
Range: 0..10

END FILTER

END FILTER

*IF defined benefit or defined contribution = defined contribution [WpDCDB = 1]*

**WPMMIN**

Do you usually contribute more than the minimum contribution?

- 1 Yes
- 2 No

END FILTER

*IF type of additional contributions = AVCs OR contribute more than minimum = yes  
[WpAcon = 1 OR WpMMin = 1]*

**WPACOA**

How much [^do you usually contribute through AVCs/are your usual additional contributions?]

INTERVIEWER: Code how answer is given.

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*IF additional contribution = amount [WpAcoA = 1]*

**WPACOB**

INTERVIEWER: Enter amount.

Range: 0..99997

**WPACOC**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month

- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

*IF additional contribution = percentage of salary [WpAcoA = 2]*

#### **WPFRAS**

INTERVIEWER: Enter percentage of salary.  
Range: 0..100

END FILTER

END FILTER

*IF type of additional contributions = irregular contributions [WpAcon = 3]*

#### **WPCONY**

How much did you contribute in the last 12 months through additional irregular contributions?  
INTERVIEWER: Enter amount.  
Range: 0..99997

END FILTER

END FILTER

END FILTER

*IF WpErc = No, DK, NONRESPONSE OR (WpPENT = Private Personal Pension, Group Personal Pension, Stakeholder Pension, S226 Plan, Retirement Annuity pensions (pre 86 PPPs), Other retirement saving scheme) AND (past or current pension =current) OR ((pension type = employer pension and past or current pension = current AND wpES<> employee)) OR ((pension type = employer pension and past or current pension = current AND wpES= employee AND derived activity status <> paid work, temporarily away from paid work, waiting to start work already accepted))  
[(WpErc = 2, 3, NONRESPONSE) OR ((WpPenT = 2, 3, 4, 5, 6, 95) AND (WpCurP = Current))  
OR ((WpPenT = 1) AND (WpCurP = 2) AND (WpES <> 1)) OR ((WpPenT = 1) AND (WpCurP = 2) AND (WpES = Employee) AND (Wpactw <> 1,2,3))]*

#### **WPPCONT@ [named WPPCON in data]**

Not including any National Insurance Contributions paid into the pension, do you contribute to your pension ... READ OUT ...

- 1 ... never,
- 2 regularly,
- 3 irregularly,
- 4 or, have you stopped contributing to your scheme?

*IF contribution regularity = regularly [WpPCont = 2]*

**WPYCAMS@** [named **WPYCATE** in data]

How much do you currently contribute to your pension scheme?

INTERVIEWER: Code how answer is given.

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*IF type of contribution = amount [WpYcAmt = 1]*

**WPYCA**

INTERVIEWER: Enter amount.

Range: 0..99997

**WPMCAF**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

*IF type of contribution = percentage of salary [WpYcAmt = 2]*

**WPYFRAC@** [named **WPYFRA** in data]

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

END FILTER

*IF contribution regularity = irregularly, stopped contributing [WpPCont = 3, 4]*

**WPLCOY**

When did you last make a contribution?

INTERVIEWER: Enter year at this question.

Range: 1900..2050

*IF year last contributed to pension = RESPONSE and year last contributed >= year of last interview*

*[(WpLcoY = RESPONSE) AND (WpLcoY >= year of last interview)]*

**WPLCOM**

(When did you last make a contribution?)

INTERVIEWER: Code month at this question. If the respondent doesn't know month, code season.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

END FILTER

*/F year last contributed to pension >= 2005 [WpLcoY >= 2005]*

**WPNIRR**

About how many times in the last year did you contribute to your pension?

Range: 0..60

END FILTER

**WPMCON**

About how much did you contribute [^on that occasion/in the last 12 months]?

INTERVIEWER: Code how answer is given.

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*/F type of contribution = amount [WpMcon = 1]*

**WPAC**

INTERVIEWER: Enter amount.

Range: 0..99997

END FILTER

*/F type of contribution = percentage of salary [WpMcon = 2]*

**WPFSC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

END FILTER

*IF contribution regularity = stopped contributing [WpPCont = 4]*

**WPRCON**

Did you previously contribute regularly to this pension?

- 1 Yes
- 2 No

*IF previous contribution pattern = yes [ WpRcon =1]*

**WPRSC**

Why did you stop contributing to this Personal Pension?

CODE ALL THAT APPLY.

*[The names in brackets denote the binary variable in the dataset recording responses to that code]*

- 1 Moved job and joined employer's pension scheme [wprcmo]
- 2 Rejoined employer's pension scheme in existing job [wprcre]
- 3 Rejoined State Earnings Related Pension Scheme [wprcst]
- 4 Worried about risks [wprcri]
- 5 Worried about publicity concerning personal pensions [wprcpu]
- 95 Other (specify) [wprc95]

**[Multiple responses to WPRSC in variables WPRCMO WPRCRE WPRCST WPRCRI WPRCPU WPRC95]**

*IF reason stopped contributing = other [Wprsc = 95]*

**WPRSCO @**

INTERVIEWER: Enter other reason.

String: 20

**[Open responses to WPRSCO are coded and merged with the multiple responses to WPRSC in variable WPRCMMO – WPRCM86]**

**WPRM**

- 1 Moved job and joined employer's pension scheme [wprcmmo]
- 2 Rejoined employer's pension scheme in existing job [wprcmre]
- 3 Rejoined State Earnings Related Pension Scheme [wprcmst]
- 4 Worried about risks [wprcmri]
- 5 Worried about publicity concerning personal pensions [wprcmfu]
- 6 Because of own illness/disability [wprcmoh]
- 7 Stopped work/unemployed [wprcmun]
- 8 Could not afford it [wprcmaf]
- 9 Changed jobs and not known whether joined new scheme [wprcmnk]
- 85 Other response (not codeable 1-9) [wprcm85]
- 86 Irrelevant response [wprcm86]

END FILTER

END FILTER

END FILTER

END FILTER

*MT: condition added*

*IF pension type <> S226P AND WpEs = employee AND past or current pension = current AND derived activity status = paid work, temporarily away from paid work, waiting to start paid work  
[(WpPenT <>5) AND (WpEs = 1) AND (WpCurp = 2) AND (Wpactw =1,2,3)]*

### **WPCEMP**

Does your employer contribute to this pension?

- 1 Yes - regularly
- 2 Yes - irregularly
- 3 No

*IF whether employer contributes to pension = yes, irregularly [WpCemp = 2]*

### **WPECPP**

How much was the last contribution that your employer made to your Personal Pension?

- 1 Amount
- 2 Percentage of salary

*IF type of contribution = amount [WpECPP = 1]*

### **WPAECP**

INTERVIEWER: Enter amount.

Range: 0..99997

*IF contribution amount = RESPONSE [WpAECP = RESPONSE]*

### **WPEPERI** [named wpeperi in the data]

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

END FILTER

*IF type of contribution = percentage of salary [WpECPP = 2]*

**WPFSEC**

INTERVIEWER: Enter percentage of salary.  
Range: 0..100

END FILTER

END FILTER

*IF whether employer contributes to pension = yes, regularly [WpCemp = 1]*

**WPMEC**

How much does your employer usually contribute?

- 1 Amount
- 2 Percentage of salary
- 3 Percentage of contribution
- 4 Don't know

*IF type of contribution = amount [WpMEC = 1]*

**WPAMEC**

INTERVIEWER: Enter amount.  
Range: 0..99997

*IF contribution amount = RESPONSE [WpAMEC = RESPONSE]*

**WPFSCP**

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

END FILTER

*IF contribution type = percentage of salary, percentage of contribution [WpMEC = 2, 3]*

**WPFSCO**

INTERVIEWER: Enter percentage of salary or contribution.  
Range: 0..100

END FILTER

END FILTER  
END FILTER

*IF defined benefit or defined contribution = defined benefit AND past or current pension = current  
[(WpDCDB =2) AND (WpCurp = 2)]*

**WPFSAV**

Do you make any Free Standing Additional Voluntary Contributions (FSAVC'S)?

- 1 Yes
- 2 No

*IF FSAVC = yes [WpFSav = 1]*

**WPPFVAL** [named WPPFVA in the data]

What is the value of your accumulated contributions at this point?

Range: 0..9999997

*IF value of accumulated contributions = DK, RF [WpPFVal = DK OR WpPFVal = RF]*

**WPPFVALB@**

Would it amount to.....

BRACKETS (2500, 7500, 25000, 100000)

**[Bracket results are recoded in WPPFVL WPPFVU WPPFVE WPPFVR]**

END FILTER  
END FILTER  
END FILTER

*IF currently contributing = yes AND ((pension type = employer pension and defined benefit or defined contribution = defined contribution) OR (pension type = Private Personal Pension, Group Personal Pension, Stakeholder Pension, S226 Plan, Retirement Annuity pensions (pre 86 PPPs), Other retirement saving scheme AND past or current pension = current)  
[WpCurr = Yes AND ((WpPenT = EmpIPS AND WpDCDB = DC) OR ((WpPenT = 2, 3, 4, 5, 6, 95) AND WpCurp = Current)])*

**WPAPF**

What is the value of the accumulated pension fund at this point?

Range: 0..9999997

*IF value of accumulated pension fund = DK, RF [(WpAPF = DK) OR (WpAPF = RF)]*

**WPAPFB@**

Is it.....

BRACKETS (2500, 7500, 25000, 100000)

**[Bracket results are recoded in WPAPFL WPAPFU WPAPFE WPAPFR]**

END FILTER

**WPPTOP**

How much do you expect the pension to be worth when you retire?

INTERVIEWER: If asked: in today's prices.

Code how answer is given.

- 1 Total amount of pension
- 2 Annual Amount
- 3 Don't know

*IF pension value = total amount, annual amount [WpPtoP = 1, 2]*

**WPPENB**

INTERVIEWER: Enter amount.

Range: 0..9999997

*IF pension amount = DK, RF (WpPenB = DK) OR (WpPenB = RF)*

*IF pension value = total amount [WpPtoP = 1]*

**WPENTB@**

Would it be.....

BRACKETS (5000, 15000, 50000, 150000)

**[Bracket results are recoded in WPPENTL WPPENTU WPPENTE WPPENTR]**

END FILTER

*IF pension value = annual amount [WpPtoP = 2]*

**WPENAB@**

Would it be.....

BRACKETS (2500, 5000, 12500, 50000)

**[Bracket results are recoded in WPPENAL WPPENAU WPPENAE WPPENAR]**

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**WPCONS WPEADD– removed at wave 4**

*IF (pension type = employer pension, DK, RF) AND (PrevNew = New AND past or current pension = past) OR (past or current pension = past AND defined benefit or defined contribution at last interview <> RESPONSE)*

*[ (WpPenT = 1, DK, RF) AND (PrevNew = 1 AND WpCurP = 1) OR (WpCurP = 1 AND WpFFDCDB(Last int) <> RESPONSE) ]*

**WPDPS**

SHOW CARD E10

Is your pension scheme more like Type A or Type B?

INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

If respondent says NEST (National Employee Savings Trust), code as (1) Type A.

- 1 Type A: My pension contributions were put into a fund which grew over time and the pension depended on the size of this fund when I retired
- 2 Type B: My pension is based on a formula involving age, years of service and salary
- 3 Don't know

**WPERCP**

Did your employer require you to make a contribution to your pension scheme?

- 1 Yes
- 2 No
- 3 Don't know

END FILTER

*IF past or current pension = past [WpCurp = 1]*

*IF pension indicator = new AND current pension receipt = no [PrevNew = 1 AND WpRec = 2]*

**WPDS**

Between what dates (approximately) did you belong to this scheme?

INTERVIEWER: Enter year started.

Range: 1900..2050

**WPDE**

(Between what dates (approximately) did you belong to this scheme?)

INTERVIEWER: Enter year stopped.

Range: 1900..2050

END FILTER

*IF current pension receipt = yes [WpRec = 1]*

**WPINF**

Is the amount you receive from this pension continually adjusted to take account of inflation (sometimes called index-linked)?

- 1 Yes
- 2 No

**WPPAY**

Thinking about the last payment you received, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum

96 None of these (EXPLAIN IN A NOTE)

*IF period of last payment = RESPONSE [WpPay = RESPONSE]*

**WPPYR**

How much did you receive?

Range: 0..999997

*IF amount received <> RESPONSE [WpPyR <> RESPONSE]*

*IF period of last payment = one week [WpPay = 1]*

**WPWB@**

Was it.....

BRACKETS (25, 75, 150, 600)

**[Bracket results are recoded in WPPYRWL WPPYRWU WPPYRWE WPPYRWR]**

END FILTER

*IF period of last payment = two weeks [WpPay = 2]*

**WPFB@**

Was it.....

BRACKETS (50, 150, 300, 1200)

**[Bracket results are recoded in WPPYRFL WPPYRFU WPPYRFE WPPYFR]**

END FILTER

*IF period of last payment = four weeks, calendar month [WpPay = 4, 5]*

**WPMB@**

Was it.....

BRACKETS (100, 300, 600, 2500)

**[Bracket results are recoded in WPPYRML WPPYRMU WPPYRME WPPYRMR]**

END FILTER

*IF period of last payment = yearly, one off [WpPay = 52, 95]*

**WPYB@**

Was it.....

BRACKETS (1500, 4000, 8000, 30000)

**[Bracket results are recoded in WPPYRYL WPPYRYU WPPYRYE WPPYRYR]**

END FILTER

*IF period of last payment <> one week, two weeks, four weeks, calendar month, yearly, one off [WpPay <> 1, 2, 4, 5, 52, 95]*

**WPOB@**

Was it.....

BRACKETS (100, 300, 600, 2500)

**[Bracket results are recoded in WPPYROL WPPYROU WPPYROE WPPYROR]**

END FILTER  
END FILTER  
END FILTER

### **WPTAX**

Is this before or after tax?

- 1 Before tax
- 2 After tax
- 3 (SPONTANEOUS: Not liable for tax)

*IF WpEs = Employee AND pension type = employer pension AND derived activity status = paid work, temporarily away from paid work and waiting to take up work already accepted)  
[WpEs = 1 AND WpPenT = 1 AND Wpactw = 1,2,3]*

### **WPNEW**

Changes introduced in April 2006 mean that it is now possible to be paid a pension by an employer whilst you continue to work for them. Is this pension that you are currently receiving paid for you by your current employer?

- 1 Yes
- 2 No
- 3 Don't know

END FILTER

END FILTER

*IF current pension receipt = yes AND current or past pension at last interview <> past OR pension receipt at last interview <> receiving)  
[(WpRec = 1 AND (WpFFCurP (Last int) <> 1 OR WpFFRecP(Last int) <> 1))]*

### **WPLUMPS** [named **WPLUMS** in the data]

Many pensions allow you to take a lump sum in addition to your pension income.  
Have you received a lump sum from this scheme?

- 1 Yes
- 2 No

*IF lump sum = yes [WPLumpS = 1]*

### **WPLUMPA** [named **WPLUMA** in the data]

How much was the lump sum?  
INTERVIEWER: Enter pounds.  
Range: 1..999997

*IF lump sum amount = RESPONSE [WPLumpA = NONRESPONSE]*

### **WPLMPAB@**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

**[Bracket results are recoded in WPLUAL WPLUAU WPLUAE WPLUAR]**

END FILTER

END FILTER

**WPTAKEP** [named **WPTAKP** in the data]

Have you taken your pension as ... READ OUT ...

- 1 ... Annuity with pension company who originally provided the scheme,
- 2 ... Annuity with a different pension provider,
- 3 or, Income drawdown?

*IF type of pension receipt = income drawdown [WPTakeP = 3]*

**WPINCD**

How much have you withdrawn annually from your pension?

INTERVIEWER: Enter pounds.

Range: 0..99997

*IF amount annually withdrawn from pension = NONRESPONSE [WpIncd =NONRESPONSE]*

**WPINCDUN@**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

**[Bracket results are recoded in WPINCDL WPINCDU WPINCDE WPINCDR]**

END FILTER

END FILTER

END FILTER

END FILTER

**WPINFS**

From whom do you normally get information on how this pension scheme operates, for example, the benefits that you can expect to receive?

PROBE: Who else?

CODE ALL THAT APPLY

*[The names in brackets denote the binary variable in the dataset recording responses to that code]*

- 1 No information [wpifsno]
- 2 Employer [wpifsem]
- 3 Pension scheme reports [wpifsre]
- 4 Work-mates [wpifsc]
- 5 Financial press [wpifspr]
- 6 Accountant [wpifsac]
- 7 Independent financial adviser [wpifsfa]
- 8 Insurance or Pension representative [wpifsrp]
- 95 Other [wpifs95]

**[Multiple responses to WPINFS are recoded in variable WPIFSNO WPIFSEM WPIFSRE WPIFSCO WPIFSPR WPIFSAC WPIFSFA WPIFSRP WPIFS95]**

*IF pension information <> no information [WpInfS <> NoInfo]*

**WPFINFO** [named **WPFINFin** dataset]

Do you feel that you have received enough information about your expected

pension at retirement?

- 1 Yes
- 2 No

END FILTER

*IF INP >= NPffw*

*IF whether current employer runs a pension scheme that the respondent is eligible to join = EMPTY AND employment status = Employee AND derived activity status = paid work, temporarily away from paid work, waiting to start paid work already accepted AND number of pensions fed forward NPffw > 0  
[(WpBPStmp = EMPTY) AND (WpES = Employee) AND (Wpactw = 1,2,3) AND (NPffw > 0)]*

**WPBPSPC** [named WPBPS in the data]

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 2 No

*IF whether current employer offers pension scheme = yes [WpBPSPC = 1]*

**WPPSPC**

Are you a member of this pension scheme?

- 1 Yes
- 2 No

END FILTER

END FILTER

*IF membership of current employer pension scheme <> yes [WpPSPC <> 1]*

**WPMOREPC** [named wpmorp in the data]

So far you have told us about [^list pensions already mentioned].

Apart from state pensions, do you have any other pension schemes that you belong to now, or you had in the past?

Please include schemes which you are currently receiving an income from.

- 1 Yes
- 2 No

END FILTER

END FILTER

*IF (INP < NPffw OR Wppspc = 1 OR Wpmorepc = 1) repeat questions WPPENT to WPMOREPC for next pension.*

**[The remaining questions in this module are available in the main individual-level core dataset]**

*IF employment status = Employee AND derived activity status = paid work, temporarily looking for paid work, waiting to start paid work already accepted  
[(WpEs = 1) AND (Wpactw = 1,2,3)]*

*IF whether current employer offers pension scheme = no [WpBps= 2]*

**WPANYP**

You said that your employer did not offer you a pension scheme. Does your employer offer a pension scheme to any employees?

- 1 Yes
- 2 No

END FILTER

*/F scheme member = no [WpPS = 2]*

**WPPSM @**

You said that you were not a member of the pension scheme your employer offers. Why aren't you a member of this scheme?

PROBE: What else?

CODE ALL THAT APPLY.

- 1 Preferred, or already had, other arrangement
- 2 Expected to move job
- 3 Could not afford payments
- 4 Not eligible to join
- 95 Other reason (SPECIFY)

[code maximum 5 out of 5 possible responses]

***[Multiple Responses to WPPSM are recoded in variables: WPPSOT WPPSEX  
WPPSAF WPPSEL WPPS95]***

*/F reason not a member of pension scheme = other [Wppsm = 95]*

**WPPSMO @**

INTERVIEWER : Write in other answer.

String: 40

***[Responses to WPPSMO are combined with multiple responses to WPPSM  
and recoded in binary variables: WPPSMOT WPPSMEX WPPSMAF WPPSMEL  
WPPSM85 WPPSM86]***

**WPPMM@**

- 1 Preferred, or already had, other arrangement
- 2 Expected to move job
- 3 Could not afford payments
- 4 Not eligible to join
- 5 Already have another pension
- 6 Age means it's too late now/too old so not worth it
- 7 Only work reduced hours/part time so not worth it
- 8 Did not like/understand scheme offered
- 85 Other response (not codeable 1-8)
- 86 Irrelevant response

END FILTER

*/F reason not a member of the scheme <> not eligible [Wppsm <> 4]*

**WPEC**

If you joined the scheme and made contributions, would your employer add to your contributions to the pension scheme to give you a higher pension?

- 1 Yes
- 2 No
- 3 Don't know

*IF employer contributes to scheme = yes [WpEc = 1]*

**WPECA**

Would this be ...READ OUT...

- 1 ...automatic,
- 2 or, at employer's discretion?
- 3 Don't know

END FILTER

END FILTER

END FILTER

END FILTER

**WPEXW**

Some people receive pensions from schemes which their previous husband, wife or civil partner contributed to. Do you expect to receive a pension from any scheme like this in the future? Please do not include any pensions you are already receiving an income from.

- 1 Yes
- 2 No

*IF ex-partner pension scheme = yes [WpExW = Yes]*

**WPSPOUP**

How much do you expect to receive from schemes like this in the future?

INTERVIEWER: Ask for period covered and then the amount.

Period covered

- 1 Weekly
- 2 Monthly
- 3 Yearly

*IF scheme period = RESPONSE [WpSpouP = RESPONSE]*

**WPSPOU**

How much do you expect to receive from schemes like this in the future?

Enter amount

Range: 0..999997

END FILTER

END FILTER

End of pension grid

*IF number of non-receiving pensions > 0 [WpRPens > 0]*

**MANINT @**

There may be a lot of uncertainty about how much income you will receive

from your pension in the future, for example because of changes made by your pension provider or changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

INTERVIEWER: Press <1> and <Enter> to continue.

#### **WPMPAH**

If you added together your expected income from any occupational or personal pensions, but not your state pension, what is the most income you could expect to receive at state pension age in the best case scenario? If unsure, please think of a yearly figure.

INTERVIEWER: Enter amount at this question, period at the next.

Round to the nearest £.

Range: 0..999997

#### **WPMANPP**

INTERVIEWER: Code period at this question.

- 01 One week
- 02 Two Weeks
- 03 Three Weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three Months
- 26 Six Months
- 52 One year
- 90 Less than a week
- 95 One off/lump sum
- 96 Other (EXPLAIN IN A NOTE)

#### **WPMALA**

If you added together your expected income from any occupational or personal pensions, but not your state pension, what is the least income you could expect to receive at state pension age in the worst case scenario?

INTERVIEWER: Enter amount.

Round to the nearest £.

If the respondent is sure about their future pension payment, enter the same amount again.

Range: 0..999997

*[n.b. the textfill wp1q is randomly selected, and wp2q and wp3q go up in value. The period (per week, month etc) matches the period that the respondent chose to describe their total pension value in wpmanpp]*

*IF expected pension income range (WpMpah-WpMaA) split into at least 2 ranges  
[WpQn >= 2]*

#### **WPMFQ**

SHOW CARD E7

What are the chances that you will receive more than £[^ amount] per [^week/four weeks/month/year]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

*IF expected pension income range (WpMpah-WpMaA) split into at least 3 ranges [WpQn >= 3]*

**WPMSQ**

SHOW CARD E7

What are the chances that you will receive more than £[^ amount] per [^week/four weeks/month/year]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

*IF expected pension income range (WpMpah-WpMaA) split into 4 ranges [WpQn >= 4]*

**WPMTQ**

SHOW CARD E7

What are the chances that you will receive more than £[^amount] per [^week/four weeks/month/year]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

END FILTER

**WPSPINT @**

There may also be a lot of uncertainty about how much income you will receive from state pensions in the future, for example because of changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

INTERVIEWER: Press <1> and <Enter> to continue.

**WPMSAH**

If you added together your expected income from state pensions, including those from SERPS/State Second Pensions, what is the most income you could expect to receive at state pension age in the best case scenario?

If unsure, please think of a weekly figure.

INTERVIEWER: Enter amount at this question, period at the next.

Range: 0..999997

**WPMANSP**

INTERVIEWER: Enter period at this question.

- 01 One week
- 02 Two Weeks
- 03 Three Weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months
- 26 Six months
- 52 One year
- 90 Less than a week
- 95 One off/lump sum
- 96 Other (EXPLAIN IN A NOTE)

### **WPM SH**

If you added together your expected income from state pensions, including those from SERPS/State Second Pensions, what is the least income you could expect to receive at state pension age in the worst case scenario?

INTERVIEWER: Enter amount.

If the respondent is sure about their future pension payment, enter the same amount again.

Range: 0..999997

*[n.b. the textfill wp1sq is randomly selected, and wp2sq is higher in value. The period (per week, month etc) matches the period that the respondent chose to describe their total state pension value in wpmansp]*

*IF expected pension income range (WpMsah-WpMsh) split into at least 2 ranges [Wpsn >= 2]*

### **WPMSFQ**

SHOW CARD E7

What are the chances that you will receive more than £[^amount per [^week/four weeks/month/year]]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

*IF expected pension income range (WpMsah-WpMsh) split into at least 3 ranges [Wpsn >= 3]*

### **WPMSSQ**

SHOW CARD E7

What are the chances that you will receive more than £[^ amount] per [^week/four weeks/month/year]]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

*IF expected pension income range (WpMsah-WpMsh) split into 4 ranges [Wpsn >= 4]*

**WPMSTQ**

SHOW CARD E7

What are the chances that you will receive more than £[^ amount] per [^week/four weeks/month/year]?

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

END FILTER

**WPSPD**

^[Are you/is name] currently receiving any state pension income?

- 1 Yes
- 2 No

*IF current state pension receipt = no [WPSPD = 2]*

**WPSPD1A**

Is this because...

- 1 ^[you are/he/she is] not currently entitled to receive any state pension income
- 2 ^[you are/he/she is] entitled to receive state pension income but have not claimed it yet

*IF reason not receiving state pension = not claimed [WPSPD1a = 2]*

**WPSPD1B**

Some people choose not to receive any state pension income when they first become entitled, in order that in the future they will receive either a lump sum payment or a higher weekly state pension income. This is known as state pension deferral.

^[Have you/has name] deferred ^[your/his/her] state pension?"

- 1 Yes
- 2 No

*IF state pension deferral = yes [WPSPD1b = 1]*

**WPSPD2**

Which ^[are you/is name] planning to claim in the future: a lumpsum or higher weekly income?"

- 1 Lump sum payment
- 2 Higher weekly state pension income
- 3 Have not decided yet

*IF type of state pension claim = lump sum, higher weekly state pension income [WpSPD2 =1,2]*

**WPSPD3**

At what age ^[are you/is name] planning to ^[claim/start claiming] this ^[lumpsum/higher pension scheme/lump sum or higher pension scheme]?

You can tell me either at what age ^[you are/he/she is] planning to ^[claim/start claiming] or the month and year when ^[you plan/he/she plans] to ^[claim/start claiming]

INTERVIEWER: Code how answer is given.

- 1 Age given
- 2 Month and year given

*IF age expect to claim state pension = age given [WPSPD3 = 1]*

**WPSPD3A**

INTERVIEWER: Enter age at which respondent intends to [^claim/start claiming]  
Range : 50..100

END OF FILTER

*IF age expect to claim state pension = month and year given [WPSPD3 = 2]*

**WPSPD3M**

INTERVIEWER: Enter month in which respondent intends to [^claim/start claiming]

**WPSPD3Y**

INTERVIEWER: Enter year in which respondent intends to [^claim/start claiming]  
Range : 2007..2040

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*ELSE IF current receipt of state pension = yes [WPSPD = 1]*

**WPSPD4**

When ^[you/name] reached the state pension age did ^[you/he/she]...

- 1 ...start receiving your state pension immediately
- 2 choose not to receive any state pension income initially in return for receiving a lumpsum payment or a higher weekly state pension income from the government later on (also known as State Pension Deferral),
- 3 [women only] or, did you have to wait until your husband/former husband reached state pension age before you became eligible for any state pension income?
- 4 Don't Know

*IF start of state pension claim = deferral [WPSPD4 = 2]*

**WPSPD5Y**

For how long after reaching the state pension age did ^[you/name] defer ^[your/his/her] state pension?

INTERVIEWER: Enter years.

Range : 0..45

**WPSPD5M**

For how long after reaching the state pension age did ^[you/name] defer ^[your/his/her] state pension?

INTERVIEWER: Enter months.

Range : 0..12

**WPSPD6**

When ^[you/name] did start claiming ^[your/his/her] state pension did ^[you/he/she] choose to receive...

1 Lump sum payment

2 Higher weekly state pension income  
3 Cannot remember

END OF FILTER

END OF FILTER

### **WPSPY**

Do you know at what age in years and months you will reach the State Pension Age?

INTERVIEWER: Enter number of years.

Range: 50..120

### **WPSPAM**

Do you know at what age in years and months that you will reach the State Pension age?

INTERVIEWER: Enter number of months.

Range: 0..11

### **WPSPAW**

Were you aware that the State Pension age for women is changing?

1 Yes

2 No

*IF current situation = retired, semiretired [WpDes =1, 96]*

*IF age of retirement at last interview <> RESPONSE [WpRAge (Last int) <> RESPONSE]*

### **WPRAGE**

You said earlier that you were [^retired/semi-retired]. At what age did you retire?

INTERVIEWER: Enter age here.

Range: 0..120

END FILTER

END FILTER

*IF employment status = employee AND derived activity status = paid work, temporarily away from paid work AND age >= 50*

*[(WpEs =1) AND (WPActW =1,2) AND (age>=50)]*

### **WPEARLY**

Have you been offered any form of early retirement incentives since you were 50 which you chose not to take?

1 Yes

2 No

*IF offered early retirement incentives = yes [WpEarly = 1]*

### **WPERAG**

How old were you?

INTERVIEWER: Enter age.

Range: 50..120

END FILTER

END FILTER

*IF current situation = retired, semiretired [WpDes =1, 96]*

*IF early retirement <> RESPONSE [WpEret (Last int) <> RESPONSE]*

**WPERET**

Did ^[you/he/she] take early retirement, that is did ^[you/name] retire before the normal retirement age in ^[your/his/her] pension scheme or before the compulsory retirement age in ^[your/his/her] job?

- 1 Yes
- 2 No

*IF early retirement = yes [WpERet =1]*

**WPERP**

When ^[you/name] first retired, did ^[you/he/she] retire on a ...READ OUT...

- 1 ... full pension,
- 2 reduced pension,
- 3 or, no pension?

**WPREAS @**

SHOW CARD E8

What were ^[your/name's] reasons for taking early retirement?

CODE ALL THAT APPLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these
- 97 SPONTANEOUS: Does not consider has retired early  
[code maximum 14 out of 14 possible responses]

**[Responses to WPREAS are recoded in variables WPREA9H WPRERH WPREARE  
WPREA9V WPREA9I WPREA9FA WPREAEN WPREACH WPREAST WPREADT  
WPREA9Y WPREA95 WPREA96 WPREA9O]**

*IF reason for taking early retirement = other [WpReas = 95]*

**WPOREA @**

INTERVIEWER: Write in other reason.

String: 60

**[Responses to WPOREA have been combined with multiple responses to  
WPREAS and recoded in variables: WPREAMOH WPREAMRH WPREAMRE  
WPREAMVR WPREAMFI WPREAMFA WPREAMEN WPREAMCH WPREAMST  
WPREAMDT WPREAMYO WPREAM85 WPREAM86 WPREAMNO]**

**WPREAM @**

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 85 Other response (not codeable 1-11)
- 86 Irrelevant response
- 97 SPONTANEOUS: Does not consider has retired early

[Responses to WPOREA have been combined with multiple responses to WPRESAS and recoded in variables **WPREAMOH** **WPREAMRH** **WPREAMRE** **WPREAMVR** **WPREAMFI** **WPREAMFA** **WPREAMEN** **WPREAMCH** **WPREAMST** **WPREAMDT** **WPREAMYO** **WPREAM85** **WPREAM86** **WPREAMNO**]

END FILTER

*IF more than one reason for taking early retirement > 1 [WpReas.CARDINAL > 1]*

**WPMREA**

SHOW CARD E8

What was ^[your/name's] main reason for taking early retirement?

CODE ONE ONLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

END FILTER

END FILTER

END FILTER

*IF offered early retirement incentives = no OR reason for taking early retirement = does not consider self to have retired early OR ( offered early retirement incentives <> RESPONSE AND offered early retirement incentives at last interview<> RESPONSE AND reason for retiring at last interview <> RESPONSE)*

*[( WpERet = 2 OR WpReas = 97 OR (WpERet <> RESPONSE) AND WpEret(Last int) <> RESPONSE AND WpRRe (Last int) <> RESPONSE)]*

**WPRRE @**

SHOW CARD E9

What were ^[your/name's] reasons for retiring?

CODE ALL THAT APPLY.

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

[code maximum 13 out of 13 possible responses]

*[Responses to WPRRE are recoded in variables WPRRAG WPRROH WPRRRH  
WPRRRE WPRRFI WPRRFA WPRREN WPRRCH WPRRST WPSSDT WPERRYO  
WPERR95 WPERR96]*

*/F reason for retirement = other [WpRRe = 95]*

**WPORRE @**

INTERVIEWER: Write in the other reason.

String: 60

*[Responses to WPORRE have been combined with multiple responses to  
WPRRE and recoded in variables: WPRREMAG WPRREMOH WPRREMRH  
WPRREMRE WPRREMFI WPRREMFA WPRREMEN WPRREMCH WPRREMST  
WPRREMDT WPRREMYO WPRREMLI WPRREMYO WPRREMAF WPRREM85  
WPRREM86 WPRREM96]*

**WPRRM@**

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 12 Life event – (re)married/moved house/death of spouse
- 13 Could afford to
- 85 Other response (not codeable 1-13)
- 86 Irrelevant response
- 96 None of these

END FILTER

*IF more than one reason for retirement > 1 [WpRRe.CARDINAL > 1]*

**WPMRRE**

SHOW CARD E9

What was ^[your/name's] main reason for retiring?

CODE ONE ONLY

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

END FILTER

*IF reason for retirement = reached retirement age AND reason for retirement <> made redundant [(WpRRe = 1) AND (WpRRe <> 4)]*

**WPWKR**

Did ^[you/name's] have the opportunity to work past retirement age?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

**WPPHI**

^[Are you/Is name] covered by private health insurance, whether in ^[your/his/her] own name or through another family member?

INTERVIEWER: Don't include dental or friendly plans.

Include cover through ex-family members in code 2.

- 1 Yes, in own name
- 2 Yes, through another family member
- 3 No, not insured

*IF covered by private health insurance = yes, in own name [WpPHI = 1]*

*IF (employment status = self-employed AND derived activity status = paid work, temporarily away from paid work) OR NOT (derived activity status = paid work, temporarily away from paid work)  
[((WpEs = SelfEmp) AND (WPActW=1,2)) OR NOT (WPActW=1,2)]*

**WPHOWU**

How is this Health Insurance paid for?

- 1 Paid for by [^you/[^name]]

2 Paid for by someone else

*IF who pays for health insurance = someone else [WpHowU = 2]*

**WPHLWHO @**

INTERVIEWER: Write in who pays for the insurance.

String: 40

**[Open responses to WPHLWHO are coded and reported in WPHLWZ]**

**WPHLWZ**

- 1 Partner/Husband/Wife
- 2 Other family member
- 3 Company/Employer
- 4 Pension fund
- 85 Other answer - not codeable 01-04
- 86 Irrelevant response - not codeable 01-04

END FILTER

END FILTER

*IF (employment status = self-employed AND derived activity status = paid work, temporarily away from paid work) [(WpEs = 1) AND (WPActW=1,2)]*

**WPHOWE**

How is this Health Insurance paid for?

- 1 Pays for all or part of it directly
- 2 Employer deducts it from wages
- 3 Employer pays it fully as a benefit

END FILTER

*IF how health insurance paid for = respondent pays OR who pays for health insurance = respondent [(WpHowE = 1) OR (WpHowU = 1)]*

**WPMHI**

How much ^[do you/does name] pay per month for this insurance?

Please include the contribution for all family members covered by insurance in ^[your/his/her] name.

INTERVIEWER: Write in amount.

Range: 0..999997

*IF amount pay for health insurance = DK, RF [(WpMHI = DK) OR (WpMHI = RF)]*

**WPMHLB @**

Is it.....

BRACKETS (500, 1000, 2000, 5000)

**[Bracket results are recoded in WPMHIL WPMHIU WPMHIE WPMHIR]**

END FILTER

END FILTER

END FILTER

**WPX @**

INTERVIEWER: The Work and Pensions section is finished.

Please enter 1 here to make the program store the current time and date.

1 Press <1> and <Enter> to continue.

## **WP Module Checks**

### **WP1 WPACT**

*IF (activities done in past month = RESPONSE) AND (activities done in past month = other) [WpAct = RESPONSE AND WpAct = 96]*

*CHECK: (activities done in past month = none) AND (activities done in past month = at least one other answer) [WpAct.CARDINAL = 1]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

*END CHECK*

*END OF FILTER*

### **WP2 WPLJOBM**

*IF main reason for leaving previous job = RESPONSE [WpLJobM = RESPONSE]*

*CHECK: main reason for leaving previous job IN reason for leaving previous job [WpLJobM.ORD IN WpLJob]*

*[^wpljobm] wasn't mentioned at WPLJob! Please change!*

*END CHECK*

*END OF FILTER*

### **WP3 WPCJB**

*IF condition of employment = none [WpCJb = 96]*

*CHECK: (condition of employment = none) AND (condition of employment = at least one other answer) [WpCJb= none, WpCJb.CARDINAL = 1]*

*'None' is an exclusive code at this question. Please change!*

*END CHECK*

*END OF FILTER*

### **WP4 SPARE**

#### **WP5 WPSJOBM**

#### **WP6 WPSJOBM**

#### **WP7 WPSJOBM**

*IF year of feed forward data = RESPONSE [FWYear = RESPONSE]*

*CHECK: year of start of current job <= ^year of feed forward data*

[WpsjobY <= FWYear]  
INTERVIEWER: This is later than [^year of feed forward data]! Please check!  
END CHECK  
END OF FILTER

*IF date of birth = RESPONSE [DoB = RESPONSE]*

CHECK: (year of start of current job - year of birth) >= 14  
[WpsjobY - IDoB.YEAR >= 14]

Check: This means that [^iname] was less than 14 when he / she started their current job. Please check

END CHECK  
END OF FILTER

*IF (month of start of current job= RESPONSE) AND (month of start of current job = [January .. December]) [(WpsjobM = RESPONSE) AND (WpsjobM = [1 .. 12])]*

*IF Interview date = RESPONSE [SIntDat = RESPONSE]*  
CHECK: interview date >= date started current job  
[SIntDat >= TODATE (WpsjobY, WpsjobM.ORD, 1)]  
INTERVIEWER: This date is in the future ([^wpsjobm ^wpsjoby])! Please change!  
END CHECK  
END OF FILTER  
END OF FILTER

## WP8 WPWHYJBM

*IF main reason for taking present job = RESPONSE [WpWhyJbM = RESPONSE]*  
CHECK: main reason for taking present job IN reason for taking present job  
[WpWhyJbM.ORD IN WpWhyJb]  
[^WpWhyJbm] wasn't mentioned at WpWhyJb! Please change!  
END CHECK  
END OF FILTER

## WP9 WPHJOB

*IF hours worked per week (employee) = RESPONSE [WpHjob = RESPONSE]*  
CHECK: hours worked per week < 70 [WpHjob < 70]

INTERVIEWER: That seems high ([^wphjob] hours), can I check?  
END CHECK  
END OF FILTER

#### WP10 WPHWRK

*IF hours worked per week (self-employed) = RESPONSE [WpHwrk = RESPONSE]*  
CHECK: hours worked per week < 70 [WpHwrk < 70]  
INTERVIEWER: That seems high ([^wphwrk] hours), can I check?  
END CHECK  
END OF FILTER

#### WP11 WPWLYY

*IF gross amount of income in past year = RESPONSE [WpWlyy = RESPONSE]*  
CHECK: gross amount of income in past year <= 100000  
[WpWlyy <= 100000 ENG]  
INTERVIEWER: Are you sure? £[^Wpwlyy] seems high - please check.  
END CHECK  
END OF FILTER

#### WP12 WPLLSY

*IF (year of start of last job = RESPONSE) AND (year of feed forward data = RESPONSE)  
[(WpllsY = RESPONSE) AND (FWYear = RESPONSE)]*  
CHECK: year of start of last job <= year of feed forward data  
[WpllsY <= FWYear]  
INTERVIEWER: This is later than [^year of feed forward data]! Please check!  
END CHECK  
END OF FILTER

#### WP13 WPLLJY

#### WP14 WPLLJY

*IF whether post-interview editing question = yes [EditQre = 1]*  
*IF (year when last job ended= RESPONSE) AND (date of birth = RESPONSE)*  
[WplljY = RESPONSE AND IDoB = RESPONSE]

CHECK: year when last job ended >= year of birth [WplljY >= IDoB.YEAR]  
EDIT: Wplljy ([^wplljy]) is before respondent's year of birth ([^idob]).  
END CHECK  
END OF FILTER  
END OF FILTER

*IF (year when last job ended = RESPONSE) AND (year of feed forward data = RESPONSE)  
[WplljY = RESPONSE AND FWYear = RESPONSE]*

CHECK: year when last job ended <= [^year of feed forward data]  
[WplljY <= FWYear]  
INTERVIEWER: This is later than [^year of feed forward data]! Please check!  
END CHECK  
END OF FILTER

#### WP15 WPLLJM

*IF (((year when last job ended = RESPONSE) AND (month when last job ended =  
[January .. December])) AND (year when last job started = RESPONSE)) AND  
(month when last job started = [January .. December])  
[((WplljY = RESPONSE) AND (WplljM = [1 - 12])) AND (WpllsY = RESPONSE)) AND (WpllsM = 1 - 12)]*

CHECK: date job began <= date job ended  
[TODATE (WpllsY, WpllsM.ORD, 1) <= TODATE (WplljY, WplljM.ORD, 1)]  
INTERVIEWER: The job ended before it began! Please change!  
END CHECK  
END OF FILTER

#### WP16 WPYSTPM

*IF main reason for stopping working = RESPONSE [WpYSTpM = RESPONSE]*

CHECK: main reason for stopping working IN reason for stopping working  
[WpYSTpM.ORD IN WpYSTp]  
'Main' reason was not given as a reason at WpYSTp. Please change!  
END CHECK  
END OF FILTER

#### WP17 WPLPSY

*IF (year job started = RESPONSE) AND (year of feed forward data= RESPONSE)*

*[(WpLpsy = RESPONSE) AND (FWYear = RESPONSE)]*

CHECK: year job started <= year of feed forward data [WpLpsy <= FWYear]

INTERVIEWER: This is later than [^ year of feed forward data]! Please check!

END CHECK

END OF FILTER

## **WP18 WPLPSM**

*IF (PrevDate = RESPONSE) AND (year job started = RESPONSE AND month job started [January .. December]) [*

*PrevDate = RESPONSE AND WpLpsy = RESPONSE AND Wplpsm = [1 - 12]]*

CHECK: PrevDate < TODATE (year job started, month job started.ORD, 1) + (0, 1, 0)  
[PrevDate < TODATE (WpLpsy, Wplpsm.ORD, 1)+ (0, 1, 0)]

INTERVIEWER: Please check! [^Month job started ^year job started] is before the last interview!

END CHECK

END OF FILTER

## **WP19 WPLPEY**

*IF (year job ended = RESPONSE) AND (year of feed forward data = RESPONSE)  
[WpLpey = RESPONSE AND FWYear = RESPONSE]*

CHECK: year job ended <= year of feed forward data [WpLpey <= FWYear]

INTERVIEWER: This is later than [^year of feed forward data]! Please check!

END CHECK

END OF FILTER

## **WP20 WPLLJM**

*IF month job ended = [January .. December] AND year job ended = RESPONSE  
AND month job started = [January .. December] AND year job started=RESPONSE  
[Wplpem = [1 - 12] AND WpLpey = RESPONSE AND Wplpsm = [1 - 12] AND WpLpsy = RESPONSE]*

CHECK: date job started >= date job ended  
[TODATE (WpLpsy, Wplpsm.ORD, 1) <= TODATE (WpLpey, Wplpem.ORD, 1)]

INTERVIEWER: The job ended before it began! Please change!

END CHECK

END OF FILTER

## WP21 WPAOTP

IF gross amount paid = RESPONSE [WpAotp = RESPONSE]

CHECK: ((period covered = one week) AND (gross amount paid <= 3000) OR (period covered = two weeks) AND (gross amount paid <= 6000) OR (period covered = four weeks, one month) AND (gross amount paid <= 12000) OR (period covered = three weeks, two / three / six months, eight / nine / ten times a year, one year, less than a week, lump sum) AND (gross amount paid <= 150000))  
[((Wpotp = 1 AND WpAotp <= 3000) OR (Wpotp = 2 AND WpAotp <= 6000) OR (Wpotp = [4, 5] AND WpAotp <= 12000) OR (Wpotp = [3, 7 - 10, 13, 26, 52, 90, 95] AND WpAotp <= 150000))]

INTERVIEWER: Are you sure? £[^Gross amount paid] seems high - please check.

END CHECK

END OF FILTER

## WP22 WPTHM

IF amount of last take-home pay = RESPONSE [Wpthp = RESPONSE]

CHECK: ((period covered = one week) AND (amount of last take-home pay <= 2000) OR (period covered = two weeks) AND (amount of last take-home pay <= 4000) OR (period covered = [four weeks, one month]) AND (amount of last take-home pay <= 8000) OR (period covered = [three weeks, two / three / six months, eight / nine / ten times a year, one year, less than a week, lump sum]) AND (amount of last take-home pay <= 100000))  
[WpPeri = 1 AND Wpthp <= 2000 OR WpPeri = 2 AND Wpthp <= 4000 OR WpPeri = [4, 5] AND Wpthp <= 8000 OR WpPeri = [3, 7 - 10, 13, 26, 52, 90, 95] AND Wpthp <= 100000]

INTERVIEWER: Are you sure? £[^Amount of last take-home pay] seems high - please check.

END CHECK

END OF FILTER

## WP23 WPUPA

IF amount usually paid = RESPONSE [WpUPa = RESPONSE]

CHECK: ((period covered = one week) AND (amount usually paid <= 2000) OR (period covered = two weeks) AND (amount usually paid <= 4000) OR (period covered = [four weeks, one month]) AND (amount usually paid <= 8000) OR (period covered = [three weeks, two / three / six months, eight / nine / ten times a year, one year, less than a week, lump sum]) AND (amount usually paid <= 10000))  
[((WpUP = 1 AND WpUPa <= 2000) OR (WpUP = 2 AND WpUPa <= 4000) OR (WpUP = [4, 5] AND WpUPa <= 8000) OR (WpUP = [3, 7 - 10, 13, 26, 52, 90, 95] AND WpUPa <= 10000))]

INTERVIEWER: Are you sure? £[^Amount usually paid] seems high - please

check.  
END CHECK  
END OF FILTER

**WP24 WPRAIR**  
**WP25 WPRAIR**  
**WP26 WPRAIR**

*IF year of feed forward data = RESPONSE [FWYear = RESPONSE]*

*CHECK: year at start of most recent period when accounts have been prepared <= year of feed forward data [WpraIR <= FWYear]*

INTERVIEWER: This is later than [^year of feed forward data]! Please check!

END CHECK

*CHECK: year at start of most recent period when accounts have been prepared >= 1995 [WpraIR >= 1995]*

INTERVIEWER: That seems a long time ago ([^Year most recent period accounts have been prepared]). Can I check I have recorded that correctly?

END CHECK

END OF FILTER

*IF (month at start of most recent period when accounts have been prepared = [January .. December]) AND (date of interview = RESPONSE)  
[Wpralm = [1 - 12] AND IntDat = RESPONSE]*

*CHECK: date of interview >= date at start of most recent period when accounts have been prepared [IntDat >= TODATE (WpraIR, Wpralm.ORD, 1)]*

INTERVIEWER: This date is in the future ([^Month most recent period accounts have been prepared ^Year most recent period accounts have been prepared])! Please change!

END CHECK

END OF FILTER

**WP27 WPRAEY**  
**WP28 WPRAEY**

*IF year of feed forward data = RESPONSE [FWYear = RESPONSE]*

*CHECK: year at end of most recent period when accounts have been prepared <= year of feed forward data [WpraEY <= FWYear]*

INTERVIEWER: This is later than [^year of feed forward data]! Please check!

END CHECK

END OF FILTER

*CHECK: year at start of most recent period when accounts have been prepared >= 1995 [WpraEY >= 1995]*

INTERVIEWER: That seems a long time ago ([^Year of most recent period accounts have been prepared for Inland Revenue]). Can I check I have recorded that correctly?

END CHECK

**WP29 WPRAEM**

**WP30 WPRAEM**

*IF (month at end of most recent period when accounts have been prepared = [January .. December]) AND (date of interview = RESPONSE)  
[WpraEM = [1 - 12] AND IntDat = RESPONSE]*

*CHECK: interview date >= date at end of most recent period when accounts have been prepared [IntDat >= TODATE (WpraEY, WpraEM.ORD, 1)]*

INTERVIEWER: This date is in the future ([^Month of most recent period accounts have been prepared for Inland Revenue ^Year of most recent period accounts have been prepared for Inland Revenue])! Please change!

END CHECK

END OF FILTER

*IF (month at end of most recent period when accounts have been prepared = [January ... December]) AND (year at end of most recent period when accounts have been prepared =RESPONSE) AND (month at start of most recent period when accounts have been prepared = [January .. December]) AND (year at start of most recent period when accounts have been prepared = RESPONSE)  
[WpraEM = [1 - 12] AND WpraEY = RESPONSE AND WpraIM = [1 - 12] AND WpraIR = RESPONSE]*

*CHECK: date at start of most recent period when accounts have been prepared < date at end of most recent period when accounts have been prepared  
[TODATE (WpraIR, WpraIM.ORD, 1) < TODATE (WpraEY, WpraEM.ORD, 1)]*

INTERVIEWER: The start date should be before the end date! Please change!

END CHECK

END OF FILTER

**WP31 WPPROF**

*IF amount of share of profit or loss on accounts = RESPONSE [WpProf = RESPONSE]*

*CHECK: amount of share of profit or loss accounts <= 120000 [WpProf <= 120000]*

INTERVIEWER: Are you sure? £[^Amount pf share of profit or loss on accounts]

|| seems high - please check.  
END CHECK  
END OF FILTER

### WP32 WPBIWA

*IF average weekly income from business = RESPONSE [WpBlwa = RESPONSE]*

*CHECK: average weekly income from business <= 8000 [WpBlwa <= 8000]*  
INTERVIEWER: Are you sure? £[^Average weekly income from business] seems high - please check.  
END CHECK  
END OF FILTER

### WP33 WPBIMA

*IF average monthly income from business = RESPONSE [WpBlma = RESPONSE]*

*CHECK: average monthly income from business <= 30000 [WpBlma <= 30000]*  
INTERVIEWER: Are you sure? £[^Average monthly income from business] seems high - please check.  
END CHECK  
END OF FILTER

### WP34 WPBUSV

*IF amount business is worth = RESPONSE [WpbusV = RESPONSE]*

*CHECK: amount business is worth <= 2000000 [WpbusV <= 2000000]*  
INTERVIEWER: Are you sure? £[^Amount business is worth] seems high – please check.  
END CHECK  
END OF FILTER

### WP35 WPHMSJ

*IF hours worked per month in other jobs = RESPONSE [WpHmsj = RESPONSE]*

*CHECK: (hours worked per month in other jobs < 70) INVOLVING (hours worked per month in other jobs)  
[tohours < 70 INVOLVING WpHmsj]*  
INTERVIEWER: This means [^iname] works more than 70 hours per week (in all

his / her jobs). Please check.

END CHECK

END OF FILTER

### WP36 WPESJ

*IF total income from other jobs = RESPONSE [WpEsj = RESPONSE]*

*CHECK: total income from other jobs <= 5000 [WpEsj <= 5000]*

INTERVIEWER: Are you sure? £[<sup>^</sup>Total income from other jobs] seems high – please check.

END CHECK

END OF FILTER

# English Longitudinal Study of Ageing

Wave Six Interview Questionnaire – 2012 to 2013

## 6 INCOME AND ASSETS MODULE (IA)

### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

#### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

#### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

#### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

#### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

#### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## INCOME AND ASSETS MODULE (IA)

### IAINTRO\*

We are interested in how people are managing financially these days. Some people's income varies over time and so in order to clearly understand how people are managing financially, we need to consider their situation in the last year rather than just over the last month.

[^BLANK / Even though [^partner's name] is not living here at the moment, we are still interested in any income that [^he / she] may receive or income that is paid to [^you / [^name]] on their behalf. Please include any income that is paid directly to social services or to the home they are staying in.]

The next questions are about types of income [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] may [^receive / have received]. We may have asked [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] some of the details earlier but it is important for us to check that we understand [^your / [^name's]] situation correctly.

INTERVIEWER: Press <1> and <Enter> to continue

1 Continue

2 Refuses to answer about husband/wife

### IAWORK\*

Did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] do any work for pay in the last year (that is since [^date a year ago])?

ASK OR CODE.

1 Yes

2 No

*IF whether did paid work in last year = yes [IAWork = 1]*

### IASINC\*

About how much wage and salary income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner] receive in the last year before taxes and other deductions?

Range: 0..999997

### **[CHECK IA1]**

*IF wage and salary income = DK, RF [laSInc =DK, RF]*

### IASINCB\*@

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 35000, 100000)

***[Bracket results are recoded in IASINCL IASINCU IASINCE IASINCR]***

END OF FILTER

END OF FILTER

### IASPEN\*

Did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] receive any money from a state pension in the last year (that is since [^date a year ago])?

INTERVIEWER: Include basic state pension and SERPS.

1 Yes

2 No

*IF ((whether received state pension in last year = yes) AND (whether partner in household = yes)) AND  
NOT (continued with module IA = RF)  
[((laSPen = 1) AND (IAask = 1)) AND NOT (IAIntro = 2)]*

**IASPW\***

Which of [^you / them] received the state pension in the last year?

- 1 Respondent only
- 2 Spouse / partner only
- 3 Both

**[CHECK IA2 - IA3]**

END OF FILTER

*IF ((whether received state pension in last year = yes) AND (whether partner in household <> yes)) OR  
(who received state pension = respondent, both)  
[((laSPen = 1) AND (IAask <> 1)) OR (laSPW = 1, 3)]*

**IASPA\***

How much [^do you / does [^name]] receive from the state pension?

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF period covered by state pension = RESPONSE [lasPa = RESPONSE]*

**IAPAM\***

INTERVIEWER: Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.

Range: 0..99997

**[CHECK IA4]**

END OF FILTER

*IF (period covered by state pension = DK, RF OR (state pension amount = DK, RF)  
[(lasPa = DK,RF)] OR (laPAM = DK, RF)]*

*IF period covered by state pension = one week [lasPa = 1]*

**IASPWB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAPAMWL IAPAMWU IAPAMWE IAPAMWR]**

ELSE IF period covered by state pension = two weeks [lasPa = 2]

**IASPFB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAPAMFL IAPAMFU IAPAMFE IAPAMFR]**

ELSE IF period covered by state pension = [four weeks, one month] [lasPa = [4, 5]]

**IASPMB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAPAMML IAPAMMU IAPAMME IAPAMMR]**

ELSE IF period covered by state pension = [one year, lump sum] [lasPa = [52, 95]]

**IASPYB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 4000, 5000, 7500)

**[Bracket results are recoded in IAPAMYL IAPAMYU IAPAMYE IAPAMYR]**

ELSE

**IASPOB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAPAMOL IAPAMOU IAPAMOE IAPAMOR]**

END OF FILTER

END OF FILTER

END OF FILTER

## **W6: Removed IAPLY IAPLYW**

IF who received state pension = spouse / partner, both [laSPW = 2, 3]

**IASPP\***

How much [^does / did] [^your / his / her] [^husband / wife / partner] receive from the state pension?

INTERVIEWER: Code period covered.

01 One week

- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF period covered by partner's state pension = RESPONSE [laSPp = RESPONSE]*

**IAPPAM\***

INTERVIEWER: Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.

Range: 0..99997

**[CHECK IA5]**

END OF FILTER

*IF (period covered by partner's state pension = DK,RF) OR (state pension amount = DK,RF)  
[(laSPp = DK,RF) OR (laPPAm = DK, RF)]*

*IF period covered by partner's state pension = one week [laSPp = 1]*

**IAPPWB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAAPAWL IAAPAWU IAAPAWE IAAPAWR]**

*ELSE IF period covered by partner's state pension = two weeks [laSPp = 2]*

**IAPPFB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAAP AFL IAAP AFU IAAP AFE IAAP AFR]**

*ELSE IF period covered by partner's state pension = four weeks, one month  
[laSPp = [4, 5]]*

**IAPPMB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAAPAML IAAPAMU IAAPAME IAAPAMR]**

ELSE IF period covered by partner's state pension = [one year, lump sum] [laSPp = [52, 95]]

**IAPPYB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 4000, 5000, 7500)

**[Bracket results are recoded in IAAPAYL IAAPAYU IAAPAYE IAAPAYR]**

ELSE

**IAPOB\*@**

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAAPAOL IAAPAOU IAAPAOE IAAPAOR]**

END OF FILTER

END OF FILTER

END OF FILTER

removed **IAPLYP\* IAPLW**

**IAPPEN\***

Did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] receive any money from a personal or employer pension in the last year (that is since [^date a year ago])?

If Yes: You can tell me either a yearly total or monthly amounts.

1 Yes, monthly

2 Yes, yearly

3 No

IF whether received personal or employer pension in last year = yes, monthly [laPPen = 1]

**IAPPMO\***

About how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive in the last month from personal or employer pensions before taxes and other deductions?

INTERVIEWER: Do not include any lump sums received.

Range: 0..999997

END OF FILTER

**[CHECK IA6]**

IF (amount received personal or employer pension = DK,RF) [laPPeI = DK, RF]

**IAPPMOB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (1500, 4000, 8000, 30000)

**[Bracket results are recoded in IAPPMOL IAPPMOU IAPPMOE IAPPMOR]**

END OF FILTER

*IF whether received personal or employer pension in last year = yes, yearly [laPPen = 2]*

**IAPPEI\***

About how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive in the last year from personal or employer pensions before taxes and other deductions?

INTERVIEWER: Do not include any lump sums received.

Range: 0.999997

**[CHECK IA6]**

END OF FILTER

*IF (amount received personal or employer pension = DK, RF) [laPPeI = DK, RF]*

**IAPPEIB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 8000, 30000)

**[Bracket results are recoded in IAPPEIL IAPPEIU IAPPEIE IAPPEIR]**

END OF FILTER

**IAANIN\***

Apart from any pension annuity income and anything else you have already told me about, did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] receive any annuity income in the last year (that is since [^date a year ago])?

Annuity income is when you make a lump sum payment to a financial institution and in return they give you a regular income for the rest of your life.

1 Yes

2 No

*IF ((whether any other annuity income in last year = yes) AND (whether partner in household = yes))  
AND NOT (continued with module IA = RF)*

*[(laAnIn = 1) AND (IAask = 1)] AND NOT (IAIntro = 2)]*

**IAAILY\***

Which of [^you / them] received annuity income in the last year?

1 Respondent only

2 Spouse / partner only

3 Both

END OF FILTER

*IF (who received annuity income in last year = respondent, both) OR (whether any other annuity income in last year = yes) AND (whether partner in household too <> yes)*

*[(laAlly = [1, 3]) OR ((laAnIn = 1) AND (IAask <> 1))]*

**IAAIM\***

How much annuity income did [^you / [^name]] receive in the last year after tax?  
Range: 0..999997

**[CHECK IA7]**

*IF (annuity income amount in last year = DK, RF) [laAlm = DK]*

**IAAIMB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (400, 1000, 2000, 15000)

**[Bracket results are recoded in IAAIML IAAIMU IAAIME IAAIMR]**

END OF FILTER

END OF FILTER

*IF who received annuity income in last year = spouse / partner, both] [laAlly = 2, 3]*

**IAAIP\***

How much annuity income did [^your / his / her] [^husband / wife / partner] receive in the last year after tax?  
Range: 0..999997

**[CHECK IA8]**

*IF (annuity income partner received in last year = DK, RF) [laAlp = DK,RF]*

**IAAIPB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (400, 1000, 2000, 15000)

**[Bracket results are recoded in IAAIPL IAAIPU IAAIPE IAAIPR]**

END OF FILTER

END OF FILTER

**IAHDBC\***

SHOW CARD F1

[^Are you / Is your husband / wife / partner] receiving any of these health or disability benefits at the moment?

INTERVIEWER: Only include benefits that the respondent is currently receiving.

1 Yes

2 No

*IF health or disability benefit receipt = yes [lahdbc=1]*

**IAHDN\*@**

SHOW CARD F1

Which of these health or disability benefits [^are you / is [^name]] receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

IF respondent asks about Disabled Persons Tax Credit or Disability Working Allowance,

explain that this benefit was abolished in April 2003 and became part of the Working Tax Credit.

- 01 Incapacity Benefit previously Invalidity Benefit
- 02 Employment and Support Allowance
- 03 Severe Disablement Allowance SDA
- 04 Statutory sick pay SSP
- 05 Attendance Allowance
- 06 Disability Living Allowance
- 07 Industrial Injuries Disablement Benefit
- 08 War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme
- 09 Carer's Allowance
- 95 Some other benefit for people with disabilities (SPECIFY)
- 96 None of these

*[Multiple responses to IAHDN are recoded in variables IAHDNIB IAHDNES IAHDNSD IAHDNSP IAHDNAA IAHDNDL IAHDNII IAHDNWD IAHDNCA IAHDN85 IAHDN95 IAHDN96 merged: IAHDNIB IAHDNAA IAHDNDL IAHDNII IAHDNWD IAHDNCA IAHDN85 IAHDN95 IAHDN96 IAHDN96]*

**[code maximum 9 out of 10 possible responses]**

*IF health or disability benefit type = other [IAHDN = 95]*

**IAHDNO @**

INTERVIEWER: Enter the name of the other benefit  
String [40]

END OF FILTER

**[CHECK IA11]**

LOOP FOR EACH HEALTH OR DISABILITY BENEFIT CURRENTLY RECEIVING

**[CHECK IA12]**

END OF FILTER

END OF FILTER

*IF (health or disability benefit type = RESPONSE) AND NOT (health or disability benefits type = none)  
[(lahdN = RESPONSE) AND NOT (lahdN =96)]*

*LOOP FOR EACH HEALTH OR DISABILITY BENEFIT CURRENTLY RECEIVING (from IAHDN)*

**IAP\***

How much did [^you / [^name] / [^your / [^name's]] [^husband / wife / partner]  
[^BLANK / usually] receive from [^Incapacity benefit previously named invalidity benefit /  
Employment and Support Allowance / Severe Disablement Allowance SDA / Statutory sick  
pay SSP / Attendance Allowance / Disability Living Allowance / Industrial Injuries  
Disablement Benefit / War Disablement Pension or War Widow's Pension or Armed Forces  
Compensation Scheme / Carer's Allowance.] [^BLANK / last time]?  
INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**[Answers for each health or disability benefit currently receiving (from IAHDN) are recoded in IAP to IAP10]**

*IF period amount covers = RESPONSE [IaP = RESPONSE]*

**IAA\***

INTERVIEWER: Enter the amount. Round to the nearest pound.

[^BLANK / If don't know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each health or disability benefit currently receiving (from IAHDN) are recoded in IAA to IAA10]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received =DK, RF)  
[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week [IaP = 1]*

**IAWB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA1WL IAA1WU IAA1WE IAA1WR to IAA10WL  
IAA10WU IAA10WE IAA10WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA1FL IAA1FU IAA1FE IAA1FR to IAA10FL  
IAA10WU IAA10FE IAA10FR]**

*ELSE IF period amount covers = four weeks, one month [IaP = [4, 5]]*

**IAMB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA1ML IAA1MU IAA1ME IAA1MR to IAA10ML IAA10MU IAA10ME IAA10MR]**

ELSE IF period amount covers = one year, lump sum [laP = [52, 95]]

**IAYB\* @**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA1YL IAA1YU IAA1YE IAA1YR to IAA10YL IAA10YU IAA10YE IAA10YR]**

ELSE

**IAOB\* @**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA1OL IAA1OU IAA1OE IAA1OR to IAA10OL IAA10OU IAA10OE IAA10OR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

IF whether partner in household = yes AND continued with module IA = continued  
[(IAask = 1) AND (IAIntro = 1)]

**IAHDPN\* @**

SHOW CARD F1

Which of these health or disability benefits is [^your / his / her] [^husband / wife / partner]  
receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

01 Incapacity Benefit previously Invalidity Benefit

02 Employment and Support Allowance

03 Severe Disablement Allowance SDA

04 Statutory sick pay SSP

05 Attendance Allowance

06 Disability Living Allowance

07 Industrial Injuries Disablement Benefit

08 War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme

09 Carer's Allowance

95 Some other benefit for people with disabilities (SPECIFY)

96 None of these

*[Multiple responses to IAHDHP are recoded in variables IAHDPNIB IAHDPNESIAHDPNSD IAHDPNSP IAHDPNAA IAHDPNDL IAHDPNII IAHDPNWD IAHDPNCA IAHDPN95 IAHDPN96 merged IAHDPMIB IAHDPMES IAHDPMSD IAHDPMSP IAHDPMAA IAHDPMDL IAHDPMII IAHDPMWD IAHDPMCA IAHDPM95 IAHDPM96]*  
*[code maximum 9 out of 10 possible responses]*

**[CHECK IA13]**

*IF (partner's health or disability benefit type = other) AND (whether post-interview editing question <> yes OR (partner's health or disability benefits = EMPTY, other))  
[(lahdp = 95) AND (EditQre <> 1 OR (lahdpz = [EMPTY, 95]))]*

**IAHDPO\* @**

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT  
String 40

END OF FILTER

**[CHECK IA14]**

*IF (partner's health or disability benefit type = RESPONSE) AND NOT (partner's health or disability benefits = none) [(lahdp = RESPONSE) AND NOT (lahdp = 96)]*

**[CHECK IA15]**

LOOP FOR EACH HEALTH OR DISABILITY BENEFIT CURRENTLY RECEIVING

**[CHECK IA16]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (benefits partner is receiving at the moment = RESPONSE) AND NOT (benefits partner is receiving at the moment = none) [lahdPn = RESPONSE) AND NOT (lahdp= 96)]*

LOOP FOR EACH HEALTH OR DISABILITY BENEFIT PARTNER IS CURRENTLY RECEIVING

**IAP\* @**

How much did [^you / [^name] / [^your / [^name's]] [^husband / wife / partner]  
[^BLANK / usually] receive from [^Incapacity Benefit (previously Invalidity Benefit) / Severe Disablement Allowance (SDA) / Statutory sick pay (SSP) etc.] [^BLANK / last time]?

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months

08 Eight times a year  
09 Nine times a year  
10 Ten times a year  
13 Three months / 13 weeks  
26 Six months / 26 weeks  
52 One Year / 12 months / 52 weeks  
90 Less than one week  
95 One off / lump sum  
96 None of these (EXPLAIN IN A NOTE)

**[Answers for each health or disability benefit currently receiving (from IAHD PN) are recoded in IAP11 to IAP20]**

*IF period amount covers = RESPONSE [laP = RESPONSE]*

**IAA\***

INTERVIEWER: Enter the amount.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each health or disability benefit currently receiving (from IAHD PN) are recoded in IAA11 to IAA20]**

END OF FILTER

**[CHECK IA17]**

*IF (period amount covers = DK, RF) OR (amount received = DK, RF)  
[(laP = DK, RF) OR (laA = DK, RF)]*

*IF period amount covers = one week [laP = 1]*

**IAWB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA11WL IAA11WU IAA11WE IAA11WR to  
IAA20WL IAA20WU IAA20WE IAA20WR]**

*ELSE IF period amount covers = two weeks [laP = 2]*

**IAFB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA11FL IAA11FU IAA11FE IAA11FR to  
IAA20FL IAA20FU IAA20FE IAA20FR]**

*ELSE IF period amount covers =four weeks, one month [laP = 4, 5]*

**IAMB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA11ML IAA11MU IAA11ME IAA11MR to  
IAA20ML IAA20MU IAA20ME IAA20MR]**

*ELSE IF period amount covers = one year, lump sum [laP = 52, 95]*

**IAYB\*** @

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA11YL IAA11YU IAA11YE IAA11YR to  
IAA20YL IAA20YU IAA20YE IAA20YR]**

ELSE

**IAOB\*** @

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA11OL IAA11OU IAA11OE IAA11OR to  
IAA20OL IAA20OU IAA20OE IAA20OR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IABEBC\***

SHOW CARD F2

[^Are you / Is [^your husband / wife / partner]] receiving any of these benefits at the moment?

INTERVIEWER: Do not include housing benefit, council tax benefit or winter fuel allowance as "other".  
These are covered by later questions.

Only include benefits that the respondent is currently receiving

1 Yes

2 No

*IF whether receiving benefits = yes [laBeB = 1]*

**IABEN\***

SHOW CARD F2

Which of these benefits [^are you / is [^name]] receiving at the moment?

PROBE: What others? CODE ALL THAT APPLY.

[^BLANK / If respondent is aged 60 or over and says they are currently receiving Income Support or Minimum Income guarantee (MIG) explain that this benefit was replaced in October 2003 with Pension Credit.]

01 Income Support

02 Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)

03 Working Tax Credit (formerly part of Working Families Tax Credit)

04 Job-seeker's Allowance formerly Unemployment Benefit

05 Guardian's Allowance

06 Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance

07 Child Benefit

08 Child Tax Credit

95 Some other State Benefit (SPECIFY)

96 None of these

[*Multiple responses to IABEN are recoded in variables IABENIS IABENPC IABENTC*

*IABENJA IABENGA IABENWP IABENCB IABENCC IABEN95 IABEN96]*

*[code maximum 9 out of 10 possible responses]*

*IF benefits received = other [IaBen = 95]*

**IABENO @**

INTERVIEWER: Enter the name of the other benefit

*[Open responses to responses to IABEN are merged with responses from IABEN and recoded in variables IABENMIS IABENMPC IABENMTC IABENMJIA IABENMGA IABENMWI IABENMCB IABENMCC IABENMEC IABENM85 IABENM86 IABENM96]*

END OF FILTER

**[CHECK IA22 - IA23]**

END OF FILTER

*IF (benefits received at the moment = RESPONSE) AND NOT (benefits received at the moment = none) [(IaBeN = RESPONSE) AND NOT (IaBeN = 96)]*

#### **LOOP FOR EACH WORK AND INCOME BENEFIT CURRENTLY RECEIVING**

**IAP\***

How much did [^you / [^name] / [^your / [^name's]] [^husband / wife / partner]  
[^BLANK / usually] receive from [^Income Support / Pension Credit (income support for  
the over 60's, replaced Minimum Income Guarantee in October 2003) / Working Tax Credit  
(formerly part of Working Families Tax Credit) / Job-seeker's Allowance formerly  
Unemployment Benefit / Guardian's Allowance / Widow's pension or Widowed mother's  
allowance or Widowed Parent's allowance or Bereavement allowance / Child Benefit /  
Child Tax Credit] [^BLANK / last time]?

INTERVIEWER: Code period covered.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 Nine times a year

10 Ten times a year

13 Three months / 13 weeks

26 Six months / 26 weeks

52 One Year / 12 months / 52 weeks

90 Less than one week

95 One off / lump sum

96 None of these (EXPLAIN IN A NOTE)

*[Answers for each work or income benefit currently receiving (from IABEN) are recoded in IAP21 to IAP29]*

*IF period amount covers = RESPONSE [IaP = RESPONSE]*

**IAA\* @**

INTERVIEWER: Enter the amount.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each work or income benefit currently receiving (from IABEN) are recoded in IAA21 to IAA29]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received =DK, RF) [(laP = DK, RF) OR (laA = DK, RF)]*

*IF period amount covers = one week [laP = 1]*

**IAWB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA21WL IAA21WU IAA21WE IAA21WR to IAA29WL IAA29WU IAA29WE IAA29WR]**

*ELSE IF period amount covers = two weeks [laP = 2]*

**IAFB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA21FL IAA21FU IAA21FE IAA21FR to IAA29FL IAA29FU IAA29FE IAA29FR]**

*ELSE IF period amount covers = four weeks, one month [laP = 4, 5]*

**IAMB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA21ML IAA21MU IAA21ME IAA21MR to IAA29ML IAA29MU IAA29ME IAA29MR]**

*ELSE IF period amount covers = one year, lump sum [laP = 52, 95]*

**IAYB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA21YL IAA21YU IAA21YE IAA21YR to IAA29YL IAA29YU IAA29YE IAA29YR]**

ELSE

**IAOB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA21OL IAA21OU IAA21OE IAA21OR to IAA29OL IAA29OU IAA29OE IAA29OR]**

END OF FILTER

END OF FILTER  
END OF FILTER  
END OF FILTER

*IF whether receiving benefits = yes [laBeB = 1]*

**IABEPN\*@**

SHOW CARD F2

Which of these benefits is [^ your husband/wife/partner] receiving at the moment?

PROBE: What others? CODE ALL THAT APPLY.

[^BLANK / If respondent is aged 60 or over and says they are currently receiving Income Support or Minimum Income guarantee (MIG) explain that this benefit was replaced in October 2003 with Pension Credit.]

01 Income Support

02 Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)

03 Working Tax Credit (formerly part of Working Families Tax Credit)

04 Job-seeker's Allowance formerly Unemployment Benefit

05 Guardian's Allowance

06 Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance

07 Child Benefit

08 Child Tax Credit

95 Some other State Benefit (SPECIFY)

96 None of these

*[Multiple responses to IABEPN are recoded in variables IABEPNIS IABEPNPC IABEPNWC IABEPNJA IABEPNGA IABEPNWP IABEPNCB IABEPNCC IABEPN95 IABEPN96]*

*[code maximum 9 out of 10 possible responses]*

**[CHECK IA24 - IA25]**

*LOOP FOR EACH WORK AND INCOME BENEFIT PARTNER CURRENTLY RECEIVING*

**IAP\***

How much did [^you / [^name] / [^your / [^name's]] [^husband / wife / partner]] [^BLANK / usually] receive from [^Income Support / Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003) / Working Tax Credit (formerly part of Working Families Tax Credit) / Job-seeker's Allowance formerly Unemployment Benefit / Guardian's Allowance / Widow's pension or Widowed mother's allowance or Widowed Parent's allowance or Bereavement allowance / Child Benefit / Child Tax Credit] [^BLANK / last time]?

INTERVIEWER: Code period covered.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 Nine times a year

- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**[Answers for each work or income benefit currently receiving (from IABEPN) are recoded in IAP30 to IAP38]**

*IF period amount covers = RESPONSE [IaP = RESPONSE]*

**IAA\***

INTERVIEWER: Enter the amount.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each work or income benefit currently receiving (from IABEPN) are recoded in IAA30 to IAA38]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received = DK, RF)  
[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week [IaP = 1]*

**IAWB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA30WL IAA30WU IAA30WE IAA30WR to  
IAA38WL IAA30WU IAA30WE IAA30WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA30FL IAA30FU IAA30FE IAA30FR to  
IAA38FL IAA30FU IAA30FE IAA30FR]**

*ELSE IF period amount covers = four weeks, one month [IaP = 4, 5]*

**IAMB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA30ML IAA30MU IAA30ME IAA30MR to  
IAA38ML IAA30MU IAA30ME IAA30MR]**

*ELSE IF period amount covers = one year, lump sum [IaP = 52, 95]*

**IAYB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)  
[Bracket results are recoded in IAA30YL IAA30YU IAA30YE IAA30YR to  
IAA38YL IAA30YU IAA30YE IAA30YR]

ELSE

**IAOB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

[Bracket results are recoded in IAA30OL IAA30OU IAA30OE IAA30OR to  
IAA38OL IAA30OU IAA30OE IAA30OR]

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

IF (person's age >= 60) OR ((whether partner in household = yes) AND (DMAge >= 60))  
[(IAgeOf >= 60) OR ((IAask = 1) AND (DMAge = >60))]

**IAFUEL\***

Did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] receive a Winter Fuel Payment in the last year (that is since [^date a year ago])?

1 Yes

2 No

END OF FILTER

**IAFAINT\*@**

Savings and Investments are an important part of some household's finances. The next questions ask about a number of different kinds of savings or investments [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] may have. [^BLANK / Please include only savings and investments held in [^your / [^name's]] sole name.]

1 Press <1> and <Enter>to continue.

**IASI\* @**

SHOW CARD F3

Which, if any, of these savings and investments [^do you / does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] have?

PROBE: What others?

INTERVIEWER: Code TESSA-only ISA (TOISA) as ISA.

CODE ALL THAT APPLY.

01 Current Account at a bank, building society or elsewhere

02 Savings Account at a bank, building society or elsewhere

03 TESSA

04 ISA

05 Premium Bonds

06 National Savings Accounts or Certificates

07 PEP

08 Stocks and / or Shares

09 Share Options / Employee share ownership

- 10 Share clubs
- 11 Unit or Investment Trusts
- 12 Bonds and Gilts (government or corporate)
- 95 Other Savings or Investments
- 96 None of these

**[Multiple responses to IASI are recoded in variables: IASICA IASISAV IASITESS IASIISA IASIPB IASINS IASIPPEP IASISHA IASIOPT IASISC IASIUUT IASIBG IASI95 IASI96]  
[code maximum 13 out of 14 possible responses]**

**[CHECK IA36]**

*IF savings and investments held = savings account, current account [laSI = 1,2]*

**IASAVA\***

In total, how much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in [^your / his / her] [^current account(s) / savings account(s) / current and savings account(s)] (at the bank, building society or elsewhere)?  
 [^BLANK / INTERVIEWER: If current account is overdrawn, enter amount in savings account only. / INTERVIEWER: Enter '0' if overdrawn.]  
 Range: 0..9999997

**[CHECK IA37]**

*IF amount of savings = DK, RF [laSava =DK,RF]*

**IASAVAB\*@**

Is it less than [^amount], more than [^amount] or what?  
 BRACKETS (1000, 5000, 20000, 150000)  
**[Bracket results are recoded in IASAVAL IASAVA IASVAE IASAVAR]**

END OF FILTER

**IASINT\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from (this / these) account(s) in the last year after tax?  
 Range: 0..99997

**[CHECK IA38]**

*IF interest received from accounts = DK, RF [laSint = DK, RF]*

**IASINTB\*@**

Was it less than [^amount], more than [^amount] or what?  
 BRACKETS (25, 100, 500, 7500)  
**[Bracket results are recoded in IASINTL IASINTU IASINTE IASINTR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = TESSA [laSI = 3]*

**IATI\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife /

partner]] have in TESSA's?

Range: 0..99997

**[CHECK IA39]**

*IF amount in Tessas = DK, RF [laTI = DK, RF]*

**IATIB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 20000, 50000)

**[Bracket results are recoded in IATIL IATIU IATIE IATIR]**

END OF FILTER

**IATII\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these accounts in the last year?

Range: 0..9997

**[CHECK IA40]**

*IF amount received from these accounts last year = DK, RF [laTli = DK, RF]*

**IATIIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (250, 500, 1000, 4000)

**[Bracket results are recoded in IATIL IATIU IATIE IATIR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = ISA [laSI = 4]*

**IAISA\* @**

Which of the following [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in ISA(s)...

INTERVIEWER: Read out.

CODE ALL THAT APPLY.

1 ... cash?

2 ... life insurance?

3 ... stocks and shares?

**[Multiple responses to IAISA are recoded in variables IAISACAS IAISALI IASIASHA]  
[code maximum 3 out of 3 possible responses]**

*IF type of ISA = cash [lalsa = 1]*

**IACISA\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] currently have in the cash components of ISA(s)?

Range: 0..999997

**[CHECK IA41]**

*IF amount in cash component of ISA =DK, RF [laCIsa = DK, RF]*

**IACISAB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 15000, 20000)

**[Bracket results are recoded in IACISAL IACISAU IACISAE IACISAR]**

END OF FILTER

END OF FILTER

*IF type of ISA = life insurance [laIsa = 2]*

**IALISA\***

How much is the life-insurance component of [^your / [^name's]] [^BLANK / and [^your / his / her] [^husband's / wife's / partner's]] ISA(s) currently worth?

Range: 0..999997

**[CHECK IA42]**

*IF how much life-insurance component of ISA worth = DK, RF [laLIsa = DK, RF]*

**IALISAB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (2000, 4000, 7500, 10000)

**[Bracket results are recoded in IALISAL IALISAU IALISAE IALISAR]**

END OF FILTER

END OF FILTER

*IF type of ISA = stocks and shares [laIsa = 3]*

**IASISA\***

How much is the stocks and shares component of [^your / [^name's]] [^BLANK / and [^your / his / her] [^husband's / wife's / partner's]] ISA(s) currently worth?

Range: 0..999997

**[CHECK IA43]**

*IF how much stocks and shares component of ISA worth = DK, RF [laSIsa = DK, RF]*

**IASISAB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 25000, 50000)

**[Bracket results are recoded in IASISAL IASIAU IASISAE IASISAR]**

END OF FILTER

END OF FILTER

**IAISAD\***

Not including any income that was re-invested, about how much income did [^you / [^name]]

[^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from (this / these) ISA(s) in the last year?

Range: 0..99997

**[CHECK IA44]**

*IF amount of income received from ISA last year = DK, REF [laIsaD =DK, RF]*

**IAISADB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 300, 2000)

**[Bracket results are recoded in IASADL IASADU IAISADE IAISDR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = premium bonds [laSI = 5]*

**IANPB\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in Premium Bonds?

Range: 0..9999997

**[CHECK IA45]**

*IF amount in Premium Bonds = DK, RF [laNPB = DK, RF]*

**IANPBB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 500, 5000)

**[Bracket results are recoded in IANPBL IANPLBU IANPBE IANPBR]**

END OF FILTER

**IANPBP\***

How much prize income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these bonds in the last year?

Range: 0..999997

**[CHECK IA46]**

*IF prize income received from these bonds = DK, RF [laNPBP = DK, RF]*

**IAPBPPB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 1000, 10000)

**[Bracket results are recoded in IAPBPL IAPBPU IAPBPE IAPBPR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = national savings accounts [laSI = 6]*

**IANS\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in National Savings Accounts or Certificates?

Range: 0..9999997

**[CHECK IA47]**

*IF amount in National Savings Accounts or Certificates = DK, RF [IaNS = DK, RF]*

**IANSB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (500, 2500, 10000, 100000)

**[Bracket results are recoded in IANSL IANSU IANSE IANSR]**

END OF FILTER

**IANSI\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these accounts or certificates in the last year after tax?

Range: 0..99997

**[CHECK IA48]**

*IF interest received after tax = DK, RF [IaNSi = DK, RF]*

**IANSIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10, 50, 150, 5000)

**[Bracket results are recoded in IANSIL IANSIU IANSIE IANSIR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = PEP [IaSI = 7]*

**IAIP\***

IF [^you / [^name]] chose to sell [^your / his / her] Personal Equity Plan(s) today, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have after paying any fees?

Range: 0..999997

**[CHECK IA49]**

*IF amount from Personal Equity plan if chose to sell = DK, RF [IaIP = DK, RF]*

**IAIPB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 25000, 100000)

**[Bracket results are recoded in IAIP1 IAIPU IAIPF IAIPR]**

END OF FILTER

**IAIPI\***

Not including any income that was reinvested, about how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these Personal Equity Plan(s) in the last year?

Range: 0..99997

**[CHECK IA50]**

*IF income received from personal equity plan in last year = DK, RF [laIPi = DK, RF]*

**IAIPIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 500, 1000, 7500)

**[Bracket results are recoded in IAIPIL IAIPIU IAIPIE IAIPIR]**

END OF FILTER

END OF FILTER

*IF laSI = stocks and shares, share options, share clubs [laSI = 8, 9, 10]*

**IASSS\***

IF [^you / [^name]] chose to sell [^your / his / her] [^stocks and shares / share options / share club shares / stocks and shares and share options / stocks and shares and share club shares / share options and share club shares / stocks and shares, share options and share club shares] today, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have?

Range: 0..9999997

**[CHECK IA51]**

*IF amount received if chose to sell = DK, RF [laSSS = DK, REF]*

**IASSSB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2500, 10000, 100000)

**[Bracket results are recoded in IASSSL IASSSU IASSSE IASSSR]**

END OF FILTER

**IASSSI\***

About how much dividend income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from [^stocks and shares / share options / share club shares / stocks and shares and share options / stocks and shares and share club shares / share options and share club shares / stocks and shares, share options and share club shares] in the last year after tax?

Range: 0..999997

**[CHECK IA52]**

*IF dividend income received in last year = DK, RF [laSSSi = DK, RF]*

**IASSSIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 150, 600, 15000)

[Bracket results are recoded in variables IASSSIL IASSSIU IASSSIE IASSSIR]

END OF FILTER

**IASHTYP\***

Which of the following types of shares [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have

INTERVIEWER: Read out. CODE ALL THAT APPLY.

1 ...shares in privatised industries (for example, British Telecom, British Gas or RailTrack)?

2 ...shares in demutualised building societies or other mutual societies?

3 ...shares in other UK listed companies?

4 ...shares in foreign listed companies?

[Multiple responses to IASHTYP are recoded in variables IASHTPRI IASHMUT

IASHTUKL IASHTFOL]

[code maximum 4 out of 4 possible responses]

IF bought shares in privatised industries= yes AND whether bought shares at last interview = NONRESPONSE

[(laShTyp=1) AND (ladenat (Last int) <>response)]

**IADENAT**

Did ^you /or your husband/wife buy any of these shares in privatised industries at the time they were privatised?

1 Yes - all of them

2 Yes - some of them

3 No - none of them

END OF FILTER

IF bought shares in demutualised building societies or other mutual societies AND whether bought shares at last interview = NONRESPONSE

[(laShTyp=2)AND (ladenat (Last int) <>RESPONSE)]

**IADEMUT**

Did ^you/ and your husband/wife buy or receive any of these shares in de-mutualised building societies at the time they de-mutualised?

1 Yes - all of them

2 Yes - some of them

3 No - none of them

END OF FILTER

END OF FILTER

IF savings and investments held = unit or investment trusts [laSI = 11]

**IAUIT\***

IF [^you / [^name]] chose to sell [^your / [^name's]] Unit trusts or Investment trusts today, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have?

Range: 0..9999997

**[CHECK IA53]**

*IF amount received if chose to sell = DK, RF [lauit =DK, RF]*

**IAUITB\* @**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 50000, 200000)

**[Bracket results are recoded in IAUTL IAUTU IAUTE IAUTR]**

END OF FILTER

**IAUITI\***

Not including any income that was re-invested, about how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these Unit trusts or Investment trusts in the last year after tax?

Range: 0..999997

**[CHECK IA54]**

*IF income received from unit trusts or investments = DK, RF [lauti = DK, RF]*

**IAUITIB\* @**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (150, 500, 1250, 10000)

**[Bracket results are recoded in IAUTIL IAUTIU IAUTIE IAUTIR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = bonds and gilds [laSI = 12]*

**IABG\***

IF [^you / [^name]] chose to sell [^your / [^name's]] bonds and gilts today, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have?

Range: 0..9999997

**[CHECK IA55]**

*IF (amount received If chose to sell = DK, RF) [labg = DK, RF]*

**IABGB\* @**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 40000, 100000)

**[Bracket results are recoded in IABGL IABGU IABGE IABGR]**

END OF FILTER

**IABGI\***

About how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these Bonds and Gilts in the last year after tax?

Range: 0..999997

**[CHECK IA56]**

*IF income received from bonds and gilts = DK, RF [labgi = DK, RF]*

**IABGIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 300, 1000, 50000)

**[Bracket results are recoded in IABGIL IABGIU IABGIE IAGBIR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = other [laSI = 95]*

**IASIO\***

How much in total [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in other savings or investments?

Range: 0..999999

**[CHECK IA57]**

*IF amount in other savings or investments = DK, RF [laSloI = DK, RF]*

**IASIOB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 100000)

**[Bracket results are recoded in IASIOIL IASIOIU IASIOIE IASIOR]**

END OF FILTER

**IASIOI\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these other savings or investments in the last year after tax?

Range: 0..999997

**[CHECK IA58]**

*IF amount received from other savings or investments = DK, RF [labSiOi = DK, RF]*

**IASIOIB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 150, 500, 10000)

**[Bracket results are recoded in IASIOIL IASIOIU IASIOIE IASIOIR]**

END OF FILTER

END OF FILTER

*IF (savings and investments held = RESPONSE) AND NOT (savings and investments held = none) [(laSI = RESPONSE) AND NOT (laSI = 96)]*

**IASICK\*@**

INTERVIEWER: Please check financial assets summary below:

[^CURRENT AND SAVINGS ACCOUNTS : £.....]

[^TESSA`S : £'.....]  
[^ISA`S : £.....IN CASH, £.....IN LIFE INSURANCE, £.....IN STOCKS AND SHARE's]  
[^PREMIUM BONDS : £'.....]  
[^NATIONAL SAVINGS ACCOUNTS OR CERTIFICATES : £'.....]  
[^PEPS : £'.....]  
[^STOCKS AND SHARES, SHARE OPTIONS, SHARE CLUB SHARES : £'.....]  
[^UNIT TRUSTS : £'.....]  
[^BONDS AND GILTS : £'.....]  
[^OTHER SAVINGS OR INVESTMENTS : £'.....]  
Go back and change any that are incorrect.  
1 Press <1> and <Enter>to continue.

END OF FILTER

*IF type of saving/investment<>shares in privatised industries AND bought shares at last interview = NONRESPONSE [(laShtyp <>1) AND (laden (Last int) <> response)]*

**IADEN**

Did ^[you/ or you husband/wife] ever buy any shares when the nationalised industries (for example, British Telecom, British Gas or RailTrack) were privatised?

- 1 Yes
- 2 No

END OF FILTER

*IF type of saving/investment<> shares in demutualised building societies AND ever received windfall shares at last interview = NONRESPONSE [(laShtyp <>2) AND (ladem (Last int) <> response)]*

**IADEM**

Did ^[you/ or you husband/wife] ever receive any windfall shares as a result of a demutualisation of a building society or other mutual institution?

- 1 Yes
- 2 No

END OF FILTER

**IALI\***

[^Do you / Does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] have any life insurance policies?

- 1 Yes
- 2 No

*IF whether has life insurance policies = yes [laLi = 1]*

*IF (whether partner in household = yes) AND (whether partner died less than 11 months ago <> yes) [(IAask = 1) AND (IDeadP12M <> 1)]*

**IALIW\***

Which of [^you / them] has life insurance policies?

- 1 Respondent only
- 2 Spouse / partner only
- 3 Both

END OF FILTER

*IF type of life insurance policies = respondent, both, EMPTY [laLiW = 1, 3, EMPTY]*

**IALIYA\***

How much would [^your / [^name's]] dependants get from [^your / his / her] life insurance policy or policies if [^you / [^name]] died?

Range: 0..9999997

**[CHECK IA59]**

*IF amount dependants would get from life-insurance policy = DK, RF [laLiYA = DK, RF]*

**IALIYAB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

**[Bracket results are recoded in IALIYAL IALIYAU IALIYAE IALIYAR]**

END OF FILTER

END OF FILTER

*IF type of life insurance policies = spouse / partner, both [laLiW = 2, 3]*

**IALIPA\***

How much would [^your / his / her] [^husband's / wife's / partner's] dependants get from (his / her) life insurance policy or policies if (he / she) died?

Range: 0..9999997

**[CHECK IA60]**

*IF amount partner would get from life-insurance policy = DK, RF [laLipA =DK, RF]*

**IALIPAB@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

**[Bracket results are recoded in IALIPAL IALIPAU IALIPAE IALIPAR]**

END OF FILTER

END OF FILTER

**IASC\***

Do any of [^your / [^name's] / [^your / [^name's]] and [^your / his / her] [^husband's / wife's / partner's] / [^your / his / her] [^husband's / wife's / partner's]] life insurance policy or policies have a savings component?

INTERVIEWER: That is the value of the fund will be paid at some point in the future.

1 Yes

2 No

*IF whether life insurance policies with savings component = yes [laSC = 1]*

**IASCA\***

About how much in total will (this / these) savings component(s) yield when (it / they) mature(s)?

Range: 0..9999997

**[CHECK IA61]**

*IF amount savings component(s) would yield = DK, RF [laSCA =DK, RF]*

**IASCAB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 25000, 50000, 250000)

**[Bracket results are recoded in IASCAL IASCAU IASCAE IASCAR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (savings and investments held = RESPONSE) AND NOT (savings and investments held = none)  
[(laSI = RESPONSE) AND NOT (laSI = 96)]*

**IADOC\***

INTERVIEWER: Code whether respondent consulted documents when answering the financial assets questions.

- 1 Respondent consulted documents frequently
- 2 Respondent consulted documents occasionally
- 3 Respondent did not consult documents

**IAINTA \***

INTERVIEWER: How accurate do you think the answers given by the respondent were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

END OF FILTER

**IAPROP\* @**

SHOW CARD F4

Which, if any, of these assets [^do you / does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] have, not including [^your / his / her / their] own home?

PROBE: What others? CODE ALL THAT APPLY.

1 Houses, flats or holiday homes, including timeshares (not including this home)

2 Farm or Business Property (such as a shop, warehouse or garage)

3 Other land

4 Money owed to you by others

5 A trust

6 A covenant or inheritance

95 Other assets (including works of art or collectibles such as antiques or jewellery)

96 None of these

**[Multiple responses to IAPROP are recoded in variables IAPROPHO IAPROPFA IAPROPOL  
IAPROPOW IAPROPTR IAPROPIN IAPROP95 IAPROP96]**

**[code maximum 7 out of 8 possible responses]**

**[CHECK IA62]**

*IF assets owned = houses, flats or holiday homes [laprop = 1]*

**IAHOME\***

If [^you / [^name]] chose to sell [^your / his / her] [^BLANK / other] house or holiday home and then paid off any debts on it, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] get?

Range: 0..9999997

**[CHECK IA63]**

*IF amount received if chose to sell = DK, RF [laHome = DK, RF]*

**IAHOMEB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 250000)

**[Bracket results are recoded in IAHOMEI IAHOMEU IAHOMEE IAHOMEF]**

END OF FILTER

**IAIR\***

Did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive any income or rent from that property in the last year?

1 Yes

2 No

*IF whether received any income or rent last year = yes [lair = 1]*

**IAIRA\***

How much income or rent did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

**[CHECK IA64]**

*IF income or rent received from property last year = DK, RF [laira = DK, RF]*

**IAIRB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

**[Bracket results are recoded in IAIRAL IAIRAU IAIRAE IAIRAR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF assets owned = farm or business property [laprop = 2]*

**IAFBPS\***

If [^you / [^name]] sold [^your / his / her] Farm or Business property and then paid off any debts on it, about how much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] get?

Range: 0..9999997

**[CHECK IA65]**

*IF amount received if sold Farm or Business property = DK, RF [/lafbps = DK, RF]*

**IAFBPSB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 500000)

**[Bracket results are recoded in IAFBPSL IAFBPSU IAFBPSE IAFBPSR]**

END OF FILTER

**IAFBPR\***

Did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive any income or rent from that property in the last year?

1 Yes

2 No

*IF whether income or rent received in last year = yes [/lafbpr = 1]*

**IAFBA\***

How much income or rent did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

**[CHECK IA66]**

*IF income received from property in last year = DK, RF [/lafBA = DK, RF]*

**IAFBAB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

**[Bracket results are recoded in IAFBAL IAFBPAU IAFBPAE IAFBPAR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF assets owned = other land, money owed by others, a trust, a covenant or inheritance, other assets [/laprop = 3, 4, 5, 6, 95]*

**IAOASA\***

How much is [^the other land / the money owed to you by others / the trust / the covenant or inheritance / the other land and the money owed to you by others / the other land and the trust / the other land and the covenant or inheritance etc.] worth?

Range: 0..9999997

**[CHECK IA67]**

*IF amount it is worth = DK, RF [/laOasA = DK, RF]*

**IAOASAB\*@**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (5000, 7500, 20000, 100000)

**[Bracket results are recoded in IAOASAL IAOASAU IAOASAE IAOASAR]**

END OF FILTER

END OF FILTER

### IAREGP\*

Apart from anything you have already told me about, did [^you / [^name]] receive any regular payments from people not living here in the past year (that is since [^date a year ago])?

1 Yes

2 No

*IF whether regular payments from people outside household in past year = yes [laregp = 1]*

*LOOP FOR UP TO FOUR PAYMENTS*

*IF (payment = 1) OR (whether received other regular payments = yes) [(k = 1) OR (IaOthP = 1)]*

### IAPAY\*

Thinking about [^your / [^name's]] [^first / second / third / next] payment who was it from?

01 Husband / Wife

02 Ex-husband / wife / partner

03 Son / Daughter

04 Son / Daughter-in-law

05 Parent

06 Parent-in-law

07 Brother / Sister

08 Brother / Sister-in-law

09 Grandchild

10 Other relative

11 Other non-relative

12 Local Authority

13 Publisher

**[Responses for loops two to four are recoded in IAPAY2 to IAPAY4]**

### IAPAYR\*

What was the reason for this payment?

CODE ONE ONLY.

1 Financial support for children

2 Household bills / expenses

3 Spending money / allowance

4 Loan repayment

5 Maintenance or alimony

6 Royalties

95 Other (specify)

**[Responses for loops two to four are recoded in IAPAYR2 to IAPAYR4]**

*IF reason for payment = other [lapayr = 95]*

### IAPAYO\*@

INTERVIEWER: Enter other reason.

String 60

*[Open responses to IAPAYO were coded and then incorporated into IAPAYR.  
IAPYRC identifies that an open response was given at IAPAYO and incorporated  
into IAPAYR]*

END OF FILTER

**IAREGO\***

What period did [^your / [^name's]] usual payments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*[Responses for loops two to four are recoded in IAREGO2 to IAREGO4]*

*IF periods payments covered = RESPONSE [larego = RESPONSE]*

**IAREGM\***

And about how much did [^you / [^name]] usually receive?

Range: 0..9999997

*[Responses for loops two to four are recoded in IAREGM2 to IAREGM4]*

**[CHECK IA68]**

END OF FILTER

*IF (periods payments covered = DK, RF) OR (amount usually received = DK, RF)  
[(larego = DK, RF) OR (laregm = DK, RF)]*

*IF periods payments covered = one week [larego = 1]*

**IAREGMWB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 50, 100, 2000)

*[Bracket results are recoded in IARGWL IARGWU IARGWE IARGWR to IARG4WL  
IARG4WU IARG4WE IARG4WR]*

*ELSE IF periods payments covered = two weeks [larego = 2]*

**IAREGMFB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 200, 4000)

*[Bracket results are recoded in IARGFL IARGFU IARGFE IARGFR to IARG4FL]*

**IARG4FU IARG4FE IARG4FR]**

*ELSE IF periods payments covered = four weeks, one month [larego = 4, 5]*

**IAREGMMB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in in IARGML IARGMU IARGME IARGMR to IARG4ML IARG4MU IARG4ME IARG4MR]**

*ELSE IF periods payments covered = one year, lump sum [larego = 52, 95]*

**IAREGMYB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1250, 2500, 5000, 100000)

**[Bracket results are recoded in in IARGYL IARGYU IARGYE IARGYR to IARG4YL IARG4YU IARG4YE IARG4YR]**

ELSE

**IAREGMOB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in in IARGOL IARGOU IARGOE IARGOR to IARG4OL IARG4OU IARG4OE IARG4OR]**

END OF FILTER

END OF FILTER

**IARGYR1\*, IARGMW\*, IARMWA\* removed**

**IAOTHP\***

Did [^you / [^name]] receive any other regular payments from people not living here in the past year?

1 Yes

2 No

**[Responses for loops two to four are recoded in IAOTHP2 to IAOTHP4]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (whether partner in household = yes) AND (continued with module IA = continued)  
[(IAask = 1) AND (IAIntro = 1)]*

**IAPAR\***

Apart from anything you have already told me about, did [^you/ [^ name] (or) / [^your / his / her] [^husband / wife / partner]] receive any regular payments from people not living here in the past year (that is since [^date a year ago])?

1 Yes

2 No

*IF whether received other regular payments = yes [lapar = 1]*

*LOOP FOR UP TO FOUR PAYMENTS*

*IF (payment = 1) OR (whether received other regular payments from outside household in last year = yes) [(k = 1) OR (laMrP = 1)]*

**IAPS\***

Thinking about [^your/ [^ name]’s (or) / [^your / his / her] [^husband / wife / partner]’s payment who was it from?

- 01 Husband / Wife
- 02 Ex-husband / wife / partner
- 03 Son / Daughter
- 04 Son / Daughter-in-law
- 05 Parent
- 06 Parent-in-law
- 07 Brother / Sister
- 08 Brother / Sister-in-law
- 09 Grandchild
- 10 Other relative
- 11 Other non-relative
- 12 Local authority
- 13 Publisher

**[Responses for loops two to four are recoded in IAPS2 to IAPS4]**

**IAPR\***

What was the reason for this payment?

CODE ONE ONLY.

- 1 Financial support for children
- 2 Household bills / expenses
- 3 Spending money / allowance
- 4 Loan repayment
- 5 Maintenance or Alimony
- 6 Royalties
- 95 Other (specify)

**[Responses for loops two to four are recoded in IAPR2 to IAPR4]**

*IF reason for payment = other [laPR = 95]*

**IAPARO\*@**

INTERVIEWER: Enter other reason.

String 60

**[Open responses to IAPARO were coded and then incorporated into IAPR.]**

***IAPRC identifies that an open response was given at IAPARO and incorporated into IAPR]***

END OF FILTER

**IAPF\***

What period did [^your/ [^ name]’s (or) / [^your / his / her] [^husband / wife / partner]’s usual payments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks

04 Four weeks  
05 Calendar month  
07 Two Calendar months  
08 Eight times a year  
09 Nine times a year  
10 Ten times a year  
13 Three months / 13 weeks  
26 Six months / 26 weeks  
52 One Year / 12 months / 52 weeks  
90 Less than one week  
95 One off / lump sum  
96 None of these (EXPLAIN IN A NOTE)

**[Responses for loops two to four are recoded in IAPF2 to IAPF4]**

*IF period usual payments covered = RESPONSE [lapf = RESPONSE]*

**IAPAM2\***

And about how much did [^your/ [^ name]’s (or) / [^your / his / her] [^husband / wife / partner]’s] usually receive?

Range: 0..999997

**[Responses for loops two to four are recoded in IAPAM3 to IAPAM5]**

END OF FILTER

*IF (period usual payments covered = DK, RF) OR (state pension amount = DK, RF)  
[(lapf = DK, RF) OR (lapam = DK, RF)]*

*IF period usual payments covered = one week [lapf = 1]*

**IAPWB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (25, 50, 100, 2000)

**[Bracket results are recoded in IAPA2WL IAPA2WU IAPA2WE IAPA2WR TO  
IAPA5WL IAPA5WU IAPA5WE IAPA5WR]**

*ELSE IF period usual payments covered = two weeks [lapf = 2]*

**IAPFB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (50, 100, 200, 4000)

**[Bracket results are recoded in IAPA2FL IAPA2FU IAPA2FE IAPA2FR to  
IAPA5FL IAPA5FU IAPA5FE IAPA5FR]**

*ELSE IF period usual payments covered = four weeks, one month [lapf = 4, 5]*

**IAPMB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in IAPA2ML IAPA2MU IAPA2ME IAPA2MR to  
IAPA5ML IAPA5MU IAPA5ME IAPA5MR]**

*ELSE IF period usual payments covered = one year, lump sum [lapf = 52, 95]*

**IAPYB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (1250, 2500, 5000, 100000)  
**[Bracket results are recoded in IAPA2YL IAPA2YU IAPA2YE IAPA2YR to  
IAPA5YL IAPA5YU IAPA5YE IAPA5YR]**

ELSE

**IAPOB\*@**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in IAPA2OL IAPA2OU IAPA2OE IAPA2OR to  
IAPA5OL IAPA5OU IAPA5OE IAPA5OR]**

END OF FILTER

END OF FILTER

#### **IAREGYRP\*@, IAREGMWP\*@, IARMWPA\* REMOVED**

**IAMRP\***

Did [^you/ [^ name] (or) / [^you / his / her] [^husband / wife / partner]] receive any other regular payments from people not living here in the past year?

1 Yes

2 No

**[Responses for loops two to four are recoded in IAMRP2 to IARMP4]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IAPK\* @**

SHOW CARD F5

Which, if any, of these payments and payments in kind [^did / have / has] [^your / his / her] [^husband / wife / partner] / [^partner's name] / [^you / [^name]] or [^partner's name] [^receive / received] [^in the last two years/ since the last interview, that is since [^last interview date]]?

PROBE: What others?

CODE ALL THAT APPLY.

- 1 Life insurance policy
- 2 Lump sum pension payout
- 3 Personal Accident plan
- 4 Other insurance payment
- 5 Redundancy payment
- 6 Inheritance or bequest (inc. inherited property)
- 7 Win(s) on the football pools, national lottery or other form of gambling
- 8 Substantial gift of money or in kind; that is one exceeding £1000
- 95 Other payment (SPECIFY)
- 96 None of these

**[Multiple responses to IAPK are recoded in variables IAPKLI IAPKPP IAPKPAP IAPKOIP IAPKRP  
IAPKIOB IAPKGW IAPK95 IAPK96]**

**[code maximum 8 out of 9 possible responses]**

### [CHECK IA69]

*IF (payments received in last year = other) AND (whether post-interview editing question <> yes OR (payments received in last year = [EMPTY, other]))*  
[(lapk = 95) AND (EditQre <> 1 OR (lapkz = [EMPTY, 95]))]

**IAPKO\*@**

INTERVIEWER: Write in source of other payment.

String 20

**[Open responses to IAPKO are coded and merged with the multiple responses to IAPK.  
These merged responses are recoded in variables IAPKMLI IAPKMPP IAPKMAP  
IAPKMIP IAPKMRP IAPKMOB IAPKMGW IAPKM85 IAPKM86 IAPKM96]**

END OF FILTER

### [CHECK IA70]

*IF (payments received in last year = RESPONSE) AND NOT (payments received in last year = none)*  
[(lapk = RESPONSE) AND NOT (lapk = 96)]

LOOP FOR n:= 1 TO 8

*IF payments received in last year = n95loop [lapk = n95loop]  
(Questions below are repeated for every payment reported in IAPK)*

**IAPKM\*@**

How much in total did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] [^receive from the [^Life insurance policy / lump sum pension payout / Personal Accident Plan / Other Insurance Payment / Redundancy payment / inheritance or bequest / other payment] / win on the football pools, national lottery or other form of gambling]?  
Range: 0..999997

**[Responses for each payment received (at IAPK) are recoded in variables IAPKM1 to IAPKM8]**

*IF (payment received in total = DK, RF) [lapkm = DK, RF]*

**IAPKMB\* @**

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 5000, 15000, 50000)

**[Bracket results are recoded in IAPKM1L IAPKM1U IAPKM1E IAPKM1R TO  
IAPKM8L IAPKM8U IAPKM8E IAPKM8R]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IADEBT\***

I would like to ask you about any other financial commitments [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] may have apart from mortgages or housing related loans. [^Do you /

Does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] currently owe any money on credit or store cards?

INTERVIEWER: Record No if respondent pays off the balance on their credit or store cards each month.

1 Yes

2 No

*IF whether owes money on credit or store cards = yes [/adebt = 1]*

**IADEBM\***

How much was the outstanding balance on these cards after the last monthly payment was made?

Range: 0..99997

**[CHECK IA71 - IA72]**

*IF amount of outstanding balance on cards = DK, RF [/adebm = DK, RF]*

**IADEBMB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

**[Bracket results are recoded in IADEBML IADEBMBU IADEBMBE IADEBMBR]**

END OF FILTER

END OF FILTER

**IAOWE\***

[^Do you / Does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] currently owe any money to friends, relatives, or other private individuals?

1 Yes

2 No

*IF whether currently owes money to someone = yes [/aowe = 1]*

**IAOWEM\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] owe?

Range: 0..99997

**[CHECK IA73]**

*IF amount owed = DK, RF [/aowem = DK, RF]*

**IAOWETB\*@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

**[Bracket results are recoded in IAOWEML IAOWEMU IAOWEME IAOWEMR]**

END OF FILTER

**IAREGR\***

[^Do you / Does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] make regular repayments on these loans?

1 Yes

2 No

*IF whether makes regular payments on these loans = yes [laRegR = 1]*

**IAREGRP\***

What period do these repayments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF period repayments cover = RESPONSE [laRegRP = RESPONSE]*

**IAREP\***

How much are [^your / [^name's]] usual repayments?

Range: 0..9997

**[CHECK IA74]**

END OF FILTER

*IF (period repayments cover = DK, RF) OR (amount of usual repayments = DK, RF)  
[(laRegRP = DK, RF) OR (larep = DK, RF)]*

*IF period repayments cover = one week [laRegRP = 1]*

**IARPWB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10, 20, 50, 150)

**[Bracket results are recoded in IAREPWL IAREPWU IAREPWE IAREPWR]**

*ELSE IF period repayments cover = two weeks [laRegRP = 2]*

**IARPFB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (20, 40, 100, 300)

**[Bracket results are recoded in IAREPFL IAREPFU IAREPFE IAREPFR]**

*ELSE IF period repayments cover = four weeks, one month [laRegRP = 4, 5]*

**IARPMB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IAREPML IAREPMU IAREPME IAREPMR]**

ELSE IF period repayments cover = one year, lump sum [laRegRP = 52, 95]

**IARPYB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (500, 1000, 2500, 7500)

**[Bracket results are recoded in IAREPYL IAREPYU IAREPYE IAREPYR]**

ELSE

**IARPOB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IAREPOL IAREPOU IAREPOE IAREPFOR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IALOAN\* @**

SHOW CARD F6

On which, if any, of these [^do you / does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] currently owe money?

PROBE: What others? CODE ALL THAT APPLY.

1 Hire purchase agreements

2 Personal loans (from bank, building society or other financial institution)

3 Overdraft

4 Catalogue or mail order purchase agreements

5 DWP social fund loan

6 Loan from a money lender or 'tally man'

96 None of these

**[Multiple responses to IALOAN are recoded in variables IALOANHP IALOANPL IALOANOD**

**IALOANMO IALOANSF IALOANML IALOAN96]**

**[code maximum 6 out of 7 possible responses]**

**[CHECK IA75]**

IF (owes money on following = RESPONSE) AND NOT (owes money on following = none)

[(laloan = RESPONSE) AND NOT (laloan = 96)]

**IALOAM\***

How much in total [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] owe on these loans?

Range: 0..99997

**[CHECK IA76]**

IF (total amount owed on loans = DK, RF) [laloam = DK, RF]

**IALOAMB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

**[Bracket results are recoded in IALOAML IALOANMU IALOANME IALOANMR]**

END OF FILTER

*IF NOT ((laloan.CARDINAL = 1) AND (owes money on following = overdraft))  
[NOT ((laloan.CARDINAL = 1) AND (laloan = 3))]*

**IALREP\***

What period [^do / does] [^your / [^name's]] [^BLANK / and [^your / his / her] [^husband's / wife's / partner's]] usual repayments on these loans cover?

INTERVIEWER: If doesn't make repayments, code 97.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)
- 97 Doesn't make repayments

*IF (periods usual repayments cover = RESPONSE) AND (periods usual repayments cover = doesn't make repayments)*

*[(lalreP = RESPONSE) AND (lalreP = 97)]*

**IALRE\***

How much [^are / is] [^your / [^name's]] usual repayments on these loans?

Range: 0..99997

**[CHECK IA77]**

END OF FILTER

*IF (periods usual repayments cover = DK, RF) OR (amount of usual repayments on loans = DK, RF)  
[(lalreP = DK, RF) OR (lalre = DK, RF)]*

*IF period usual repayments cover = one week [lalreP = 1]*

**IALRPWB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10, 20, 50, 150)

**[Bracket results are recoded in IALREWL IALREWU IALREWE IALREWR]**

*ELSE IF period usual repayments cover = two weeks [lalreP = 2]*

**IALRPFB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (20, 40, 100, 300)

**[Bracket results are recoded in IALREFL IALREFU IALREFE IALREFLR]**

*ELSE IF period usual repayments cover = four weeks, one month [lalreP = 4, 5]*

**IALRPMB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IALREML IALREMU IALREME IALREFMR]**

*ELSE IF period usual repayments cover = one year, lump sum [lalreP = 52, 95]*

**IALRPYB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (500, 1000, 2500, 7500)

**[Bracket results are recoded in IALREYL IALREYU IALREYE IALREYR]**

*ELSE*

**IALRPOB\*@**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IALREOL IALREOU IALREOE IALREOR]**

*END OF FILTER*

*END OF FILTER*

*END OF FILTER*

*END OF FILTER*

*IF whether there is a couple in the household>0 [ICoupleN > 0]*

**IAJNT\***

Can I just check, [^do you / does [^name]] have any savings, investments, property or other assets that are held jointly with [^your / [^name's]] [^husband / wife / partner]?

1 Yes

2 No

*IF whether holds assets jointly with partner = yes [IaJnt = 1]*

**IAAM\***

About how much would [^your / [^name's]] personal share amount to, minus share of any joint debts [^you and your / [^name] and [^name's]] [^husband / wife / partner] might have?  
Range: 0..999997

**[CHECK IA78]**

*IF amount of personal share = DK, RF [IaAm = DK, RF]*

**IAAMB\*@**

Would it amount to less than [^amount], more than [^amount] or what?  
BRACKETS (1000, 2500, 10000, 50000)

**[Bracket results are recoded in IAAML IAAMU IAAME IAAMLR]**

END OF FILTER

END OF FILTER

END OF FILTER

**IAIGI**

We are interested in any gifts and inheritances [[^you/name] [^and/or] [[husband/wife/partner's name]/[^your/his/her] [^husband/wife/partner]]] may have received over [^your/his/her] lifetime.  
First we will ask about inheritances and then we will ask separately about gifts [^you/he/she] may have received.

INTERVIEWER ONLY IF NECESSARY: An inheritance is received after the death of the giver.

Gifts are received during the giver's lifetime.

Press <1> and <Enter> to continue

**IAI**

[^Have/has [^you/name] [^and/or] [[husband/wife/partner's name]/[^your/his/her] [^husband/wife/partner]]] ever received an inheritance or been given substantial assets in the form of a trust?

INTERVIEWER NOTE: Please do include inheritances already mentioned at IAPk

INTERVIEWER NOTE: Do not include inheritances given directly to the respondent's children

01 Yes

02 No

*IF received an inheritance = yes [Ial = 1]*

**IAIN**

How many such inheritances or trusts [^have/has] [[^you/name] [^and/or] [[husband/wife/partner's name]/[^your/his/her] [^husband/wife/partner]]] received in total?

ENTER number

RANGE: 1..97

*LOOP UP TO 3 TIMES*

*IF couple with joint finances = yes [IAAsk = 1]*

**IAIWH**

Thinking about the [^largest/next largest] inheritance or trust, was [[^you/name] [^and/or] [[husband/wife/partner's name]/[^your/his/her] [^husband/wife/partner]]] who received this, or was it given to both jointly?

INTERVIEWER: IF INHERITANCE WAS RECEIVED JOINTLY WITH A FORMER HUSBAND/WIFE/PARTNER THEN THE CORRECT ANSWER IS RESPONDENT

01 [^respondent's name]

02 [^husband/wife/partner's name]

03 Both/jointly

*If not joint finances and in a couple ELSE/IF [(IAAsk = 2) AND (Icouplen[pnum]>0)]*

**IAIJ**

[Thinking about the [^largest/next largest] inheritance or trust, was this inheritance received by [[^you/name] alone or jointly with [^husband/wife/partner's name]]?

- 01 just [^respondent's name]
- 02 jointly with [^husband/wife/partner's name]

END OF FILTER

**IAIWN**

[Thinking about the [^largest/next largest] inheritance or trust, when/ When] did [[^you/name] [^and/or] [[^husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]] receive this inheritance?

INTERVIEWER SELECT WHETHER ANSWER GIVEN AS YEAR OR AGE

- 01 Year
- 02 Age

*IF when received inheritance = year [laiwn =1]*

**IAIY**

ENTER YEAR

INTERVIEWER NOTE: Please enter approximate date or mid-point of a decade if the respondent is uncertain.

RANGE: 1900..2020

**[CHECK IA79]**

*ELSE IF when received inheritance [laiwn = 2]*

**IAIAG**

ENTER AGE WHEN INHERITANCE RECEIVED

ENTER AGE OF THE PERSON RECEIVING THE INHERITANCE AT THE TIME THEY RECEIVED IT.

INTERVIEWER NOTE: if the respondent received it jointly with their partner, they should give us the AGE that THE RESPONDENT WAS when he or she received the inheritance.

INTERVIEWER NOTE: Please enter approximate age or mid-point of a decade if the respondent is uncertain.

RANGE : 0..120

**[CHECK IA80-81]**

END OF FILTER

**IAIW**

From whom did [[^you/name] [^and/or] [[^husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]] receive this inheritance or trust?

INTERVIEWER NOTE: This inheritance was received JOINTLY with the respondent's spouse/partner, please record the relationship to the RESPONDENT/ This inheritance was received by the respondent's spouse/partner. Please record the relationship of the donor to the SPOUSE/PARTNER

- 01 Grandparent
- 02 Parent
- 03 Parent-in-law
- 04 Child

- 05 Aunt/uncle
- 06 Respondent's sibling
- 07 Husband/wife/partner's sibling
- 08 Husband/wife/partner/ex-spouse
- 09 Other

*/F relationship of inheritance donor = other [laiwm=9]*

**IAIWMX**

Enter other response

END OF FILTER

**IAIV**

What was [^your/his/her share of] the value of this inheritance or trust at the time that  
[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her]  
[^husband/wife/partner]] received it?

INTERVIEWER NOTE: If inheritance was in the form of property, please ask respondent to estimate the value when they received it, rather than when it was eventually sold.

[^BLANK/INTERVIEWER NOTE: If respondent unable to separate out their share of the inheritance, please ask them to split it in half]

ENTER amount to nearest £

RANGE: 1..999999997

*/F inheritance amount = NONRESPONSE [iaiv = NONRESPONSE]*

**IAIVB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 50000, 100000, 500000)

ENDIF

END OF FILTER

END OF FILTER

**IAG**

[^Have/has [^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her]  
[^husband/wife/partner]]] ever received any substantial gifts. That is, ones that were worth more than about £1,000 in today's money?

INTERVIEWER NOTE: £1,000 in today's money is equivalent to approximately £20 in the 1920s and 1930s, £30 in the 1940s, £45 in the 1950s, £65 in the 1960s, £130 in the 1970s, £400 in the 1980s and £650 in the 1990s.

INTERVIEWER NOTE: Do not include gifts given directly to the respondent's children, or given solely for the benefit of the respondent's children

01 Yes

02 No

*/F received substantial gift = yes [IAG = 1]*

**IAGN**

How many such gifts ^havehas[pnum] [[^you/name] [^and/or] [[husband/wife/partner's name]/  
[^your/his/her] | [^husband/wife/partner]]] received in total?

ENTER number.

RANGE: 0..97

LOOP UP TO 3 TIMES

IF couple with joint finances = yes [IAAsk = Yes]

**IAGWH**

Thinking about the [^largest/next largest] gift, was it [^you/[^name]] who received this, or was it given to [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]] jointly?

INTERVIEWER: IF GIFT WAS RECEIVED JOINTLY WITH A FORMER HUSBAND/WIFE/PARTNER THEN THE CORRECT ANSWER IS RESPONDENT

- 01 [^respondent's name]
- 02 [^husband/wife/partner's name]
- 03 Both/jointly

If not joint finances and in a couple ELSEIF [(IAAsk = 2) AND (lcouplen[pnum]>0)]

**IAGJ**

Thinking about the [^largest/next largest] gift, was this gift received by [^you/name]] alone or jointly with [^husband/wife/partner's name]?

- 01 just [^respondent's name]
- 02 jointly with [^husband/wife/partner's name]

END OF FILTER

**IAGWN**

[^Thinking about the [^largest/next largest] gift, when/ When] did [^your/his/her [husband/wife/partner]]/[^you/[^name]] receive this gift?

- 01 Year
- 02 Age

IF when received gift = year [IAGWn=1]

**IAGY**

ENTER YEAR

INTERVIEWER NOTE: Please enter approximate date or mid-point of a decade if the respondent is uncertain.

RANGE: 1900..2020

**[CHECK IA82]**

ELSEIF when received gift = age [IAGWn = 2]

**IAGAG**

ENTER AGE WHEN GIFT RECEIVED

/ENTER AGE OF THE PERSON RECEIVING THE GIFT AT THE TIME THEY RECEIVED IT.

INTERVIEWER NOTE: if the respondent received it jointly with their partner, they should give us the AGE that THE RESPONDENT WAS when he or she received the inheritance.

INTERVIEWER NOTE: Please enter approximate age or mid-point of a decade if the respondent is uncertain.

RANGE: 0..120

**[CHECKS IA83-84]**

END OF FILTER

**IAGWM**

From whom did [[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]] receive this gift?

INTERVIEWER NOTE: This gift was received JOINTLY with the respondent's spouse/partner, please record the relationship to the RESPONDENT/ This inheritance was received by the respondent's spouse/partner. Please record the relationship of the donor to the SPOUSE/PARTNER

01 Grandparent

02 Parent

03 Parent-in-law

04 Child

05 Aunt/uncle

06 Respondent's sibling

07 Husband/wife/partner's sibling

08 Husband/wife/partner/ex-spouse

09 Other

*IF gift donor = other [IAGWm=9]*

**IAGMX**

Enter other response

END OF FILTER

**IAGV**

What was [^your/his/her share of] the value of this gift at the time that [[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her][^husband/wife/partner]] received it?

INTERVIEWER NOTE: If gift was in the form of property, please ask respondent to estimate the value when they received it, rather than when it was eventually sold.

INTERVIEWER NOTE: If gift was in the form of property, please ask respondent to estimate the value when they received it, rather than when it was eventually sold.

[^BLANK/INTERVIEWER NOTE: If respondent unable to separate out their share of the gift, please ask them to split it in half]

ENTER amount to nearest £

RANGE: 1..999999997

*IF gift amount = NONRESPONSE [iagv = NONRESPONSE]*

**IAGVB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2000, 5000, 10000, 50000)

ENDIF

END OF FILTER

END OF FILTER

ASK ONCE ONLY

*IF ((AskPay=0) OR (AskPay=allocp[pnum]) OR (lcouple[pnum]= EMPTY)) AND laLoan<>EMPTY*

**IAFCON\*****SHOW CARD F7**

Which of the phrases on the card best describes how [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] [^are / is] getting along financially these days?

- 1 manage very well
- 2 manage quite well
- 3 get by alright
- 4 don't manage very well
- 5 have some financial difficulties
- 6 have severe financial difficulties

*IF (marital status from household grid = married, cohabiting) and (where partner living <> elsewhere) [(ICouple = [1, 2]) and (DMWhat <> elsewhere)]*

**IAORGF****SHOW CARD F8**

People organise their family finances in different ways. Which of the methods on this card comes closest to the way you organise yours. It doesn't have to fit exactly - just choose the nearest one. You can just tell me the number which applies.

CODE ONE ONLY.

- 1 I look after all the household money except my partner's personal spending money
- 2 My partner looks after all the household money except my personal spending money
- 3 I am given a housekeeping allowance. My partner looks after the rest of the money
- 4 My partner is given a housekeeping allowance. I look after the rest of the money
- 5 We share and manage our household finances jointly
- 6 We keep our finances completely separate
- 95 Some other arrangement

*IF method of organising finances = some other arrangement [laorgf = 95]*

**IAORGD@**

INTERVIEWER: Please record details.

String 60

*[Open responses to IAORGD were coded and then incorporated into IAORGF.*

*IAORGD identifies that an open response was given at IAFINW and incorporated into IAFIND]*

END OF FILTER

**IAFIND**

In your household who has the final say in big financial decisions?

DO NOT PROMPT. CODE ONE ONLY.

- 1 Respondent
- 2 Partner
- 3 Both have equal say
- 95 Other

*IF person with final say = other [lafind = 95]*

**IAFINW@**

INTERVIEWER: Write in other answer.

String 20

*[Open responses to IAFINW were coded and then incorporated into IAFINW.*

*IAFINW identifies that an open response was given at IAFINW and incorporated into IAFIND]*

END OF FILTER  
END OF FILTER  
END OF FILTER

### **IAHHINC**

Other household members make an important contribution to overall finances in some households. In order to understand your household situation better we would like to collect some very brief summary information about the financial circumstances of ^[names of adults aged 16 and over in the household]. INTERVIEWER: Press <1> and <Enter> to continue

- 1 Continue
- 2 SPONTANEOUS: Respondent absolutely refuses outright to answer these questions

### **[CHECK IA85]**

*IF household income permission = Respondent refuses [IAHHInc=2]*

#### **IAHHINCR @**

INTERVIEWER: Please explain why the respondent is refusing to answer these questions  
STRING[100]

*ELSE*

*LOOP FOR hloop:= 1 TO 16*

*IF Indstat[hloop] < 1 AND DMPres[hloop]=Yes AND DMAge[hloop] >= 16*

#### **IAPAYW\* @**

During the last year did [^person name] do any work for pay?

- 1 Yes
- 2 No

**[There is a separate variable for responses about each person. Responses are recoded in IAPAYW, IAPAYW2 to IAPAYW16.]**

*IF whether did paid work during last year = yes [lapayw = 1]*

#### **IAERN**

About how much money did [^person name] earn from all jobs in the last year, before any tax or other deductions?

- 1 Continue

#### **IAEARNB@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 35000, 100000)

**[Bracket results are recoded in IAEARL, IAEARU, IAEARE, IAEARR and for the second loop in IAEAR2L to IAEAR16R]**

END OF FILTER

END OF FILTER

END OF FILTER

**IABENR**

Not including any job income, did ^[names of other household members] receive anything in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

1 Yes

2 No

*IF other household member receiving non-work income = yes [IABENR = 1]*

**IAREC**

Not including any job income, about how much in total did [^name] [^BLANK / and ^name] receive in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

Range: 0..999997

**IARECB@**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (250, 500, 1000, 5000)

**[Bracket results are recoded in IARECL, IARECU, IARECE, IARECR]**

END OF FILTER

**IAOM**

(Do / does) [^name] [^BLANK / and [^name]] have more than £1,000 total in bank accounts, other financial assets, vehicles, property, or other investments?

1 Yes

2 No

*IF whether have / has more than £2,500 = yes [iaom = 1]*

**IAOMM**

About how much altogether would that amount to, minus any debts he / she / they might have?

Range: 0..999997

**[(iaomm = DK, RF)]**

**IAOMMB@**

Would it amount to less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 150000)

**[Bracket results are recoded in IAOMML, IAOMMU, IAOMME, IAOMMR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IAX@**

INTERVIEWER: The Income and Assets section is finished.

Please enter 1 here to make the program store the current time and date.

Range: 1..1

## **IA Module Checks**

### **IA1 IASINC**

*IF (wage and salary income = RESPONSE) [IASinc = RESPONSE]*

*CHECK: wage and salary income<=20000 [IASinc <=20000]*

*INTERVIEWER: Are you sure? £^IASinc seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA2-IA3 IASPW**

*IF who received state pension = response, both [laspW =response, both]*

*CHECK: (whether resp at retirement age <> No) IN (who received state pension) [(tmprage<>No) INVOLVING(laspw)]*

*INTERVIEWER: Respondent says they are receiving the state pension before the age of retirement, please check.*

*END CHECK*

*CHECK: (whether resp at retirement age <> No) IN (who received state pension) [(tmprage<>No) INVOLVING(laspw)]*

*INTERVIEWER: Respondent says they are receiving the state pension before the age of retirement, please check.*

*[(^dmname[icouplen[pnum]] is only ^dimage[icouplen[pnum]])]*

*END CHECK*

*END OF FILTER*

### **IA4 IAPAM**

*IF (state pension amount = RESPONSE) AND (state pension amount <>99997) [laPam=RESPONSE AND laPam<>99997]*

*CHECK: ((period covered by state pension = oneWeek AND state pension amount <= 300) OR (period covered by state pension = twoWeek AND state pension amount <= 600) OR (period covered by state pension IN [fourWeek, onemonth] AND state pension amount <= 1200) OR (period covered by state pension IN [Thrweek, Twomonth..sixmonth, oneyear, lessweek..lumpsum] AND state pension amount <= 15000))*

*[((laSPa=oneWeek AND laPam <= 300) OR (laSPa=twoWeek AND laPam <= 600) OR (laSPa IN [fourWeek, onemonth] AND laPam <= 1200) OR (laSPa IN [Thrweek, Twomonth..sixmonth, oneyear, lessweek..lumpsum] AND laPam <= 15000))]*

INTERVIEWER: Are you sure? £^laPam seems high - please check.  
END CHECK  
END OF FILTER

#### IA5 IAPPAM

*IF (partner's state pension amount=RESPONSE AND partner's state pension amount <> 99997)  
[laPPam=RESPONSE AND laPPam<>99997]*

*CHECK: (whether resp at retirement age <>No) IN (who received state pension)  
((period covered by partner's state pension = oneWeek AND partner's state pension  
amount <= 300) OR (period covered by partner's state pension = twoWeek AND  
"partner's state pension amount" <= 600) OR (period covered by partner's state  
pension IN [fourWeek, onemonth] AND partner's state pension amount <= 1200) OR  
(period covered by partner's state pension IN [Thrweek, Twomonth.. sixmonth, oneyear, lessweek..  
lumpsum] AND partner's state pension amount <= 15000))  
[((laSPp=oneWeek AND laPPam <= 300) OR (laSPp=twoWeek AND laPPam <= 600)  
OR (laSPp IN [fourWeek, onemonth] AND laPPam <= 1200) OR (laSPp IN  
[Thrweek, Twomonth.. sixmonth, oneyear, lessweek.. lumpsum] AND laPPam <= 15000))]*

INTERVIEWER: Are you sure? £^laPPam seems high - please check.  
END CHECK  
END OF FILTER

#### IA6 IAPPEI

*IF (amount received personal or employer pensions = RESPONSE) [laPPel=RESPONSE]*

*CHECK: amount received personal or employer pensions <= 60000  
[laPPel <= 60000]*

INTERVIEWER: Are you sure? £^laPPel seems high - please check.  
END CHECK  
END OF FILTER

#### IA7 IAAIM

*IF annuity income amount in last year = RESPONSE) [laAim =RESPONSE]*

*CHECK: "annuity income amount in last year" <= 30000  
[laAim <= 30000]*

INTERVIEWER: Are you sure? £^laAim seems high - please check.  
END CHECK  
END OF FILTER

## **IA8 IAAIP**

*IF annuity income partner received in last year =RESPONSE [laAip=RESPONSE]*

*CHECK: ("annuity income partner received in last year" <= 30000) [laAip <= 30000]*

*INTERVIEWER: Are you sure? £^laAip seems high - please check.*

*END CHECK*

*END OF FILTER*

## **IA9- IA10 SPARE**

## **IA11 IAHDN**

*IF (health or disability benefits receiving at the moment =RESPONSE AND health or disability benefits receiving at the moment= none)*

*[lahdn=RESPONSE AND (None IN IAhdn)]*

*CHECK: (CARDINAL(health or disability benefits receiving at the moment)=1)  
[CARDINAL(lahdn)=1]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

*END CHECK*

*END OF FILTER*

## **IA12 IAHDN**

*IF benefits partner is receiving at the moment=95 [labepn= b95loop]*

*CHECK: (b95loop IN health or disability benefits receiving at the moment THEN b95loop IN type of health or disability benefit)*

*[b95loop IN lahdn THEN b95loop IN lahdr]*

*INTERVIEWER: ^b95loop wasn't given at laHdR. Please change!*

*END CHECK*

*END OF FILTER*

## **IA13 IAHDp**

*IF (partner's health or disability benefits= RESPONSE AND partner's health or disability benefits= none)*

*[lahdp = RESPONSE AND (None IN IAhdP)]*

*CHECK: (CARDINAL(partner's health or disability benefits) = 1) [CARDINAL(lahdp) = 1]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

END CHECK  
END OF FILTER

#### IA14 IAHDPO

*IF (partner's health or disability benefits =RESPONSE AND partner's health or disability benefits= none)  
[lahdpZ=RESPONSE AND (None IN IAhdpoZ)]*

CHECK: (CARDINAL(partner's health or disability benefits) = 1) [CARDINAL(lahdp) = 1]  
INTERVIEWER: 'None' is an exclusive code at this question. Please change!  
END CHECK  
END OF FILTER

#### IA15 IAHDPO

*IF (benefits partner is receiving at the moment=RESPONSE AND (None IN benefits  
partner is receiving at the moment))  
[lahdpn=RESPONSE AND (None IN IAhdpn)]*

CHECK: (CARDINAL(benefits partner is receiving at the moment)=1) [CARDINAL(lahdpn)=1]  
INTERVIEWER: 'None' is an exclusive code at this question. Please change!  
END CHECK  
END OF FILTER

#### IA16 IAHDPO

*IF (loop code value IN benefits partner is receiving at the moment)  
[b95loop IN benefits partner is receiving at the moment]*

CHECK: (loop code value IN "partner's health or disability benefits")  
[b95loop IN "partner's health or disability benefits"]  
INTERVIEWER : ^b95loop wasn't given at IaHdP. Please change!  
END CHECK  
END OF FILTER

#### IA17 IAA

*IF (AXIaA <= 300)*

CHECK: INVOLVING (IaA, IaP)  
INTERVIEWER: The amount ^IaA over a period of ^iaatxt is on average more than £300 per week.  
Please check.

END CHECK  
END OF FILTER

#### **IA17 - IA21 SPARE**

#### **IA22 - IA23 IABEN**

*IF benefits received at the moment =RESPONSE AND benefits received at the moment= none)  
[laben=RESPONSE AND (None IN IAben)]*

*CHECK: (CARDINAL(benefits received at the moment)=1) [CARDINAL(laben)=1]*  
*EDITOR: 'None' is an exclusive code at this question. Please change!*  
END CHECK  
END OF FILTER

*IF (benefits received at the moment = income support) AND (IlaDat < 1 October 2004))  
[(InSupp IN IAben) AND (IlaDat < MIGEnd)]*

*CHECK: ((Respondent Age < 60)) [(IAgeOf[pnum] < 60)]*  
*INTERVIEWER: Income Support or MIG is not longer available to people aged 60 or over. This benefit was replaced with the Pension Credit. Please change!*  
END CHECK  
END OF FILTER

#### **IA24 IABEPN IA25 IABEPN**

*IF (InSupp IN IaBepN) AND (IlaDat < MIGEnd)*

*CHECK: (IAgePart[pnum] < 60) INVOLVING(IaBePn)*  
*INTERVIEWER: Income Support or MIG is not longer available to people aged 60 or over. This benefit was replaced with the Pension Credit. Please change!*  
END CHECK  
END OF FILTER

*IF labepn=RESPONSE AND (None IN IAbepn)*

*CHECK: CARDINAL(labepn) = 1*  
*INTERVIEWER: 'None' is an exclusive code at this question. @/Please change!*  
END CHECK  
END OF FILTER

## **IA26-35 SPARE**

### **IA36 IASI**

*IF savings and investments held= none [Iasi= 96]*

CHECK: (CARDINAL("savings and investments held")=1) [CARDINAL(Iasi)=1]

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

### **IA37 IASAVA**

*IF amount of savings =RESPONSE [IaSava=RESPONSE]*

CHECK: ("amount of savings" <= 300000) [IaSava <= 300000]

INTERVIEWER: Are you sure? £^IaSava seems high - please check.

END CHECK

END OF FILTER

### **IA38 IASINT**

*IF interest received from account(s) =RESPONSE [IaSInt=RESPONSE]*

CHECK: ("interest received from account(s)" <= 15000) [IaSInt <= 15000]

INTERVIEWER: Are you sure? £^IaSint seems high - please check.

END CHECK

END OF FILTER

### **IA39 IATI**

*IF amount in TESSA =RESPONSE [IaTi=RESPONSE]*

CHECK: ("amount in TESSA" <= 100000) [IaTi <= 100000]

INTERVIEWER: Are you sure? £^IaTi seems high - please check.

END CHECK

END OF FILTER

### **IA40 IATII**

*IF amount received from these accounts last year = RESPONSE [IaTii=RESPONSE]*

CHECK: ("amount received from these accounts last year" <= 8000) [ $laTii \leq 8000$ ]  
INTERVIEWER: Are you sure? £ $laTii$  seems high - please check.  
END CHECK  
END OF FILTER

#### **IA41 IACISA**

*IF amount in cash component of ISA =RESPONSE [ $laCisa=RESPONSE$ ]*  
CHECK: ("amount in cash component of ISA" <= 40000) [ $laCisa \leq 40000$ ]  
INTERVIEWER: Are you sure? £ $laCisa$  seems high - please check.  
END CHECK  
END OF FILTER

#### **IA42 IALISA**

*IF How much life-insurance component of ISA worth =RESPONSE [ $laLIsa=RESPONSE$ ]*  
CHECK: ("How much life-insurance component of ISA worth" <= 20000) [ $laLIsa \leq 20000$ ]  
INTERVIEWER: Are you sure? £ $laLIsa$  seems high - please check.  
END CHECK  
END OF FILTER

#### **IA43 IASISA**

*IF How much stocks and shares component of ISA worth =RESPONSE [ $laSIsa=RESPONSE$ ]*  
CHECK: ("How much stocks and shares component of ISA worth" <= 100000) [ $laSIsa \leq 100000$ ]  
INTERVIEWER: Are you sure? £ $laSIsa$  seems high - please check.  
END CHECK  
END OF FILTER

#### **IA44 IAISAD**

*IF amount of income received from ISA last year = RESPONSE [ $laISAD=RESPONSE$ ]*  
CHECK: ("amount of income received from ISA last year" <= 4000) [ $laISAD \leq 4000$ ]  
INTERVIEWER: Are you sure? £ $laISAD$  seems high - please check.  
END CHECK

END OF FILTER

#### **IA45 IANPB**

*IF amount in Premium Bonds = RESPONSE [laNPB=RESPONSE]*

*CHECK: ("amount in Premium Bonds" <= 10000) [laNPB <= 10000]*

*EDITOR: 'None' is an exclusive code at this question. Please change!*

END CHECK

END OF FILTER

#### **IA46 IANPBP**

*IF prize income received from these bonds = RESPONSE [laNPBP=RESPONSE]*

*CHECK: ("prize income received from these bonds " <= 20000) [laNPBP <= 20000]*

*INTERVIEWER: Are you sure? £^laNPBP seems high - please check.*

END CHECK

END OF FILTER

#### **IA47 IANS**

*IF amount of national savings = RESPONSE [laNS=RESPONSE]*

*CHECK: amount of national savings <= 200000 [laNS <= 200000]*

*INTERVIEWER: Are you sure? £^laNS seems high - please check."*

END CHECK

END OF FILTER

#### **IA48 IANSI**

*IF interest received after tax =RESPONSE [laNSi=RESPONSE]*

*CHECK: ("interest received after tax" <= 10000) [laNSi <= 10000]*

*INTERVIEWER: Are you sure? £^laNSi seems high - please check.*

END CHECK

END OF FILTER

#### **IA49 IAIP**

*IF amount from Personal Equity plan if chose to sell =RESPONSE [laip=RESPONSE]*

CHECK: ("amount from Personal Equity plan if chose to sell" <= 200000)  
[lalp <= 200000]

INTERVIEWER: Are you sure? £^lalp seems high - please check.

END CHECK

END OF FILTER

### **IA50 IAIPI**

IF income received from personal equity plan in last year =RESPONSE [laipi=RESPONSE]

CHECK: ("income received from personal equity plan in last year" <= 15000)  
[laipi <= 15000]

INTERVIEWER: Are you sure? £^laipi seems high - please check.

END CHECK

END OF FILTER

### **IA51 IASSS**

IF amount received If chose to sell =RESPONSE [laSSS=RESPONSE]

CHECK: ("amount received if chose to sell" <= 200000) [laSSS <= 200000]

INTERVIEWER: Are you sure? £^laSSS seems high - please check.

END CHECK

END OF FILTER

### **IA52 IASSSI**

IF dividend income received in last year =RESPONSE [lasssi=RESPONSE]

CHECK: ("dividend income received in last year" <= 30000) [lasssi <= 30000]

INTERVIEWER: Are you sure? £^lasssi seems high - please check.

END CHECK

END OF FILTER

### **IA53 IAUIT**

IF amount received If chose to sell =RESPONSE [lauit=RESPONSE]

CHECK: ("amount received if chose to sell" <= 400000) [lauit <= 400000]

INTERVIEWER: Are you sure? £^lauit seems high - please check.

END CHECK  
END OF FILTER

#### **IA54 IAUTI**

*IF income received from unit trusts or investments =RESPONSE) [lauti=RESPONSE]*  
CHECK: ("income received from unit trusts or investments" <= 20000) [lauti <= 20000]  
INTERVIEWER: Are you sure? £^lauti seems high - please check.  
END CHECK  
END OF FILTER

#### **IA55 IABG**

*IF amount received If chose to sell =RESPONSE [labg=RESPONSE]*  
CHECK: ("amount received if chose to sell" <= 200000) [labg <= 200000]  
INTERVIEWER: Are you sure? £^labg seems high - please check.  
END CHECK  
END OF FILTER

#### **IA56 IABGI**

*IF income received from bonds and gilts =RESPONSE [labgi=RESPONSE]*  
CHECK: ("income received from bonds and gilts" <= 100000) [labgi <= 100000]  
INTERVIEWER: Are you sure? £^labgi seems high - please check.  
END CHECK  
END OF FILTER

#### **IA57 IASIO**

*IF amount in other savings or investments =RESPONSE [laSio=RESPONSE]*  
CHECK: ("amount in other savings or investments" <= 200000) [laSio <= 200000]  
INTERVIEWER: Are you sure? £^laSio seems high - please check.  
END CHECK  
END OF FILTER

#### **IA58 IASIOI**

*IF amount received from other savings or investments =RESPONSE [*laSiOi*=RESPONSE]*

*CHECK: ("amount received from other savings or investments" <= 20000) [*laSiOi* <= 20000]*

*INTERVIEWER: Are you sure? £*laSiOi* seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA59 IALIYA**

*IF amount dependants would get from life-insurance policy=RESPONSE [*laLiYA*=RESPONSE]*

*CHECK: ("amount dependants would get from life-insurance policy" <= 800000) [*laLiYA* <= 800000]*

*INTERVIEWER: Are you sure? £*laLiYA* seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA60 IALIPA**

*IF amount dependents would receive from life insurance policy=RESPONSE [*laLipA*=RESPONSE]*

*CHECK: (amount dependents would receive from life insurance policy <= 800000) [*laLipA* <= 800000]*

*INTERVIEWER: Are you sure? £*laLipA* seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA61 IASCA**

*IF amount savings component(s) would yield =RESPONSE [*laSCA*=RESPONSE]*

*CHECK: ("amount savings component(s) would yield" <= 500000) [*laSCA* <= 500000]*

*INTERVIEWER: Are you sure? £*laSCA* seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA62 IAPROP**

*IF assets owned= none [*laprop*=96]*

*CHECK: (CARDINAL("assets owned")=1) [CARDINAL(*laprop*)=1]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change*

END CHECK  
END OF FILTER

### **IA63 IAHOME**

*IF amount received if chose to sell =RESPONSE [laHome=RESPONSE]*  
CHECK: ("amount received if chose to sell" <= 500000) [laHome <= 500000]  
INTERVIEWER: Are you sure? £^laHome seems high - please check.  
END CHECK  
END OF FILTER

### **IA64 IAIRA**

*IF income or rent received from property last year =RESPONSE [IAira=RESPONSE]*  
CHECK: ("income or rent received from property last year" <= 100000) [IAira <= 100000]  
INTERVIEWER: Are you sure? £^IAira seems high - please check.  
END CHECK  
END OF FILTER

### **IA65 IAFBPS**

*IF amount received if sold Farm or Business property =RESPONSE [lafbps=RESPONSE]*  
CHECK: ("amount received if sold Farm or Business property" <= 1000000) [lafbps <= 1000000]  
INTERVIEWER: Are you sure? £^lafbps seems high - please check.  
END CHECK  
END OF FILTER

### **IA66 IAFBA**

*IF income received from property in last year =RESPONSE [IAfbA=RESPONSE]*  
CHECK: ("income received from property in last year" <= 100000) [IAfbA <= 100000]  
INTERVIEWER: Are you sure? £^IAfbA seems high - please check.  
END CHECK  
END OF FILTER

### **IA67 IAOASA**

*IF amount it is worth= RESPONSE [laOasA=RESPONSE]*

*CHECK: ("amount it is worth" <= 200000) [laOasA <= 200000]*

*INTERVIEWER: Are you sure? £^laOasA seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA68 IAREGM**

*IF amount usually received = RESPONSE AND amount usually received <>999997  
[laRegm=RESPONSE AND laRegm<>999997]*

*CHECK: (((("periods payments covered" =oneWeek AND "amount usually received " <= 4000) OR  
("periods payments covered" =twoweek AND "amount usually received " <= 8000) OR  
("periods payments covered" IN [fourweek,onemonth] AND "amount usually received " <= 16000) OR  
("periods payments covered" IN [Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum]  
AND "amount usually received " <= 200000)))  
[((larego=oneWeek AND laRegm <= 4000) OR (larego=twoweek AND laRegm <= 8000)  
OR (larego IN [fourweek,onemonth] AND laRegm <= 16000) OR (larego IN  
[Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum] AND laRegm <= 200000))]*

*INTERVIEWER: Are you sure? £^laRegm seems high - please check.*

*END CHECK*

*END OF FILTER*

### **IA69 IAPK**

*IF payments received in last year= none [lapk=96]*

*CHECK: (CARDINAL("payments received in last year")=1) [CARDINAL(lapk)=1]*

*'None' is an exclusive code at this question. Please change!*

*END CHECK*

*END OF FILTER*

### **IA70 IAPKO**

*IF payments received in last year= none [None IN lapkZ]*

*CHECK: (CARDINAL("payments received in last year")=1) [CARDINAL(lapkZ)=1]*

*EDITOR: 'None' is an exclusive code at this question. Please change!*

*END CHECK*

END OF FILTER

#### **IA71 - IA72 IADEBM**

*IF amount of outstanding balance on cards=RESPONSE [ladebm=RESPONSE]*

*CHECK: ("amount of outstanding balance on cards">0 INVOLVING("whether owes money on credit or store cards", "amount of outstanding balance on cards"))  
[ladebm>0 INVOLVING(laDebt,laDebm)]*

*"EDIT: laDeb=0 Please change laDebt to 'no' (code 2))"*

*END CHECK*

END OF FILTER

*IF amount of outstanding balance on cards = RESPONSE [ladebm=RESPONSE]*

*CHECK: ("amount of outstanding balance on cards"≤ 50000) [ladebm ≤ 50000]*

*INTERVIEWER: Are you sure? £^ladebm seems high - please check.*

*END CHECK*

END OF FILTER

#### **IA73 IAOWEM**

*IF amount owed = RESPONSE [laowem=RESPONSE]*

*CHECK: ("amount owed" ≤ 50000) [laowem ≤ 50000]*

*INTERVIEWER: Are you sure? £^laowem seems high - please check.*

*END CHECK*

END OF FILTER

#### **IA74 IAREP**

*IF amount of usual repayments = RESPONSE [larep=RESPONSE]*

*CHECK: ( ((("period repayments cover" =oneWeek AND "amount of usual repayments" ≤ 300) OR ("period repayments cover" =twoWeek AND "amount of usual repayments" ≤ 600) OR ("period repayments cover" IN [fourWeek,onenmonth] AND "amount of usual repayments" ≤ 1200) OR ("period repayments cover" IN [Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum] AND "amount of usual repayments" ≤ 15000)))*

*[(laRegrp=oneWeek AND larep ≤ 300) OR (laRegrp=twoWeek AND larep ≤ 600) OR (laRegrp IN [fourWeek,onenmonth] AND larep ≤ 1200) OR (laRegrp IN [Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum] AND larep ≤ 15000))]*

*INTERVIEWER: Are you sure? £^larep seems high - please check.*

END CHECK  
END OF FILTER

### IA75 IALOAN

*IF owes money on following = none [laloan=96]*  
CHECK: (CARDINAL("owes money on following")=1) [CARDINAL(laloan)=1]  
'None' is an exclusive code. Please change!  
END CHECK  
END OF FILTER

### IA76 IALOAM

*IF total amount owed on loans = RESPONSE [laloam=RESPONSE]*  
CHECK: ("total amount owed on loans" <= 50000) [laloam <= 50000]  
INTERVIEWER: Are you sure? £^laloam seems high - please check.  
END CHECK  
END OF FILTER

### IA77 IALRE

*IF amount of usual repayments on loans = RESPONSE [lalre=RESPONSE]*  
CHECK: (((("period usual repayments cover" =oneWeek AND "amount of usual repayments on loans" <= 300) OR ("period usual repayments cover" =twoWeek AND "amount of usual repayments on loans" <= 600) OR ("period usual repayments cover" IN [fourWeek,onemonth] AND "amount of usual repayments on loans" <= 1200) OR ("period usual repayments cover" IN [Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum] AND "amount of usual repayments on loans" <= 15000)))  
[((laLrep=oneWeek AND lalre <= 300) OR (laLrep=twoWeek AND lalre <= 600) OR (laLrep IN [fourWeek,onemonth] AND lalre <= 1200) OR (laLrep IN [Thrweek,Twomonth..sixmonth,oneyear,lessweek..lumpsum] AND lalre <= 15000))]  
INTERVIEWER: Are you sure? £^lalre seems high - please check.  
END CHECK  
END OF FILTER

### IA78 IAAM

*IF amount of personal share = RESPONSE [laAm=RESPONSE]*  
CHECK: ("amount of personal share" <= 100000) [laAm <= 100000]

INTERVIEWER: Are you sure? £^laAm seems high - please check.  
END CHECK  
END OF FILTER

### **IA79 IAIY**

*IF (iaiy = RESPONSE)*  
*CHECK: iaiy <= lIntDat.Year*  
This is in the future. Please change.  
END CHECK  
END OF FILTER

### **IA80 IAIAG**

### **IA81 IAIAG**

*IF (iaiag = RESPONSE)*  
*CHECK: IF IAIWh=Part THEN iaiag<=IPartAge[pnum]*  
This is older than the respondent's partner/spouse's current age of ^IPartAge[pnum]. Please change.  
END CHECK  
*CHECK: IF iaiag <= IAgeOf[pnum]*  
This is older than the respondents current age of ^IAgeOf[pnum]. Please change.  
END CHECK  
END OF FILTER

### **IA82 IAGY**

*IF (iagy = RESPONSE)*  
*CHECK: iagy <= lIntDat.Year*  
This is in the future. Please change.  
END CHECK  
END OF FILTER

**IA83 IAGAG**  
**IA84 IAGAG**

*IF (IAGAg = RESPONSE)*

*CHECK: IF IAGWh=Part THEN iagag<=IPartAge[pnum]*

This is older than the respondent's partner/spouse's current age of ^IPartAge[pnum]. Please change.

END CHECK

*CHECK: iagag <= IAgeOf[pnum]*

This is older than the respondents current age of ^IAgeOf[pnum]. Please change.

END CHECK

END OF FILTER

## **IA85 IAHHINC**

*CHECK: IAHHInc<>HardRef*

Are you sure that the respondent will not answer these questions? This option should only be used for extreme cases. The respondent will have the option to refuse at individual questions if they do choose to continue.

END CHECK

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 7 HOUSING AND CONSUMPTION MODULE (HO)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## HOUSING AND CONSUMPTION MODULE (HO)

*IF (name in whose the accommodation is owned or rented at last interview = RESPONSE) AND (Total number of previous householders still in household = total number of current householders in household) [(HHldr (Last int) = RESPONSE) AND (HoAsk = HHldr (Last int).CARDINAL)]*

### **HOWHO\***

I'd like to check some general information about [^your / [^name's] / your household's / [^name's] household's] accommodation.

Is [^your / his / her] accommodation still in [^your / [^name's] / your and [^name's] / etc.] name?

1 Yes

2 No

END OF FILTER

*IF whether accommodation is in same person's name as last time = EMPTY OR whether accommodation is in same person's name as last time = no  
[HoWho = EMPTY OR HoWho = 2]*

### **HOWHN\* @**

[^BLANK / I'd like to get some general information about [^your / [^name's]] household's accommodation.] In whose name is the accommodation owned or rented?

CODE ALL THAT APPLY.

01 [^Person's name[1]]

02 [^Person's name[2]]

03 [^Person's name[3]]

04 [^Person's name[4]]

05 [^Person's name[5]]

06 [^Person's name[6]]

07 [^Person's name[7]]

08 [^Person's name[8]]

09 [^Person's name[9]]

10 [^Person's name[10]]

11 [^Person's name[11]]

12 [^Person's name[12]]

13 [^Person's name[13]]

14 [^Person's name[14]]

15 [^Person's name[15]]

16 [^Person's name[16]]

97 Not a household member

*[Multiple responses to HOWHN are recoded in variables:*

**HOWH1 HOWH2 HOWH3 HOWH4 HOWH5 HOWH6 HOWH7 HOWH8 HOWH9 HOWH10  
HOWH11 HOWH12 HOWH13 HOWH14 HOWH15 HOWH16 HOWH97]**

*LOOP FOR k:= 1 TO 16 (please note: each person included in HOWHN gets asked the following questions in turns)*

*IF (((person's name in HOWHN still present in household = yes) AND NOT (whose name accommodation is owned or rented in = person's name in HOWHN)) AND NOT (person number of partner = person in whose name the accommodation is owned or rented)) AND*

(person's age >= 16)

[(((DMPres = 1) AND NOT (HoWhN = k)) AND NOT (CoupleN = HoWhN)) AND (IAgeOf >= 16)]

**HOBAS\*@**

On what basis [^are you / is [^name]] living here? [^Do you / Does [^name] / Does your household / Does [^name's] household]

...READ OUT... CODE ONE ONLY.

- 1 ... pay regular rent,
- 2 pay something from time to time,
- 3 or, live here rent free?

**[There is a separate variable for responses about each person]**

**[Responses to HOBAS are recoded in HOBAS, HOBAS2 to HOBAS9]**

*IF basis on which lives here = pay regular rent [HoBas = 1]*

**HOBP\*@**

Thinking about [^your / [^name's] / you and your household's] last rent payment, what period did it cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**[There is a separate variable for responses about each rent payment]**

**[Responses to HOBP are recoded in HOBP, HOBP2 to HOBP9]**

*IF period covered by last rent payment = RESPONSE [HoBP = RESPONSE]*

**HOBA\*@**

How much was [^your / [^name's] / you and your household's] last rent payment?

INTERVIEWER: Enter amount.

Range: 0..99997

**[There is a separate variable for responses about each person]**

**[Responses to HOBA are recoded in HOBA, HOBA2 to HOBP9]**

**[CHECK HO2]**

END OF FILTER

*IF (((Period covered by last rent payment = DK) OR (Period covered by last rent payment = RF)) OR (amount of last rent = DK)) OR (amount of last rent = RF)*

*[(((HoBP = DK) OR (HoBP = RF)) OR (HoBA = DK)) OR (HoBA = RF)]*

*IF period covered by last rent payment = one week [HoBP = 1]*

**HOBPW\*@**

Was it less than [^20 / 40 / 60 / 150 pounds], more than [^20 / 40 / 60 / 150 pounds] or what?

**[Bracket results are recoded in HOBAWL HOBAWU HOBAWE HOBAWR for person 1 to HOB16WL HOB16WU HOB16WE HOB16WR for person 16]**

*ELSE IF period covered by last rent payment = two weeks [HoBP = 2]*

**HOBPF\*@**

Was it less than [^40 / 80 / 120 / 300 pounds], more than [^40 / 80 / 120 / 300 pounds] or what?

**[Bracket results are recoded in HOBAFL HOBAFU HOBAFE HOBAFR for person 1 to HOB16FL HOB16FU HOB16FE HOB16FR for person 16]**

*ELSE IF period covered by last rent payment = [four weeks, one month] [HoBP = [4, 5]]*

**HOBPM\*@**

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

**[Bracket results are recoded in HOBAML HOBAMU HOBAME HOBAMR for person 1 to HOB16ML HOB16MU HOB16ME HOB16MR for person]**

*ELSE IF period covered by last rent payment = [one year, lump sum] [HoBP = [52, 95]]*

**HOBPY\*@**

Was it less than [^1000 / 2000 / 3000 / 7500 pounds], more than [^1000 / 2000 / 3000 / 7500 pounds] or what?

**[Bracket results are recoded in HOBAYL HOBAYU HOBAYE HOBAYR for person 1 to HOB16YL HOB16YU HOB16YE HOB16YR for person 16]**

**ELSE**

**HOBPO\*@**

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

**[Bracket results are recoded in HOBAOL HOBAOU HOBAOE HOBAOR for person 1 to HOB16OL HOB16OU HOB16OE HOB16OR for person 16]**

**END OF FILTER**

**END OF FILTER**

**END OF FILTER**

**END OF FILTER**

END OF FILTER

*IF (whether interviewing at same address as last time = yes) AND (how occupies accommodation (Last interview) = RESPONSE)  
[(DhSameH = 1) AND (HoTenu (Last int) = RESPONSE)]*

**HOTENUN\***

I'd like to check how [^this accommodation is owned or rented / [^name] and [^name] / you occupy this accommodation / [^name] occupies this accommodation / your / [^name's] household occupies this accommodation].  
[^Is this accommodation still owned outright? /  
Is this accommodation still being bought with the help of a mortgage or loan? /  
Is this accommodation still part-rented, part-owned? /  
Is this accommodation still rented? /  
Is this accommodation still rent free? /  
Is this accommodation still squatted? /  
Do [^name] and [^name] still own this accommodation outright? /  
Are [^name] and [^name] still buying this accommodation with the help of a mortgage or loan? /  
Are [^name] and [^name] still paying part rent and part mortgage (shared ownership) /  
Are [^name] and [^name] still renting this accommodation? /  
Are [^name] and [^name] still living here rent free? / Are [^name] and [^name] still squatting? /  
Does [^name] / still own this accommodation outright? /  
Is [^name] still buying this accommodation with the help of a mortgage or loan? /  
Is [^name] still paying part rent and part mortgage (shared ownership)? /  
Is [^name] still renting this accommodation? /  
Is [^name] still living here rent free? /  
Is [^name] still squatting? /  
[^Do you / Does [^name]] still own this accommodation outright? /  
[^Are you / Is [^name]] still buying this accommodation with the help of a mortgage or loan? /  
[^Are you / Is [^name]] still paying part rent and part mortgage (shared ownership)? /  
[^Are you / Is [^name]] still renting this accommodation? /  
[^Are you / Is [^name]] still living here rent Free? /  
[^Are you / Is [^name]] still squatting? /  
[^Do you / does [^name] / does your / [^name's] household still own this accommodation outright? /  
Is [^your / [^name's]] household still buying this accommodation with the help of a mortgage or loan? /  
Is [^your / [^name's]] household still paying part rent and part mortgage (shared ownership)? /  
Is [^your / [^name's]] household still renting this accommodation? /  
Is [^your / [^name's]] household still living here rent free? /  
Is [^your / [^name's]] household still squatting?  
1 Yes  
2 No

END OF FILTER

*IF tenure status <> yes [HoTenuN <> 1]*

**HOTENU\***

SHOW CARD G1

In which of these ways [^does the owner own / does the renter rent / do you / [^name] and

[^name] occupy / does [^name] occupy] this accommodation?

INTERVIEWER: If own outright or own with help of a mortgage or loan, include owning with equity release.

- 1 Own it outright
- 2 Buying it with the help of a mortgage or loan
- 3 Pay part rent and part mortgage (shared ownership)
- 4 Rent it
- 5 Live here rent free (including rent free in relative's / friend's property; excluding squatting)
- 6 Squatting

**[CHECK HO3]**

END OF FILTER

*IF (how occupies accommodation = [pay part rent and part mortgage, rents]) AND at least one person named at HoWHN is eligible for interview = Yes) [(HoTenu = 3, 4) AND (HoEli = 1)]*

**HOJOB\***

Does the accommodation go with the job of someone in the household?

- 1 Yes
- 2 No

**HOLAND\***

SHOW CARD G2

Who is [^your / [^name's]] landlord?

INTERVIEWER: Include New Town Development in Code 1.

- 1 Local authority or council
- 2 Housing association or co-operative or charitable trust
- 3 Individual private landlord
- 4 Employer of a household member
- 5 Relative/friend of a household member
- 95 Another organisation / individual

**HOFURN\***

Is [^your / [^name's]] accommodation provided ... READ OUT ...

- 1 ...furnished
- 2 partly furnished (e.g. curtains and carpets only)
- 3 or, unfurnished?

END OF FILTER

*IF how occupies accommodation = pays part rent and part mortgage AND at least one person named at HoWHN is eligible for interview = yes [HoTenu = 3 AND HoEli = 1]*

**HOPART\***

What percentage of the property [^are you / is [^name]] buying?

- 1 25 percent
- 2 50 percent
- 3 75 percent
- 95 Other

*IF percentage of property buying = Other [HoPart = 95]*

**HPOPR\***

INTERVIEWER: ENTER OTHER PERCENTAGE

Range: 1..99

END OF FILTER

END OF FILTER

*IF (how occupies accommodation = [rents, pays part rent and part mortgage]) AND (at least one person named at HoWHN is eligible for interview = Yes) [(HoTenu = 3, 4) AND (HoEli = 1)]*

**HOPERI\***

Thinking about [^your / [^name's]] last rent payment, what period did this cover?

INTERVIEWER: If 100% rent rebate, code 97.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)
- 97 DOESN'T MAKE RENT PAYMENTS

*IF (period covered by last rent payment = RESPONSE) AND (period covered by last rent payment <> doesn't make rent payments) [(HoPeri = RESPONSE) AND (HoPeri <> 97)]*

**HORENT\***

How much was [^your / [^name's]] last rent payment (including any services or charges but after any rebates)?

INTERVIEWER: If 100% rent rebate, code 99997.

Range: 0..99997

**[CHECK HO4]**

END OF FILTER

*IF (((period covered by last rent payment = DK) OR (period covered by last rent payment = RF)) OR (amount of last rent repayment = DK)) OR (amount of last rent repayment = RF)*

*[((HoPeri = DK) OR (HoPeri = RF)) OR (HoRent = DK)) OR (HoRent = RF)]*

*IF period covered by last rent payment = one week [HoPeri = 1]*

**HORNTWB\*@**

Was it less than [^20 / 40 / 60 / 150 pounds], more than [^20 / 40 / 60 / 150 pounds]

or what?

**[Bracket results are recoded in horenwl, horenwu, horenwe, horenwr]**

ELSE IF period covered by last rent payment = two weeks [HoPeri = 2]

**HORNTFB\*@**

Was it less than [^40 / 80 / 120 / 300 pounds], more than [^40 / 80 / 120 / 300 pounds] or what?

**[Bracket results are recoded in horenfl, horenfu, horenfe, horenfr]**

ELSE IF period covered by last rent payment = [four weeks, one month] [HoPeri = [4, 5]]

**HORNTMB\*@**

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

**[Bracket results are recoded in horenml, horenmu, horenme, horenmr]**

ELSE IF period covered by last rent payment = [one year, lump sum] [HoPeri = [52, 95]]

**HORNTYB\*@**

Was it less than [^1000 / 2000 / 3000 / 7500 pounds], more than [^1000 / 2000 / 3000 / 7500 pounds] or what?

**[Bracket results are recoded in horenly, horenuy, horenye, horenryr]**

ELSE

**HORNTOB\*@**

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

**[Bracket results are recoded in horenol, horenou, horenoe, horenor]**

END OF FILTER

END OF FILTER

IF (amount of last rent repayment <> DK) AND (period covered by last rent payment <> doesn't make rent payments) [(HoRent <> 99997) AND (HoPeri <> 97)]

**HOINCL\*@**

SHOW CARD G3

Did [^your / [^name's]] last rent payment include any of these?

PROBE: What else?

CODE ALL THAT APPLY.

- 1 Water charges
- 2 Sewerage charges
- 3 Land or business premises
- 4 Separate Garage
- 5 Heating or lighting or hot water

6 Council Tax  
96 None of these

**[Multiple responses to HOINCL are recoded in variables: HOINCLWA HOINCLSE HOINCLLA HOINCLGA HOINCLHE HOINCLCO HOINCL96]**  
**[code maximum 7 out of 7 possible responses]**

**[CHECK HO5]**

**HOINCA\*** @

SHOW CARD G4

Did [^your / [^name's]] last rent payment include any of these?

PROBE: What else?

CODE ALL THAT APPLY

- 1 Meals
- 2 Gardening
- 3 Cleaning
- 4 Warden or porter
- 5 Security service/guard
- 95 Other services
- 96 None of these

**[Multiple responses to HOINCA are recoded in variables: HOINAME HOINAGD HOINACL HOINAWP HOINASG HOINA95 HOINA96]**

**[code maximum 6 out of 7 possible responses]**

**[Open responses to HOOINC are coded and merged with the multiple responses to HOINCA. These merged responses are recoded in variables HOINAMME HOINAMGD HOINAMCL HOINAMWP HOINAMSG HOINAM85 HOINAM86 HOINAM96]**

*IF items last rent payment included = other [Holnca = 95]*

**HOOINC\*@**

What other services does [^your / [^name's]] rent include?

INTERVIEWER: Write in.

String 60

END OF FILTER

**[CHECK HO6]**

**HOHBEN\***

Did ^[you/he/she] receive any housing benefit (also known as rent rebate or rent allowance) / local housing allowance to help pay ^[your/his/her] last rent?

- 1 Yes
- 2 No

*IF whether received housing benefit for last rent = yes [HoHBen = 1]*

**HORHB\***

Did ^[you/he/she} receive the benefit directly (cash, cheque or into a bank account) or was it deducted from ^[your/his/her] rent?

- 1 Deducted from rent
- 2 Received it directly

*IF how received benefit = received directly [HorHB = 2]*

**HOHBCK\***

Can I just check, was the last rent payment that ^[you/he/she] just told me about before or after taking off the Housing Benefit?

- 1 Before
- 2 After

END OF FILTER

END OF FILTER

END OF FILTER

*IF (period covered by last rent payment = doesn't make rent payments) OR (amount of last rent payment = 99997) OR (how received benefit = deducted from rent)  
[(HoPeri = 97) OR (HoRent = 99997) OR (HorHB = 1)]*

**HOREBP\***

Thinking about what [^your / [^name's]] last rent payment would have been if housing benefit had not been deducted from it, what period would this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF last rent paymen tlf housing benefit not deducted = response [HORRebp = response]*

**HOREBA\***

How much would [^your / [^name's]] last rent payment have been if housing benefit had not been deducted from it?

Range: 0..99997

**[CHECK HO7]**

END OF FILTER

*IF (last rent payment If housing benefit not deducted = DK OR RF) OR*

*(period covered by last rent payment = DK OR RF) [(HOReba = NONRESPONSE) OR (HoRebp = NONRESPONSE)]*

*IF period covered by last rent payment = one week [HoPeri = 1]*

**HOREBWB\*@**

Would it have been less than [^30 / 50 / 75 / 150 pounds], more than [^30 / 50 / 75 / 150 pounds] or what?

**[Bracket results are recoded in HOREBWL HOREBWU HOREBWE HOREBWR]**

*ELSE IF period covered by last rent payment = two weeks [HoPeri = 2]*

**HOREBFB\*@**

Would it have been less than [^60 / 100 / 150 / 300 pounds], more than [^60 / 100 / 150 / 300 pounds] or what?

**[Bracket results are recoded in HOREBFL HOREBFU HOREBFE HOREBFR]**

*ELSE IF period covered by last rent payment = [four weeks, one month] [HoPeri = [4, 5]]*

**HOREBMB\*@**

Would it have been less than [^120 / 200 / 300 / 600 pounds], more than [^120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOREBML HOREBMU HOREBME HOREBMR]**

*ELSE IF period covered by last rent payment = [one year, lump sum] [HoPeri = [52, 95]]*

**HOREBYB\*@**

Would it have been less than [^1500 / 2500 / 3750 / 7500 pounds], more than [^1500 / 2500 / 3750 / 7500 pounds] or what?

**[Bracket results are recoded in HOREBYL HOREBYU HOREBYE HOREBYR]**

ELSE

**HOREBOB\*@**

Would it have been less than [^120 / 200 / 300 / 600 pounds], more than [^120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOREBOL HOREBOU HOREBOE HOREBOR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (whether last rent payment was before or after taking off housing benefit = before)  
OR rent payment made before or after housing benefit = NONRESPONSE  
[HoHBck = 1 OR HoHBck = NONRESPONSE]*

**HOHBP\***

Thinking about your last housing benefit payment you received, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF (period covered by last housing benefit payment = response then) [HOHBP = RESPONSE]*

**HOHBA\***

How much housing benefit did you receive last time?

Range: 0..99997

END OF FILTER

*IF amount of housing benefit received last time = NONRESPONSE OR  
period covered by housing benefit payment = NONRESPONSE  
[HoHBA = NONRESPONSE OR HoHBP = NONRESPONSE]*

*IF period covered by housing benefit payment = one week [HoHBP = 1]*

**HOHBWB\*@**

Would it have been less than [^30 / 50 / 75 / 150 pounds], more than [^30 / 50 / 75 / 150 pounds] or what?

**[Bracket results are recoded in HOHBAWL HOHBAWU HOHBAWE HOHBAWR]**

*ELSE IF period covered by housing benefit payment = two weeks [HoHBP = 2]*

**HOHBFB\*@**

Would it have been less than [^60 / 100 / 150 / 300 pounds], more than [^60 / 100 / 150 / 300 pounds] or what?

**[Bracket results are recoded in HOHBAFL HOHBAFU HOHBAFE HOHBAFR]**

*ELSE IF period covered by housing benefit payment = four weeks, one month  
[HoHBP = 4, 5]*

**HOHBMB\*@**

Would it have been less than [^120 / 200 / 300 / 600 pounds], more than [^120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOHBAML HOHBAMU HOHBAME HOHBAMR]**

ELSE *IF period covered by housing benefit payment = [one year, lump sum]  
[HoHBP = 52, 95]*

**HOHBYB\*@**

Would it have been less than [^1500 / 2500 / 3750 / 7500 pounds], more than  
[^1500 / 2500 / 3750 / 7500 pounds] or what?

**[Bracket results are recoded in HOHBAYL HOHBAYU HOHBAYE HOHBAYR ]**

ELSE

**HOHBOB\*@**

Would it have been less than [^120 / 200 / 300 / 600 pounds], more than [^120  
/ 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOHBAOL HOHBAOU HOHBAOE HOHBAOR ]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (period covered by last rent payment = doesn't make rent payments) OR (last rent  
payment = 100% rebate) [(HoPeri = 97) OR (HoRent = 99997)]*

**HOHB\*@**

SHOW CARD G4

Does [^your / [^name's]] accommodation include any of these?

PROBE: What else?

CODE ALL THAT APPLY.

1 Meals

2 A garden

3 Cleaning

4 Warden or porter

5 Security service / guard

95 Other services

96 None of these

**[Multiple responses to HOHB are recoded in variables: HOHBME HOHBGA HOHBCL  
HOHBWP HOHBSG HOHB95 HOHB96]**

**[code maximum 6 out of 7 possible responses]**

**[CHECK HO8]**

*IF (service included with accommodation = other) AND ((whether post-interview editing  
question <> yes) OR (services included with accommodation = EMPTY OR (services  
included with accommodation = Other))) [(HoHB = 95) AND ((EditQre <> 1) OR (HoHBz  
= EMPTY OR HoHBz = 95))]*

**HOHBO\*@**

What other services does [^your / [^name's]] accommodation come with?  
String 60

**[Open responses to HOHBO are coded and merged with the multiple responses to HOHB These merged responses are recoded in variables: HHBMME HOHBMGA HOHBMWP HOHBMMSG HOHBM85 HOHBM86 HOHBM96]**

END OF FILTER

**[CHECK HO9]**

END OF FILTER

**HORTSET\*@**

INTERVIEWER: The Renting section is finished.

Please enter <1> here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

END OF FILTER

**HOMSTSET\*@**

INTERVIEWER: Start of Property and Mortgages section.

Please enter <1> here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

*IF (living in the same house as last time = no) and (way of occupying home at last interview = owned outright OR buying with mortgage OR shared ownership)*

*[(DhSameH = No) and (HFFW.HOTenu IN [own,buymortg,shownsh])]*

**HOSELL**

^[Have you/has name] sold ^[your/his/her] previous home which ^[you/he/she] lived in when we last interviewed ^[you/him/her] on ^[date of previous interview]?

1 Yes

2 No

*IF sold home since previous interview = yes [if HoSell = yes]*

**HOSOLD**

How much did ^[you/he/she] sell ^[your/his/her] previous property for?

INTERVIEWER: Enter amount.

Range : 0.00..9999999.00

If (amount property sold for = DON'T KNOW) or (amount property sold for = RF)  
[HoSold = DONT KNOW OR HoPay = RF]

**HOSOLDB\*@**

Was it less than [^10000 / 20000 / 50000 / 150000 pounds], more than [^10000 / 20000 / 50000 / 150000 pounds] or what?

**[Bracket results are recoded in HOSOLDL HOSOLDU HOSOLDE HOSOLDR ]**

END OF FILTER  
END OF FILTER  
END OF FILTER

*IF moved since last interview, or moved between wave 3 and wave 4 [(DhSameh <> Yes) OR (DhSameh = Yes AND HFFW.HoMove <> RESPONSE)]*

#### **HOMOVE**

In what year did ^[you/name] move to this accommodation?

INTERVIEWER: If born there, code year of birth.

IF ASKED: Code earliest year a member of household moved to the accommodation.

Range : 1900..2050

[CHECK HO10]  
[CHECK HO11]  
[CHECK HO12]

END OF FILTER

*IF ((how occupies accommodation = owns it outright, buying with a mortgage or loan, shared ownership) AND (at least one person named at HoWHN is eligible for interview = yes)) AND NOT ((same accommodation as last time = yes) AND year accommodation bought (Last interview) = RESPONSE)) [(((HoTenu = 1, 2, 3) AND (HoEli = 1)) AND NOT ((DhSameh = 1) AND HoYear (Last int) = RESPONSE))]*

#### **HOYEAR\***

In what year did [^you / [^name]] buy this accommodation?

Range: 1900..2050

[CHECK HO13]  
[CHECK HO14]  
[CHECK HO15]

*IF NOT ((Same accommodation as last time = yes) AND amount paid for property (Last interview) = RESPONSE)) [NOT Dhsamet = 1 AND HoPay (Last int) = RESPONSE]*

#### **HOPAY\***

How much did [^you / [^name]] pay for the property?

INTERVIEWER: Enter amount to the nearest £.

Range: 0..9999997

*IF amount paid for property = RESPONSE [HoPay = RESPONSE]*

**[CHECK HO16]**

*ELSE IF (amount paid for property = DONT KNOW) OR (amount paid for property = RF) [HoPay = DONT KNOW OR HoPay = RF]*

#### **HOPAYB\*@**

Was it less than [^10000 / 20000 / 50000 / 150000 pounds], more than [^10000 / 20000 / 50000 / 150000 pounds] or what?

[Bracket results are recoded in HOPAYL, HOPAYU, HOPAYE, HOPAYR]

END OF FILTER

END OF FILTER

END OF FILTER

*IF ((Same accommodation as last time = yes) and (who bought accommodation from at last interview = EMPTY)) OR (same accommodation as last time = no)*

*[IF ((DhSameh = 1 and HoRTB (Last int) = EMPTY)) OR (QHD.DhSameh = 2)]*

**HORTB**

SHOW CARD G6

Who did [^you / [^name]] buy this accommodation from?

INTERVIEWER: Code 'Right to Buy Scheme' as 'Council or Local Authority'.

CODE ONE ONLY.

- 1 Private Owner
- 2 Council or Local Authority
- 3 Housing Association
- 4 Landlord
- 5 Family or relative
- 96 None of these

*IF (who accommodation bought from at last interview <> council) AND (who accommodation bought from <> council) AND whether bought from council or local authority at last interview <> RESPONSE)*

*[HoRTB (Last int) <> 2 AND HoRTB <> 2 AND HoRTBe (Last int) <> RESPONSE]*

**HORTBE**

[^Have you / has [^name]] ever bought a home from a council or local authority, for example under the Right to Buy scheme?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (how occupies accommodation = [owns it outright, buying with a mortgage or loan, shared ownership]) AND (at least one person named at HoWHN is eligible for interview = Yes)*

*[(HoTenu =[1, 2, 3]) AND (HoEli = 1)]*

**HOSELLP\***

How much would [^you / [^name]] expect to get for [^your / his / her] home if [^you / he / she] sold it today?

Range: 0..9999997

**[CHECK HO17]**

*IF (amount expected to getIf property sold = DONT KNOW) OR (amount expected to getIf property sold = RF) [(HoSellP = DONT KNOW) OR (HoSellP = RF)]*

**HOSELLPB\*@**

Would it be less than [^50000 / 75000 / 125000 / 500000 pounds], more than [^50000 / 75000 / 125000 / 500000 pounds] or what?

**[Bracket results are recoded in HOSELLL, HOSELLU, HOSELLE, HOELLR]**

END OF FILTER

END OF FILTER

*IF (((how occupies accommodation = own) AND (whether interviewing at same address as last time = no)) OR (((how occupies accommodation = own) AND (whether interviewing at same address as last time = yes)) AND how occupies accommodation = own) AND whether mortgage taken when bought accommodation (Last interview)> RESPONSE)) OR how occupies accommodation (Last interview) = [renting, rent-free, squatting] OR how occupies accommodation (Last int) = NONRESPONSE)) AND (at least one person named at HoWHN is eligible for interview = yes)) [((IAskPx > 1) AND ((HoTenu = 1) AND (DhSameH = 2))) OR (((HoTenu = 1) AND (DhSameH = 1)) AND HoTenu = 1) AND HoEvM (Last int) > RESPONSE)) OR HoTenu (Last int) = [4 , 5, 6]) OR HoTenu (Last int) = NONRESPONSE)) AND HoEli = 1))]*

**HOEVM**

When [^you / [^name]] bought this accommodation, did [^you / [^name]] take out a mortgage?

- 1 Yes
- 2 No

END OF FILTER

**HOORM**

[^Did / Not including your original mortgage, did] [^you / [^name]] ever take out any [^BLANK / additional] mortgages or loans secured on this property?

- 1 Yes
- 2 No

*IF ((how occupies accommodation = buying with a mortgage or loan, shared ownership) AND (at least one person named at HoWHN is eligible for interview = yes))  
[(HoTenu =2,3) AND (HoEli = 1)]*

*IF ((number of outstanding mortgages at last interview >0 and (Same accommodation as last | time = yes))*

*[(HoOutM (Last int) > 0) AND (DhSameh = 1)]*

**HOOOUTMC**

Our records show that last time we interviewed you, you had [^number of outstanding mortgages].

Mortgage circumstances can change over time - some people pay off their mortgage more quickly, borrow additional money on their mortgage or take out new mortgages. It's important that we understand ^[your/name's] current mortgage situation correctly.

- 1 Continue
- 2 Dispute

END OF FILTER

**HOOUTM\***

How many mortgages or loans [^do you / does [^name]] have outstanding on this property?

Range: 1..10

**[CHECK]**

IF (HoOutM = RESPONSE) THEN

(HoOutM > 0)

INVOLVING(HoOutM,HoTenu,HoTenuN)

"@/This is not possible, the respondent has no mortgages but states that home is owned with help of mortgage, please change tenure or mortgage details."

ENDIF

*IF (number of mortgages outstanding (last int) >0) AND (Same accommodation as last time = yes) AND (number of mortgages outstanding (last int)) AND (mortgage records from last int = disputed)*

*[(HoOutM (Last int) > 0) AND (DhSameh = Yes) AND(NMort (Last int) > HoOutm) AND (HoOutMC <> Dispute)]*

**HOCHM**

Our records show that last time ^[you/name] had ^[number of mortgages at last interview] mortgages. Can I just check what happened to the other mortgage(s)?

- 1 Paid it/them off
- 2 Combined it with another mortgage
- 3 Partly paid off and partly combined with another mortgage
- 4 Respondent had forgotten about one or more mortgages

END OF FILTER

*IF mortgage status = new mortgage, additional mortgage, previous mortgage missed at last interview [HoDMSt = 2, 3, 4]*

**HOMTY1N TO HOMTY5N\***

SHOW CARD G5

^[Thinking about [^your / [^name's]] [1<sup>st</sup>/2<sup>nd</sup>/3<sup>rd</sup> etc mortgage] what type of mortgage or loan is that?

INTERVIEWER: Please refer to annual statement or mortgage paper work where possible.

- 1 A repayment mortgage or loan (where [^your / his / her] mortgage payments cover interest and part of the original loan)
- 2 An endowment mortgage (where [^your / his / her] mortgage payments cover interest only and [^you / he / she]] save[^BLANK/s] separately to pay off the capital)
- 3 Part repayment and part endowment
- 4 A pension mortgage (where [^your / his / her] mortgage payments cover interest only)
- 5 A PEP, ISA or Unit Trust mortgage
- 95 Other type of mortgage or loan
- 96 SPONTANEOUS: interest only mortgage
- 97 SPONTANEOUS: Equity release

*IF type of mortgage or loan = other [HoMTy = 95]*

**HOMTO, HOMTO2 TO HOMTO15\*@**

What other type of mortgage or loan is that?

INTERVIEWER: Write in.  
If interest only then go back and code this at the previous question.  
String 60

END OF FILTER

*IF type of mortgage or loan <> equity [HoMTy <> 97]*

**HORMO1N TO HORMO5N\***

Does this mortgage or loan include any re-mortgage?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (mortgage status = [new mortgage, additional mortgage taken out since last interview, previous mortgage that was missed at last interview]) OR (whether has same mortgage = yes) [(HoDMSt = 2 , 3, 4) OR (HoMSam = 1)]*

**HOMFV1N TO HOMFV5N\***

At the moment, is this mortgage or loan fixed or variable rate?

- 1 Fixed rate
- 2 Variable rate

**HOVML1N TO HOVML5N\***

[^How / Not including the value of his/her endowment, how] much [^do you / does [^name]] currently owe on this mortgage or loan?

Range: 0..9999997

*IF amount owes on mortgage or loan = RESPONSE [HoVml = RESPONSE]*

**[CHECK HO18]**

ELSE

*IF amount owes on mortgage or loan = NONRESPONSE  
[HoVml = NONRESPONSE]*

**HOVMB\*@**

Is it less than [^10000 / 25000 / 50000 / 250000 pounds], more than [^10000 / 25000 / 50000 / 250000 pounds] or what?

**[Bracket results are recoded in HOVMLL1N, HOVMLU1N HOVMLE1N, HOVMLR1N  
TO HOVMLL5N, HOVMLU5N HOVMLE5N, HOVMLR5N]**

END OF FILTER

END OF FILTER

*IF (type of mortgage or loan = [endowment mortgage, part repayment part endowment]) OR type of mortgage or loan (Last interview)=[endowment mortgage, part repayment part endowment]) [(HoMTy = 2, 3) OR (HoMTy (Last int) = 2, 3)]*

**HOVE1N to HOVE5N\***

What is the current value of [^your / [^name's]] endowment?

Range: 0..9999997

**[CHECK HO19]**

*IF (current value of endowment = DONT KNOW) OR (current value of endowment = RF) [HoVe = DONT KNOW OR HoVe = RF]*

**HOVEB\*@**

Is it less than [^10000 / 25000 / 50000 / 250000 pounds], more than [^10000 / 25000 / 50000 / 250000 pounds] or what?

**[Bracket results are recoded in HOVEL1N, HOVEU1N, HOVEE1N, HOVER1N TO HOVEL5N, HOVEU5N, HOVEE5N, HOVER5N]**

END OF FILTER

END OF FILTER

*IF HoTenu="Buymortg" or "ShOwnsh"*

**HOYML1N TO HOYML5N**

How many years does this mortgage or loan have left to run?

Range : 0..50

**[CHECK HO20]**

END OF FILTER

END OF FILTER

MT: check with Steve whether also part of routing above

*IF (QHD.DhSameh = Yes) OR (QHD.DhSameh = No AND HFFW.Refresh = Yes  
AND ((QInit.FWYear - HoMove) > 2) OR (HoMove = NONRESPONSE)) THEN*

**HOMADD**

Thinking about the mortgage(s) that ^[you/name] have just told us about, ^[In the last 2 years / since we last interviewed you], have ^[you/name] increased the amount of money ^[you/name] borrowed on this/these mortgage(s) either by taking out a new mortgage or borrowing more money on an existing mortgage?"

1 Yes

2 No

*IF mortgages increased = yes [if HoMadd = yes]*

**HOMA**

In total how much additional money did ^[you/name] borrow?

INTERVIEWER: Please only count the additional money borrowed, NOT the total value of the mortgage.

Range : 0..500000

*IF (additional mortgage amount = DONT KNOW) OR (additional mortgage amount = RF) [(HoMa = DONT KNOW) OR (HoMa = RF)]*

**HOMAB\*@**

Would it be less than [^50000 / 75000 / 125000 / 500000 pounds], more than [^50000 / 75000 / 125000 / 500000 pounds] or what?

**[Bracket maximum and minimum results are recoded in HOMAL, HOMAU, HOMAE, HOMAR]**

END OF FILTER

**HOMU @**

What did ^[you/name] use the additional funds for?

PROBE : What else?

CODE ALL THAT APPLY.

- 1 Home extention
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other (please specify)

*IF use of funds = other [if HoMU = other specify]*

**HOMUO @**

What did [^you/[^name]] use the additional funds for?

STRING[60]

**[Multiple responses to HOMU are recoded in variables HOMUHE, HOMUHI, HOMUCP, HOMUOC, HOMU95.]**

**[Open responses to HOMU are coded and merged with the multiple responses to HOMU. These merged responses are recoded in variables HOMUMHE, HOMUMHI, HOMUMCP, HOMUMOC, HOMUM85, HOMUM86]**

END OF FILTER

*IF additional fund use = more than one answer [HoMu = (HoMu.CARDINAL > 1) ]*

**HOMUM**

What was the main reason for borrowing additional funds - that is, what was most of the money spent on?

- 1 Home extention
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods

END OF FILTER

END OF FILTER

**HOMREP**

How much are ^[your/name's] monthly repayments for ^[BLANK/all] ^[you/name's] mortgage(s) or loan(s) outstanding on this property, including [the interests and premiums on ^[your/name's] endowments and/any] insurance premiums?"

Range : 0..99997

*If monthly repayments = DK or RF [HoMRep = DK or RF]*

**HOMREPB\* @**

Would it be less than [^50000 / 75000 / 125000 / 500000 pounds], more than [^50000 / 75000 / 125000 / 500000 pounds] or what?

**[Bracket maximum and minimum results are recoded in HOMREPL HOMREPU HOMREPE HOMREPR]**

END OF FILTER

**HOINC\* @**

Does this repayment include any of the following...

INTERVIEWER: Read out each in turn.

Code all that apply.

- 1 ... a mortgage protection policy?
- 2 ... buildings insurance?
- 3 ... contents or possessions insurance?
- 4 ... other extra payments?

96 None of these

**[code maximum 5 out of 5 possible responses]**

**[Multiple responses to HOINC are recoded in: HOINCPP HOINCBI HOINCPI HOINCOT HOINC96]**

**[CHECK HO21]**

*IF (items included in repayment = other) AND ((Whether post-interview editing question <> yes) OR (items included in repayment = EMPTY OR ( items included in repayment = Other))) [Holnc = 4 AND EditQre <> 1 OR HolncZ = EMPTY OR HolncZ = 4]*

**HOINCE\* @**

What else does [^your / [^name's]] repayment include?

WRITE IN

String 60

**[Open responses to HOINCE are coded and merged with the multiple responses to HOINC These merged responses are recoded in variables: Merged variables: HOINCMBI HOINCMPI HOINCM85 HOINCM86 HOINCM96]**

END OF FILTER

**[CHECK HO22]**

*IF (((items included in repayment = mortgage protection policy ) OR (items included in repayment = building insurance)) OR (items included in repayment = contents insurance)) OR (items included in repayment = other extra payments) [(((Holnc = 1) OR (Holnc = 2)) OR (Holnc = 3)) OR (Holnc = 4)]*

**HOINCC\***

How much of [^your / [^name's]] monthly repayment is for those additional items?

Range: 0..9997

END OF FILTER

*IF (number of outstanding mortgages = 1) and (is this a remortgage = no\_ and (increased mortgage since last interview = no or no response) and (ever taken out additional mortgages or loans (last int) = no response) [(HoOutM = 1) AND (QMort[1].HoRmo = No) AND (HoMadd = No OR HoMadd <> RESPONSE) AND (HFFw.HoEvRe <> RESPONSE)]*

**HOEVRE\***

Not including [^your / [^name's]] original mortgage did [^you / [^name]] ever take out any additional mortgages or loans on this property?

- 1 Yes
- 2 No

END OF FILTER

**HOMETSET\*@**

INTERVIEWER: The Mortgages section is finished.

Please enter <1> here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

END OF FILTER

**HOCTA\***

How much Council Tax [^do you / does [^name] / does your household / does [^name's] household] currently pay?

INTERVIEWER: Code how answer given.

- 1 Annual amount
- 2 Instalment
- 3 Percentage
- 4 Does not pay Council Tax

*IF payment of council tax - annual amount of instalment reported = annual amount [HoCTA = 1]*

**HOCTY\*@**

INTERVIEWER: Enter annual amount.

Range: 0..9997

*IF (annual amount of council tax = DONT KNOW) OR (annual amount of council tax = RF) [(HoCTY = DONT KNOW) OR (HoCTY = RF)]*

**HOCTYB\*@**

Is it less than [^500 / 750 / 1000 / 2000 pounds], more than [^500 / 750 / 1000 / 2000 pounds] or what?

***[Bracket results are recoded in HOCTYL HOCTYU HOCTYE HOCTYR @]***

END OF FILTER

ELSE *IF payment of council tax - annual amount of instalment reported = instalment [HoCTA = 2]*

**HOCTI\*@**

INTERVIEWER: Enter amount of instalment.

Range: 0..9997

*IF (amount council tax instalment = DONT KNOW) OR (amount council tax instalment = RF) [(HOCTI = DONT KNOW) OR (HOCTI = RF)]*

**HOCTLB\*@**

Is it less than [^50 / 75 / 100 / 200 pounds], more than [^50 / 75 / 100 / 200 pounds] or what?

**[Bracket results are recoded in HOCTIL, HOCTIU HOCTIE HOCTIR @]**

END OF FILTER

**HOCTN\*@**

How many instalments are there, over the whole year?

Range: 1..50

END OF FILTER

*IF payment of council tax - annual amount of instalment reported <> does not pay Council Tax [HoCTA <> 4]*

**HOCTB\*@**

[^Are you / Is [^name]] allowed Council Tax benefit or rebate, to help pay [^your / his / her] Council Tax?

1 Yes

2 No

*IF whether allowed benefit or rebate to help pay council tax = yes [HoCTB = 1]*

**HOCTBA\*@**

How much was allowed?

Range: 0..9997

*IF (whether allowed benefit or rebate to help pay council tax = DONT KNOW) OR (whether allowed benefit or rebate to help pay council tax = RF) [(HoCTBA = DONT KNOW) OR (HoCTBA = RF)]*

**HOCTBAB\*@**

Was it less than [^50 / 75 / 100 / 200 pounds], more than [^50 / 75 / 100 / 200 pounds] or what?

**[Bracket results are recoded in HOCTBAL HOCTBAU HOCTBAE HOCTBAR @]**

END OF FILTER

**HOCTBP\*@**

What period did this cover?

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months / 13 weeks
- 26 Six months / 26 weeks
- 52 One Year / 12 months / 52 weeks
- 90 Less than one week
- 95 One off / lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END OF FILTER

*IF (payment of council tax = [annual amount, instalments]) AND (household size = 1) [(HoCTA = [1, 2]) AND (HHTot = 1)]*

**HODISC\*@**

[^Did / In addition to [^your / [^name's] benefit, did] [^you / [^name]] receive a 25% single person discount in relation to Council Tax?

- 1 Yes
- 2 No

END OF FILTER

**HOSW\*@**

How much did [^you / name] pay for water and sewerage charges in the last year, that is since [^date a year ago]?

Range: 0..9997

**[CHECK HO23]**

*IF (amount paid for water and sewerage in past year = DONT KNOW) OR (amount paid for water and sewerage in past year = RF) [(HoSW = DONT KNOW) OR (HoSW = RF)]*

**HOSWB\*@**

Was it less than [^50 / 100 / 200 / 500 pounds], more than [^50 / 100 / 200 / 500 pounds] or what?

**[Bracket results are recoded in HOSWL HOSWU HOSWE HOSWR @]**

END OF FILTER

*IF NOT (how occupies accommodation = [rent free, squatting, own it outright]) AND (at least one person named at HoWHN is eligible for interview = yes) [NOT (HoTenu = [5, 6, 1]) AND (HoEli = 1)]*

**HODIFF\***

Many people these days are finding it difficult to keep up with their housing payments.  
In the last 12 months would you say [^you have / [^name] has] had difficulties paying for [^your / his / her] accommodation?

- 1 Yes
- 2 No

**HODIFFT\***

In the last 12 months [^have you / has [^name]] ever found [^yourself / himself /

herself] more than two months behind with [^your / his / her] [^rent / mortgage / mortgage and rent]?

- 1 Yes
- 2 No

#### **HODOC\***

INTERVIEWER: Code whether respondent consulted documents when answering the questions about mortgage / rent.

- 1 Respondent consulted documents
- 2 Respondent did not consult documents

#### **HOINTA\***

INTERVIEWER: How accurate do you think the answers given by the respondent were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

END OF FILTER

#### **HORET\***

INTERVIEWER: Ask or code.

Some accommodation is only available to people over a certain age (usually 55 or 60).

This is sometimes called 'retirement housing'. Is [^your / [^name's]] home retirement housing?

INTERVIEWER: If the respondent seems unsure, code no.

- 1 Yes
- 2 No
- 3 Don't know

*IF whether interviewing at same address as last time <> yes [DhSameH <> 1]*

#### **HORMOV\* @**

People move for many different reasons. In general terms, what were the reasons you moved home?

INTERVIEWER: Probe fully.

CODE ALL THAT APPLY.

- 01 Job relocated
- 02 Moved to start a new job
- 03 Moved to a better area, or one with fewer problems
- 04 Moved to a more suitable home
- 05 Bought own home
- 06 Was evicted, couldn't afford to pay rent or had home repossessed
- 07 Moved for health reasons
- 08 Moved in with partner
- 09 Split from partner
- 10 Moved in with family or friends
- 11 Moved to be nearer family and / or friends
- 12 Other financial reason such as to release capital or couldn't afford to run house
- 95 Other reason (Please specify)

*[Multiple responses to HORMOV are recoded in variables*

**[HORMVJR HORMVNJ HORMVBA HORMVMS HORMVBO HORMVER HORMVHR HORMVPN  
HORMVSP HORMVIF HORMVNF HORMVOF HORMV95]**

*[code maximum 13 out of 13 possible responses]*

*IF reasons moved house = other [HoRMov = 95]*

**HORMOVO\*@**

INTERVIEWER: Please specify the other reason.

String 80

*[Open responses to Hormovo are coded and merged with the multiple responses to These merged responses are recoded in variables HORMVMJR HORMVMNJ HORMVMBA HORMVMMS HORMVMBO HORMVMER HORMVMHR HORMVMPN HORMVMSP HORMVMIF HORMVMNF HORMVMOF HORMVMPC HORMVMNH HORMVMAB HORMO85 HORMO86 HORMO95*

END OF FILTER

*IF more than one reason why moved house [HoRMov.CARDINAL > 1]*

**HORMAIN\***

What was your main reason for moving home?

- 01 [^Job relocated]
- 02 [^Moved to start a new job]
- 03 [^Moved to a better area, or one with fewer problems]
- 04 [^Moved to a more suitable home]
- 05 [^Bought own home]
- 06 [^Was evicted, couldn't afford to pay rent or had home repossessed]
- 07 [^Moved for health reasons]
- 08 [^Moved in with partner]
- 09 [^Split from partner]
- 10 [^Moved in with family or friends]
- 11 [^Moved to be nearer family and/or friends]
- 12 [^Other financial reason such as to release capital or couldn't afford to run house]
- 95 [^Other reason (Please specify)]

*IF main reason moved house = new home more suitable [HoRMain = 4]*

**HORMOVA\* @**

In what way is your new home more suitable?

INTERVIEWER: Probe fully.

CODE ALL THAT APPLY.

- 1 Smaller
- 2 Larger
- 3 Fewer maintenance problems
- 4 More suitable given respondent's health problems
- 5 Other reason (Please specify)

*[Multiple responses to HORMOVA are recoded in variables HORMOSM HORMOLA HORMOFF HORMOSH HORMOOT]*

*[code maximum 5 out of 5 possible responses]*

*IF reasons why new home more suitable = other [HoRMova = 5]*

**HORMOVB\*@**

INTERVIEWER: Please specify the other reason  
String 360

**[Open responses to HORMOVB are coded and merged with the multiple responses to HORMOVA These merged responses are recoded in variables HORMOMSM HORMOMLA HORMOMFP HORMOMSH HORMOMNS HORMOMBQ HORMOMBA HORMOM85 HORMOM86]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF not ((Same accommodation as last time = yes) and (number of rooms (last int) = response))  
[IF NOT(QHD.DhSameH = Yes AND HFFW.HoRoom = RESPONSE)]*

**HOROOM\***

How many rooms [^do you / does [^name] / does your household / does [^name's] household] occupy here, including bedrooms but not counting bathrooms, kitchens and any rooms [^you / he / she] let[^BLANK/s] or sublet[^BLANK/s]?

Range: 1..30

END OF FILTER

*IF not ((Same accommodation as last time = yes) and (when built (last int) = response)) [IF NOT(QHD.DhSameH = Yes AND HFFW.HoOld = RESPONSE)]*

**HOOID\***

When was this property built?

- 1 before 1919
- 2 1919-1944
- 3 1945-1964
- 4 1965-1984
- 5 1985 or later

END OF FILTER

**HOADPT REMOVED**

**HOADC**

SHOW CARD G7

Whether [^you/[^name]] [^use/uses] them or not, does [^your/his/her] home have any of the features on this card?

CODE ALL THAT APPLY

- 01 Wide doorways or hallways
- 02 Ramps or street level entrances
- 03 Hand rails
- 04 Automatic or easy open doors
- 05 Accessible parking or drop off site
- 06 Lift (e.g. in a block of flats)
- 07 Walk in shower (level access or standard shower tray)

- 08 Over bath shower
- 96 None of these

**[CHECK HO24]**

*IF home adaptation = RESPONSE AND home adaptation <> none of these  
[(HoAdC = RESPONSE) AND NOT(HoAdC = 96)]*

**HOADS**

Were any of these features installed specially to assist people with physical impairments or health problems?

- 01 Yes - installed to assist people
- 02 No

END OF FILTER

**HOADD**

SHOW CARD G8

Some homes have special features to assist people who have physical impairments or health problems. Whether [^you/[^name]] [^use/uses] them or not, does [^your/his/her] home have any of the features on this card?

PROBE: What others?

CODE ALL THAT APPLY.

- 01 Stairlift or stair glide
- 02 Alerting devices, such as button alarms to call for help (because of a fall or health problem)
- 03 Bed lever / bed rail
- 04 Hoist
- 05 Toilet equipment/commode
- 06 Bath or shower seat
- 07 Kitchen modifications
- 08 Any other special feature
- 96 None of these

**[CHECK HO25]**

*IF one or more adaptation mentioned*

*[(idx <9) AND (idx IN HoAdC AND HoAdS=yes) OR (idx >= 9 AND (idx-8 IN HoAdD))]*

**HOAI**

SHOW CARD G9

Who paid for the [^adaptation]?

CODE ALL THAT APPLY.

- 01 Health Service (NHS)
- 02 Social Services
- 03 [^You/[^name]] or [^your/his/her] spouse/partner
- 04 Modification was already in the property
- 05 Landlord/care home/sheltered housing association
- 95 Other

*IF who paid for adapatation = other [HOAI = 95]*

**HOAIO**

INTERVIEWER: Please specify

END OF FILTER

*IF who paid for adaptation <> modification already in the property [HOAI<>5]*

**HOAIB**

Can I just check that [^organisation who paid] covered all the costs of the [^adaptation]?

01 Yes covered all costs

02 No

**[CHECK HO27]**

END OF FILTER

END OF FILTER

**| HOAIDPAY\* REMOVED**

**HOPROB @**

SHOW CARD G9

Does [^your / [^name's]] accommodation have any of these problems?

PROBE: What others?

CODE ALL THAT APPLY.

01 Shortage of space

02 Noise from neighbours

03 Other street noise, such as traffic, businesses, factories

04 Too dark, not enough light

05 Pollution, grime or other environmental problems caused by traffic or industry

06 Rising damp in floors and walls

07 Water getting in from roof, gutters or windows

08 Bad condensation problem

09 Problems with electrical wiring or plumbing

10 General rot and decay

11 Problems with insects, mice or rats

12 Too cold in winter

95 Other problems

96 None of these

*[Multiple responses to HOPROB are recoded in variables: HOPROSP HOPRONZ HOPROSN HOPRODK HOPROPO HOPRORD HOPROWA HOPROCP HOPROEP HOPRORO HOPROIN HOPROCO HOPRO95 HOPRO96]*

*[code maximum 14 out of 14 possible responses]*

**[CHECK HO26]**

*IF (problems accommodation has = other) AND ((whether post-interview editing question <> yes) OR (problems accommodation has = EMPTY OR (problems accommodation has = other)))*

*[(HoProb = 95) AND ((EditQre <> 1) OR (HoProZ = EMPTY OR (HoProZ = 95)))]*

**HOPROBO @**

INTERVIEWER: ENTER OTHER PROBLEMS

String 40

*[Open responses to HOPROBO are coded and merged with the multiple responses to HOPROB. These merged responses are recoded in variables: HOPROMSP HOPROMSN]*

**HOPROMDK HOPROMPO HOPROMRD HOPROMWA HOPROMCP HOPROMEP  
HOPROMROHOPROMIN HOPROMCO HOPROMVA HOPROMST HOPROM85  
HOPROM86 HOPROM96]**

END OF FILTER

**HOHAVE**

SHOW CARD G11

At the present time, [^do you / does [^name] / does your household / does [^name's] household] have any of the following items?

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Items that are provided communally may be included.

01 Television

02 Video recorder

03 CD player

04 Deep freeze or fridge freezer (exclude fridge only)

05 Washing machine

06 Tumble Dryer / Washer - Dryer

07 Dish washer

08 Microwave oven

09 Computer

10 On-line-digital / Satellite / Cable Television

11 Phone (landline)

12 DVD player

95 All of these

96 None of these

*[Multiple responses to HOHAVE are recoded in variables: HOHAVTV HOHAVVR HOHAVCD  
HOHAVFF HOHAVWM HOHAVWD HOHAVDW HOHAVMO HOHAVPC HOHAVDT HOHAVPH  
HOHAVDV HOHAV95 HOHAV96]*

*[code maximum 12 out of 14 possible responses]*

*IF household items = none [HoHave = 96]*

**[CHECK HO27]**

ELSE

**[CHECK HO28]**

END OF FILTER

*IF (household items = RESPONSE) AND NOT (household items = none)*

*[(HoHave = RESPONSE) AND NOT (HoHave = 96)]*

**HOHAVB @**

SHOW CARD G11

Did [^you / [^name] / your household / [^name's] household] buy the item / any of the items you've just mentioned in the last two years, that is since [^date two years ago]? [^BLANK / Please only include equipment that you have bought. Do not include subscriptions, call costs or line rental.]

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Do not code if communally provided.

- 01 [^Television]
- 02 [^Video recorder]
- 03 [^CD player]
- 04 [^Deep freeze or fridge freezer (exclude fridge only)]
- 05 [^Washing machine]
- 06 [^Tumble Dryer / Washer Dryer]
- 07 [^Dish washer]
- 08 [^Microwave oven]
- 09 [^Computer]
- 10 [^On-line digital / Satellite / Cable Television]
- 11 [^Phone (landline)]
- 12 [^DVD player]
- 95 [^All of these]
- 96 [^None of these]

*[Multiple responses to HOHAVB are recoded in variables HOHAVBTV HOHAVBVR  
 HOHAVBCD HOHAVBFF HOHAVBWM HOHAVBWD HOHAVBDW HOHAVBMO  
 HOHAVBPC HOHAVBDT HOHAVBPH HOHAVBDV HOHAVB95 HOHAVB96]  
 [code maximum 12 out of 14 possible responses]*

**[CHECK HO29]**

*IF (household items bought in past two years = television) OR (household items bought in past two years = all) [(HoHavB = 1) OR (HoHavB = 95)]*

**HOHV01**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^Television] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package. Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO30]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^100 / 200 / 500 / 1000 pounds], more than [^100 / 200 / 500 / 1000 pounds] or what?

*[Bracket results are recoded in HOHV01L HOHV01U HOHV01E HOHV01R]*

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = video recorder) OR (household items bought in past two years = all) [(HoHavB = 2) OR (HoHavB = 95)]*

**HOHV02**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^Video recorder] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO31]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^75 / 100 / 300 / 750 pounds], more than [^75 / 100 / 300 / 750 pounds] or what?

**[Bracket results are recoded in HOHV02L HOHV02U HOHV02E HOHV02R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = CD player) OR (household items bought in past two years = all) [(HoHavB = 3) OR (HoHavB = 95)]*

**HOHV03**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^CD player] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO32]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^75 / 150 / 300 / 500 pounds], more than [^75 / 150 / 300 / 500 pounds] or what?

**[Bracket results are recoded in HOHV03L HOHV03U HOHV03E HOHV03R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = deep freeze or fridge freezer) OR (household items bought in past two years = all) [(HoHavB = 4) OR (HoHavB = 95)]*

**HOHV04**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^deep freeze or fridge freezer] excluding any interest paid on loans?  
INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO33]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^75 / 150 / 300 / 500 pounds], more than [^75 / 150 / 300 / 500 pounds] or what?

**[Bracket results are recoded in HOHV04L HOHV04U HOHV04E HOHV04R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = washing machine) OR (household items bought in past two years = all) [(HoHavB = 5) OR (HoHavB = 95)]*

**HOHV05**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^washing machine] excluding any interest paid on loans?  
INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO34]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^150 / 250 / 350 / 500 pounds], more than [^150 / 250 / 350 / 500 pounds] or what?

**[Bracket results are recoded in HOHV05L HOHV05U HOHV05E HOHV05R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = tumble dryer / washer dryer) OR*

*(household items bought in past two years = all) [(HoHavB = 6) OR (HoHavB = 95)]*

**HOHV06**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^tumble dryer / washer dryer] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO35]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^100 / 200 / 300 / 500 pounds], more than [^100 / 200 / 300 / 500 pounds] or what?

**[Bracket results are recoded in HOHV06L HOHV06U HOHV06E HOHV06R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = dish washer) OR (household items bought in past two years = all) [(HoHavB = 7) OR (HoHavB = 95)]*

**HOHV07**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^dish washer] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO36]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^100 / 250 / 350 / 500 pounds], more than [^100 / 250 / 350 / 500 pounds] or what?

**[Bracket results are recoded in HOHV07L HOHV07U HOHV07E HOHV07R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = microwave oven) OR (household items bought in past two years = all) [(HoHavB = 8) OR (HoHavB = 95)]*

**HOHV08**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^microwave oven] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO37]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^50 / 100 / 200 / 400 pounds], more than [^50 / 100 / 200 / 400 pounds] or what?

**[Bracket results are recoded in HOHV08L HOHV08U HOHV08E HOHV08R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = computer) OR (household items bought in past two years = all) [(HoHavB = 9) OR (HoHavB = 95)]*

**HOHV09**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^computer] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO38]**

*IF interest paid in total = NONRESPONSE [HoHV = NONRESPONSE]*

**HOHVB@**

Was it less than [^500 / 750 / 1000 / 2000 pounds], more than [^500 / 750 / 1000 / 2000 pounds] or what?

**[Bracket results are recoded in HOHV09L HOHV09U HOHV09E HOHV09R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = on-line digital / satellite / cable TV) OR  
(household items bought in past two years = all) [(HoHavB = 10) OR (HoHavB = 95)]*

**HOHV10**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^on-line digital / satellite / cable TV] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO39]**

*IF interest paid in total = NONRESPONSE [HoHV[10] = NONRESPONSE]*

**HOHVB@**

Was it less than [^500 / 750 / 1000 / 2000 pounds], more than [^500 / 750 / 1000 / 2000 pounds] or what?

**[Bracket results are recoded in HOHV10L HOHV10U HOHV10E HOHV10R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = phone) OR (household items bought in past two years = all) [(HoHavB = 11) OR (HoHavB = 95)]*

**HOHV11**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^phone] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO40]**

*IF interest paid in total = NONRESPONSE [HoHV[11] = NONRESPONSE]*

**HOHVB@**

Was it less than [^25 / 50 / 100 / 150 pounds], more than [^25 / 50 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOHV11L HOHV11U HOHV11E HOHV11R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = DVD player) OR (HoHavB = all)  
[(HoHavB = 12) OR (HoHavB = 95)]*

**HOHV12**

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^DVD player] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO41]**

*IF interest paid in total = NONRESPONSE [HoHV[12] = NONRESPONSE]*

**HOHVB@**

Was it less than [^75 / 150 / 300 / 500 pounds], more than [^75 / 150 / 300 / 500 pounds] or what?

***[Bracket results are recoded in HOHV12L HOHV12U HOHV12E HOHV12R]***

END OF FILTER

END OF FILTER

END OF FILTER

**HOBB**

At the present time do you have an internet connection?

01 Yes

02 No

**HOCO\*@**

Now I have some questions about [^your / [^name's] / you and your household's] spending on some other common items. [^BLANK / Please include the amount spent by all household members]

INTERVIEWER: Enter <1> to continue

Range: 1..1

**HOFOOD\***

First thinking about [^you / [^name]] / your household's / [^name's] household's weekly food bills, approximately how much [^do you / does [^name] / does your household / does [^name's] household usually spend in total on food and groceries - include all food, bread, milk, soft drinks, etc and meals on wheels; exclude pet food, alcohol, cigarettes, takeaways and meals out?]

INTERVIEWER: Write in to nearest £.

If asked, tell respondent to exclude cleaning products.  
Range: 0..9997

**[CHECK HO42]**

*IF (usual amount spent on food per week = DONT KNOW) OR (usual amount spent on food per week = RF) [(HoFood = DONT KNOW) OR (HoFood = RF)]*

**HOFOODB\*@**

Is it usually less than [^30 / 50 / 75 / 150 pounds], more than [^30 / 50 / 75 / 150 pounds] or what?

**[Bracket results are recoded in HOFOODL HOFOODU HOFOODE HOFOODR]**

END OF FILTER

**HOOUTF\***

Approximately how much [^do you / does [^name] / does your household / does [^name's] household] usually spend in a month in total on takeaways and food consumed out of the home - include all food consumed out of the home e.g. restaurants, meals consumed at the workplace etc?

INTERVIEWER: Write in to nearest £.

Range: 0..9997

*IF (usual amount spent every month on eating out = DONT KNOW) OR (usual amount spent every month on eating out = RF) [(HoOutf = DONT KNOW) OR (HoOutf = RF)]*

**HOOUTFB\*@**

Is it usually less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOOUTFL HOOUTFU HOOUTFE HOOUTFR]**

END OF FILTER

**[CHECK HO43]**

**HOMEAL\***

Can I just check, in the last 12 months that is since [^date a year ago] did [^you / [^name]] (or anyone else in [^your / his / her] household) ever cut the size of your meals or skip meals because there wasn't enough money for food?

- 1 Yes
- 2 No

*IF whether cuts size of meals because of lack of money = yes [HoMeal = 1]*

**HOMOFT\***

Did this happen ... READ OUT ...

- 1 ... one or more times per month,
- 2 almost every month,
- 3 most months but not every month,
- 4 or, once or twice in the year?

END OF FILTER

**HOCL\***

The last question about spending is all about how much you actually spent in the last four weeks, whether this was for you or someone else. Thinking of the last four weeks (since [^date four weeks ago]), approximately how much did [^you / [^name] (or a member of this household)] spend on clothes, including outerwear, underwear, footwear and accessories?

INTERVIEWER: Write in to nearest £.

Range: 0..9997

**[CHECK HO44]**

*IF amount spent on clothing in past month = NONRESPONSE [HoCl = NONRESPONSE]*

**HOCLB\*@**

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOCLL HOCLU HOCLE HOCLR]**

END OF FILTER

**HOLEIS\***

SHOWCARD G12

Again, thinking of the last four weeks (since [^date four weeks ago]), approximately how much did [^you / [^name] (or a member of this household)] spend on leisure activities, other than eating out, of the kind listed on this card?

INTERVIEWER: Write in to nearest £.

Range: 0..9997

**[CHECK HO45]**

*IF amount spent on leisure activities in past month = NONRESPONSE [HoLeis = NONRESPONSE]*

**HOLEISB\*@**

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOLEISL HOLEISU HOLEISE HOLEISR]**

END OF FILTER

**HOCTF, HoctFW, HoCtFA, HOCTFAB REMOVED**

**HOTRAN** (*Please see user guide for further details regarding this variable*)

(And) thinking of the last four weeks (since [^date four weeks ago]) ^[BLANK/not including the amount you contributed to a child trust fund], how much money have [^you / [^name] (or a member of this household)] given to relatives or other people outside your household, including money to charity?

INTERVIEWER: Write in to nearest £.

Include all donations to charities, all monetary transfers to individuals (when nothing received in return).

Do not include lottery.

Range: 0..9997

**[CHECK HO46]**

*IF amount given to charity and individuals outside household in past month =  
NONRESPONSE [HoTran = NONRESPONSE]*

**HOTRANB@**

Was it less than [^10 / 30 / 50 / 150 / 500 pounds], more than [^10 / 30 / 50 / 150 / 500  
pounds] or what?

**[Bracket results are recoded in HOTRANL HOTRANU HOTRANE HOTRANR]**

END OF FILTER

*IF charitable donations <> 0 or non response [(HoTran <> 0) OR (HoTran = NONRESPONSE)]*

**HOTRANW @**

Can you tell me who you gave that money to?

CODE ALL THAT APPLY

- 1 Grandchild(ren)
- 2 Own child(ren)
- 3 Other relative
- 4 Charity
- 5 Other non-relative

**[Multiple responses recoded in variables HOTRANGC HOTRANOC HOTRANOR | HOTRANCH  
HOTRANNR]**

*IF gave money to more than one type of recipient [hotranw.cardinal>0]*

**loop of questions for each recipient type**

**HOTRPA @ - see above**

We'd like to know how your gift was shared between ^[recipients mentioned at hotranw]  
INTERVIEWER: enter whether split given as a percentage or monetary amount

- 1 Percentage
- 2 Amount

*IF split of gifts = recorded as percentage [HOTRPA = percentage]*

**HOTRAP @**

What percentage did you give to ^[grandchildren/children/other relatives/charity/other  
nonrelatives]?"

RANGE: 0..100

**[Multiple responses recoded in variables HOTRAPGC HOTRAPOC HOTRAPOR  
HOTRAPCH HOTRAPNR]**

*ELSE IF split of gifts = recorded as amounts [HOTRPA = amount]*

**HOTRAB @**

How much did you give to ^[grandchildren/children/other relatives/charity/other  
nonrelatives]?"

RANGE: 0..1999999

**[Multiple responses recoded in variables HOTRABGC HOTRABOC HOTRABOR  
HOTRABCH HOTRABNR]**

END OF FILTER

END OF FILTER

END OF FILTER

**HOCENH\***

[^Do you / Does [^name]] have any form of central heating in [^your / his / her] accommodation?  
INTERVIEWER: Include storage heaters.

1 Yes

2 No

*IF whether has central heating = Yes [HoCenH = 1]*

**HOCENP\***

Is the central heating fuelled by ...READ OUT...

INTERVIEWER: Code coal, wood etc. as solid fuel.

1 ...mains gas,

2 electricity,

3 solid fuel,

4 oil,

5 or something else?

END OF FILTER

**HOOHEA\* @**

[^Do you / Does [^name]] use any other forms of heating such as ...READ OUT...

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

1 ...gas fire,

2 electric fire,

3 paraffin heaters,

4 open fire (log/wood/coal),

95 or something else? (please specify)

96 SPONTANEOUS: No other heating

*[Multiple responses to HOOHEA are recoded in variables: HOHEAGF HOHEAEF HOHEAPH  
HOHEAOF HOHEA85 HOHEA86 HOHEA96]  
[code maximum 5 out of 6 possible responses]*

**[CHECK HO47]**

*IF (additional forms of heating used = other) [HoOhea = 95]*

**HOOHEO\*@**

INTERVIEWER: RECORD OTHER TYPE OF HEATING

String 60

*[Open responses to Hooheo are coded and merged with the multiple responses to  
HOOHEA. These merged responses are recoded in variables HOHEAMGF HOHEAMEF  
HOHEAMPH HOHEAMOF HOHEAM85 HOHEAM86 HOHEAM96]*

END OF FILTER

**HOFUEL\* @**

SHOW CARD G13

Can I just check, which of these ^[do you/does name] use in ^[your/his/her] home, either for heating or

for any other purpose?

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

1 Mains gas

2 Electricity

3 Coal / Smokeless fuel

4 Paraffin / Bottled gas

5 Oil

6 Wood

95 Other source of fuel or power

*[Multiple responses to HOFUEL are recoded in variables: HOFUELGA HOFUELEL HOFUELCO HOFUELPA HOFUELLOI HOFUELWO HOFUEL95]*

*[Responses to HOFUELO are merged with responses to HOFUEL and recoded into variables: HOFUEZ1 HOFUEZ2 HOFUEMGA HOFUEMEL HOFUEMCO HOFUEMPA HOFUEMOI HOFUEMW0 HOFUEM85 HOFUEM86]*

*[code maximum 7 out of 7 possible responses]*

*IF (household fuel = mains gas) AND (household fuel = electricity)*

*[(HoFuel = 1) AND (HoFuel = 2)]*

#### **HOFSUP**

^[Do you/Does name] get ^[your/his/her] gas and electricity from the same supplier or from different suppliers?

1 Same supplier

2 Different suppliers

*IF whether has same supplier for gas and electricity = same [HoFSup = 1]*

#### **HOFTOG**

And ^[do you/does name] pay for ^[your/his/her] gas and electricity together or separately?

1 Pay together

2 Pay separately

*IF whether pays for gas and electricity together = together [HoFTog = 1]*

#### **HOFPAY**

SHOW CARD G14

Which of these methods ^[do you/does name] use to pay for ^[your/his/her] gas and electricity?

1 Direct debit

2 Monthly / quarterly bill (including standing orders)

3 Pre-payment (key / card or token) meters

4 Included in rent

5 Frequent cash payment (ie more frequent than once a month)

6 Fuel direct / direct from benefits

7 Staywarm scheme

95 Other

*IF method of payment for gas and electricity = direct debit [HoFPay = 1]*

#### **HOFD**

Is ^[your/his/her] gas and electricity direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of direct debit for gas and electricity = monthly [HoFD = 1]*

**HOFDM**

How much is ^[your/his/her] monthly direct debit for ^[your/his/her] gas and electricity?  
Range: 0..999

*IF amount of monthly direct debit for gas and electricity = NONRESPONSE  
[HoFDm = NONRESPONSE]*

**HOFDMB@**

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100 pounds] or what?

**[Bracket results are recoded in HOFDML HOFDMU HOFDME HOFDMR]**

END OF FILTER

ELSE *IF frequency of direct debit for gas and electricity = quarterly [HoFD = 2]*

**HOFDQ**

How much is ^[your/his/her] quarterly direct debit for ^[your/his/her] gas and electricity?  
Range: 0..999

*IF amount of quarterly direct debit for gas and electricity = NONRESPONSE  
[HoFDq = NONRESPONSE]*

**HOFDQB@**

Is it less than [^75 / 150 / 200 / 300 pounds], more than [^75 / 150 / 200 / 300 pounds] or what?

**[Bracket results are recoded in HOFDQL HOFDQU HOFDQE HOFDQR]**

END OF FILTER

END OF FILTER

ELSE *IF method of payment for gas and electricity = bill [HoFPay = 2]*

**HOFB**

Is ^[your/his/her] gas and electricity bill monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of bill for gas and electricity = monthly [HoFB = 1]*

**HOFBMW**

How much is ^[your/his/her] monthly gas and electricity bill during *winter*?  
Range: 0..999

*IF amount of monthly gas and electricity bill in winter = NONRESPONSE*

[*HoFBmw = NONRESPONSE*]

**HOFBMW@**

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100 pounds] or what?

**[Bracket results are recoded in HOFBMW<sub>L</sub> HOFBMW<sub>U</sub> HOFBMW<sub>E</sub> HOFBMW<sub>R</sub>]**

END OF FILTER

**HOFBMS**

And how much is ^[your/his/her] monthly gas and electricity bill during *summer*?  
Range: 0..999

*IF amount of monthly gas and electricity bill in summer = NONRESPONSE*  
[*HoFBms = NONRESPONSE*]

**HOFBMSB@**

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100 pounds] or what?

**[Bracket results are recoded in HOFBMS<sub>L</sub> HOFBMS<sub>U</sub> HOFBMSE HOFBMSR]**

END OF FILTER

ELSE *IF frequency of bill for gas and electricity = quarterly [HoFB = 2]*

**HOFBQW**

How much is ^[your/his/her] quarterly gas and electricity bill during *winter*?  
Range: 0..999

*IF amount of quarterly gas and electricity bill in winter = NONRESPONSE*  
[*HoFBqw = NONRESPONSE*]

**HOFBQWB@**

Is it less than [^75 / 150 / 200 / 300 pounds], more than [^75 / 150 / 200 / 300 pounds] or what?

**[Bracket results are recoded in HOFBQWL HOFBQWU HOFBQWE HOFBQWR]**

END OF FILTER

**HOFBQS**

And how much is ^[your/his/her] quarterly gas and electricity bill during *summer*?  
Range: 0..999

*IF amount of quarterly gas and electricity bill in summer = NONRESPONSE*  
[*HoFBqs = NONRESPONSE*]

**HOFBQSB@**

Is it less than [^75 / 150 / 200 / 300 pounds], more than [^75 / 150 / 200 / 300 pounds] or what?

**[Bracket results are recoded in HOFBQSL HOFBQSU HOFBQSE HOFBQSR]**

END OF FILTER

END OF FILTER

END OF FILTER

ELSE *IF method of payment for gas and electricity = prepay [HoFPay = 3]*

**HOFPW**

In *winter*, how much ^[do you/does name] pay into the gas and electricity meter in an average week (to the nearest pound)?

Range: 0..99

*IF amount pays into gas and electricity meter in average week in winter =  
NONRESPONSE [HoFPw = NONRESPONSE]*

**HOFPWB@**

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds]  
or what?

**[Bracket results are recoded in HOFPWL HOFPWU HOFPWE HOFPWR]**

END OF FILTER

**HOFPS**

And in *summer*, how much ^[do you/does name] pay into the gas and electricity meter  
in an average week (to the nearest pound)?

Range: 0..99

*IF amount pays into gas and electricity meter in average week in summer =  
NONRESPONSE [HoFPs = NONRESPONSE]*

**HOFPSB@**

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds]  
or what?

**[Bracket results are recoded in HOFPSL HOFPSU HOFPSE HOFPSR]**

END OF FILTER

ELSE *IF method of payment for gas and electricity = [included in rent, frequent cash  
payment, direct from benefits, other] [HoFPay = [4, 5, 6, 95]]*

**HOFOW**

In *winter*, how much ^[do you/does name]spend on gas and electricity in an average  
week (to the nearest pound)?

Range: 0..99

*IF amount spent on gas and electricity in average week in winter =  
NONRESPONSE [HoFOw = NONRESPONSE]*

**HOFOWB@**

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds]

or what?

**[Bracket results are recoded in HOFOWL HOFOWU HOFOWE HOFOWR]**

END OF FILTER

### **HOFOS**

And in *summer* how much ^[do you/does name] spend on gas and electricity in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on gas and electricity in average week in summer =  
NONRESPONSE [HoFOs = NONRESPONSE]*

### **HOFOSB@**

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds]  
or what?

**[Bracket results are recoded in HOFOSL HOFOSU HOFOSE HOFOSR]**

END OF FILTER

ELSE *IF method of payment for gas and electricity = staywarm scheme [HoFPay = 7]*

### **HOFSP**

Is ^[your/name's] Staywarm payment weekly, monthly or quarterly?

- 1 Weekly
- 2 Monthly
- 3 Quarterly

*IF frequency of Staywarm payment = weekly [HoFSp = 1]*

### **HOFSW**

How much is ^[your/name's] weekly Staywarm payment for your gas and electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per week =  
NONRESPONSE [HoFSw = NONRESPONSE]*

### **HOFSWB@**

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50  
pounds] or what?

**[Bracket results are recoded in HOFSWL HOFSWU HOFSWE HOFSWR]**

END OF FILTER

END OF FILTER

ELSE *IF frequency of Staywarm payment = monthly [HoFSp = 2]*

### **HOFSM**

How much is ^[your/name's] monthly Staywarm payment for your gas and electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per month =  
NONRESPONSE [HoFSm = NONRESPONSE]*

**HOFSMB@**

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100  
pounds] or what?

**[Bracket results are recoded in HOFSML HOFSMU HOFSME HOFSMR]**

END OF FILTER

ELSE *IF frequency of Staywarm payment = quarterly [HoFSp = 3]*

**HOFSQ**

How much is ^[your/name's] quarterly Staywarm payment for your gas and  
electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per quarter =NONRESPONSE  
[HoFSq = NONRESPONSE]*

**HOFSQB@**

Is it less than [^75 / 150 / 200 / 300 pounds], more than [^75 / 150 /  
200 / 300 pounds] or what?

**[Bracket results are recoded in HOFSQL HOFSQLU HOFSQLE HOFSQLR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF (Household Fuel = mains gas) AND NOT (whether pays for gas and electricity together = together)  
[(HoFuel = 1) AND NOT (HoFTog = 1)]*

**HOGPAY**

SHOW CARD G15

Which of these methods ^[do you/does name] use to pay for ^[your/his/her] gas?

- 1 Direct debit
- 2 Monthly / quarterly bill (including standing orders)
- 3 Pre-payment (key / card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (ie more frequent than once a month)
- 6 Fuel direct/direct from benefits
- 95 Other

*IF method of payment for gas = direct debit [HoGPay = 1]*

**HOGD**

Is ^[your/his/her] gas direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of direct debit for gas = monthly [HoGD = 1]*

**HOGDM**

How much is ^[your/his/her] monthly direct debit for ^[your/his/her] gas?

Range: 0..999

*IF amount of monthly direct debit for gas = NONRESPONSE  
[HoGDm = NONRESPONSE]*

**HOGDMB@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOGDML HOGDMU HOGDME HOGDMR]**

END OF FILTER

ELSE *IF frequency of direct debit for gas = quarterly [HoGD = 2]*

**HOGDQ**

How much is ^[your/his/her] quarterly direct debit for ^[your/his/her] gas?

Range: 0..999

*IF amount of quarterly direct debit for gas = NONRESPONSE  
[HoGDq = NONRESPONSE]*

**HOGDQB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOGDQL HOGDQU HOGDQE HOGDMQR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF method of payment for gas = bill [HoGPay = 2]*

**HOGBP**

Is ^[your/his/her] gas bill monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of bill for gas = monthly [HoGBp = 1]*

**HOGBMW**

How much is ^[your/his/her] monthly gas bill during *winter*?

Range: 0..999

*IF amount of monthly gas bill in winter = NONRESPONSE  
[HoGBmw = NONRESPONSE]*

**HOGBMW@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOGBMWL HOGBMWU HOGBMWE HOGBMWR]**

END OF FILTER

**HOGBMS**

And how much is ^[your/his/her] monthly gas bill during *summer*?

Range: 0..999

*IF amount of monthly gas bill in summer = NONRESPONSE  
[HoGBms = NONRESPONSE]*

**HOGBMSB@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOGBMSL HOGBMSU HOGBMSE HOGBMSR]**

END OF FILTER

ELSE *IF frequency of bill for gas = quarterly [HoGBp = 2]*

**HOGBQW**

How much is ^[your/his/her] quarterly gas bill during *winter*?

Range: 0..999

*IF amount of quarterly gas bill in winter = NONRESPONSE  
[HoGBqw = NONRESPONSE]*

**HOGBQWB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOGBQWL HOGBQWU HOGBQWE HOGBQWR]**

END OF FILTER

**HOGBQS**

And how much is ^[your/his/her] quarterly gas bill during *summer*?

Range: 0..999

*IF amount of quarterly gas bill in summer = NONRESPONSE  
[HoGBqs = NONRESPONSE]*

**HOGBQSB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150

pounds] or what?

**[Bracket results are recoded in HOGBQSL HOGBQSU HOGBQSE HOGBQSR]**

END OF FILTER

END OF FILTER

ELSE IF method of payment for gas = prepay [HoGPay = 3]

**HOGPW**

In winter, how much ^[do you/does name] pay into the gas meter in an average week (to the nearest pound)?

Range: 0..99

IF amount pays into gas meter in average week in winter = NONRESPONSE  
[HoGPw = NONRESPONSE]

**HOGPWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGPWL HOGPWU HOGPWE HOGPWR]**

END OF FILTER

**HOGPS**

And in summer, how much ^[do you/does name] pay into the gas meter in an average week (to the nearest pound)?

Range: 0..99

IF amount pays into gas meter in average week in summer = NONRESPONSE  
[HoGPs = NONRESPONSE]

**HOGPSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGPSL HOGPSU HOGPSE HOGPSR ]**

END OF FILTER

ELSE IF method of payment for gas = included in rent, frequent cash payment, direct from benefits, other [HoGPay = [4, 5, 6, 95]]

**HOGOW**

In winter, how much ^[do you/does name] spend on gas in an average week (to the nearest pound)?

Range: 0..99

IF amount spent on gas in average week in winter = NONRESPONSE  
[HoGOw = NONRESPONSE]

**HOGOWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

*[Bracket results are recoded in HOGOWL HOGOWU HOGOWE HOGOWR]*

END OF FILTER

**HOGOS**

And in *summer* how much ^[do you/does name] spend on gas in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on gas in in average week in summer = NONRESPONSE  
[HoGOs = NONRESPONSE]*

**HOGOSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

*[Bracket results are recoded in HOGOSL HOGOSU HOGOSE HOGOSR]*

END OF FILTER

END OF FILTER

END OF FILTER

*IF (household fuel = electricity) AND NOT (whether pays for gas and electricity together = together)  
[(HoFuel = 1) AND NOT (HoFTog = 1)]*

**HOEPAY**

SHOW CARD G15

Which of these methods ^[do you/does name] use to pay for ^[your/his/her] electricity?

- 1 Direct debit
- 2 Monthly / quarterly bill (including standing orders)
- 3 Pre-payment (key / card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (ie more frequent than once a month)
- 6 Fuel direct/direct from benefits
- 95 Other

*IF method of payment for electricity = direct debit [HoEPay = 1]*

**HOED**

Is ^[your/his/her] electricity direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of direct debit for electricity = monthly [HoED = 1]*

**HOEDM**

How much is ^[your/his/her] monthly direct debit for ^[your/his/her] electricity?

Range: 0..999

*IF amount of monthly direct debit for electricity = NONRESPONSE  
[HoEDm = NONRESPONSE]*

**HOEDMB@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOEDML HOEDMU HOEDME HOEDMR ]**

END OF FILTER

ELSE *IF frequency of direct debit for electricity = quarterly [HoED = 2]*

**HOEDQ**

How much is ^[your/his/her] quarterly direct debit for ^[your/his/her] electricity?  
Range: 0..999

*IF amount of quarterly direct debit for electricity = NONRESPONSE  
[HoEDq = NONRESPONSE]*

**HOEDQB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOEDQL HOEDQU HOEDQE HOEDQR]**

END OF FILTER

END OF FILTER

ELSE *IF method of payment for electricity = bill [HoEPay = 2]*

**HOEB**

Is ^[your/his/her] electricity bill monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of bill for electricity = monthly [HoEB = 1]*

**HOEBMW**

How much is ^[your/his/her] monthly electricity bill during *winter*?  
Range: 0..999

*IF amount of monthly electricity bill in winter = NONRESPONSE  
[HoEBmw = NONRESPONSE]*

**HOEBMWB@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOEBMWL HOEBMWU HOEBMWE HOEBMWR]**

END OF FILTER

**HOEBMS**

And how much is ^[your/his/her] monthly electricity bill during *summer*?  
Range: 0..999

*IF amount of monthly electricity bill in summer = NONRESPONSE  
[HoEBms = NONRESPONSE]*

**HOEBMSB@**

Is it less than [^10 / 25 / 40 / 75 pounds], more than [^10 / 25 / 40 / 75 pounds]  
or what?

**[Bracket results are recoded in HOEBMSL HOEBMSU HOEBMSE HOEBMSR]**

END OF FILTER

ELSE *IF frequency of bill for electricity = quarterly [HoEB = 2]*

**HOEBQW**

How much is ^[your/his/her] quarterly electricity bill during *winter*?  
Range: 0..999

*IF amount of quarterly electricity bill in winter = NONRESPONSE  
[HoEBqw = NONRESPONSE]*

**HOEBQWB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150  
pounds] or what?

**[Bracket results are recoded in HOEBQWL HOEBQWU HOEBQWE HOEBQWR]**

END OF FILTER

**HOEBQS**

And how much is ^[your/his/her] quarterly electricity bill during *summer*?  
Range: 0..999

*IF amount of quarterly electricity bill in summer = NONRESPONSE  
[HoEBqs = NONRESPONSE]*

**HOEBQSB@**

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150  
pounds] or what?

**[Bracket results are recoded in HOEBQSL HOEBQSU HOEBQSE HOEBQSR]**

END OF FILTER

END OF FILTER

END OF FILTER

ELSE *IF method of payment for electricity = prepay [HoEPay = 3]*

**HOEPW**

In winter, how much ^[do you/does name] pay into the electricity meter in an average week (to the nearest pound)?

Range: 0..99

*IF amount pays into electricity meter in average week in winter =*

*NONRESPONSE [HoEPw = NONRESPONSE]*

**HOEPWB @**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEPWL HOEPWU HOEPWE HOEPWR ]**

END OF FILTER

**HOEPS**

And in summer, how much ^[do you/does name] spend pay into the electricity meter in an average week (to the nearest pound)?

Range: 0..99

*IF amount pays into electricity meter in average week in summer =*

*NONRESPONSE [HoEPs = NONRESPONSE]*

**HOEPSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEPSL HOEPSU HOEPSE HOEPSR]**

END OF FILTER

ELSE *IF method of payment for electricity = included in rent, frequent cash payments, direct from benefits, other [HoEPay = 4, 5, 6, 95]*

**HOEOW**

In winter, how much ^[do you/does name] spend on electricity in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on electricity in average week in winter = NONRESPONSE [HoEOw = NONRESPONSE]*

**HOEOWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEOWL HOEOWU HOEOWE HOEOWR]**

END OF FILTER

**HOEOS**

And in summer, how much ^[do you/does name] household spend on electricity in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on electricity in average week in summer = NONRESPONSE  
[HoEOs = NONRESPONSE]*

**HOEOSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEOLS HOEOSU HOEOSE HOEOSR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF Household fuel = coal [HoFuel = 3]*

**HOFCW**

Now thinking about how much coal / smokeless fuel ^[you use/name uses] in ^[your/his/her] home. In *winter*, how much ^[do you/does he/she] spend on coal / smokeless fuel in an average week (to the nearest pound)?

INTERVIEWER: If free coal enter zero.

Range: 0..99

*IF amount spends on coal / smokeless fuel in average week in winter =  
NONRESPONSE [HoFCw = NONRESPONSE]*

**HOFCWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFCWL HOFCWU HOFCWE HOFCWR]**

END OF FILTER

**HOFCS**

And in *summer*, how much ^[do you/does he/she] spend on coal / smokeless fuel in an average week (to the nearest pound)?

INTERVIEWER: If free coal enter zero.

Range: 0..99

*IF amount spends on coal / smokeless fuel in average week in summer =  
NONRESPONSE [HoFCs = NONRESPONSE]*

**HOFCSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFCSL HOFCSU HOFCSE HOFCSR]**

END OF FILTER

END OF FILTER

*IF household fuel = paraffin / bottled gas [HoFuel= 4]*

**HOFPGW**

Now thinking about how much paraffin / bottled gas ^[you use/name uses] in ^[your/his/her] home. In *winter*, how much ^[do you/does he/she] spend on paraffin / bottled gas in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on paraffin/bottled gas in average week in winter =  
NONRESPONSE [HoFPGw = NONRESPONSE]*

**HOFPGWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFPGWL HOFPGWU HOFPGWE HOFPGWR]**

END OF FILTER

**HOFGS**

And in *summer*, how much ^[do you/does he/she] spend on paraffin / bottled gas in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on paraffin / bottled gas in average week in summer =  
NONRESPONSE [HoFPGs = NONRESPONSE]*

**HOFGSBSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFGSL HOFGSU HOFGSE HOFGSR]**

END OF FILTER

END OF FILTER

*IF household fuel = oil [HoFuel = 5]*

**HOFOIW**

Now thinking about how much gas ^[you use/name uses] in ^[your/his/her] home.

In *winter*, how much ^[do you/does he/she] spend on oil in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on oil in average week in winter = NONRESPONSE  
[HoFOIw = NONRESPONSE]*

**HOFOIWBSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFOIWL HOFOIWU HOFOIWE HOFOIWR]**

END OF FILTER

**HOFOIS**

And in *summer*, how much ^[do you/does he/she] spend on oil in an average week (to the

nearest pound)?

Range: 0..99

*IF amount spends on oil in average week in summer = NONRESPONSE  
[HoFOIs = NONRESPONSE]*

**HOFOISB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFOISL HOFOISU HOFOISE HOFOISR]**

END OF FILTER

END OF FILTER

*IF household fuel = wood [HoFuel = 6]*

**HOFWW**

Now thinking about how much wood ^[you use/name uses] in ^[your/his/her] home.

In *winter*, how much ^[do you/does he/she] spend on wood in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on wood in average week in winter = NONRESPONSE  
[HoFWw = NONRESPONSE]*

**HOFWWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFWWL HOFWWU HOFWWE HOFWWR]**

END OF FILTER

**HOFWS**

And in *summer*, how much ^[do you/does he/she] spend on wood in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on wood in average week in summer = NONRESPONSE  
[HoFWs = NONRESPONSE]*

**HOFWSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFWSL HOFWSU HOFWSE HOFWSR]**

END OF FILTER

END OF FILTER

*IF household fuel = other [HoFuel = 95]*

**HOFUELO @**

Which other sources of fuel or power ^[do you/does he/she] use?  
String 50

*[Responses to HOFUELO are merged with responses to HOFUEL and recoded into variables: HOFUEZ1 HOFUEZ2 HOFUEMAG HOFUEMEL HOFUEMCO HOFUEMPA HOFUEMOI HOFUEMW0 HOFUEM85 HOFUEM86]*

### **HOFXW**

Now thinking about how much [^other source of fuel or power used] ^[you use/he/she uses] in your home. In *winter*, how much ^[do you/does he/she] spend on [^other source of fuel or power used] in an average week (to the nearest pound)?

Range: 0.99

*IF amount spends on other fuel in average week in winter = NONRESPONSE  
[HoFXw = NONRESPONSE]*

### **HOFXWB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

***[Bracket results are recoded in hofxwl, hofxwu, hofxwe, hofxwr]***

END OF FILTER

### **HOFXS**

And in *summer*, how much ^[do you/does he/she] spend on [^other source of fuel or power used] in an average week (to the nearest pound)?

Range: 0.99

*IF amount spends on other source of fuel in average week in summer =  
NONRESPONSE [HoFXs = NONRESPONSE]*

### **HOFXSB@**

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

***[Bracket results are recoded in HOFXSL HOFXSU HOFXSE HOFXSR]***

END OF FILTER

END OF FILTER

If had a vehicle at the last interview [if HFFW.HiVeh>=1]

LOOP FOR k:= 1 TO HoVeh (one loop for each vehicle at the previous interview)

### **HOCC @**

At the time of last interview, [^you / [^name]] or someone in [^your / [^name's]] household owned (or was the main user of) a [^make and model of vehicle owned in Last int] [^BLANK / with a [^letter] registration / with a [^letter] registration letter at the beginning / with a [^letter] registration at the end / with a 51/02 new registration number / with a new registration number].

Is that vehicle still owned by you or someone in your household?

[^BLANK / INTERVIEWER: Owner(s) in previous wave: [^name] / [^name] and [^name]

1 Yes, still has vehicle

2 Never had vehicle

3 Had similar vehicle but details incorrect

4 Vehicle has now changed ownership within the household

5 Out of service, sold, given away or keeper no longer in household

6 Not read out as didn't make sense

***[There is a separate variable for responses about each of the car respondent owns.***

***Responses are recoded in HOCC1 to HOCC20]***

END OF FILTER

*IF (number of remaining vehicles since last wave < 1) OR (number of vehicles owned in household (Last int) < 1) OR (number of vehicles owned in household (Last int) = NONRESPONSE)*

*[(NoFOldVeh < 1) OR (HoVeh (Last int) < 1) OR (HoVeh (Last int) = NONRESPONSE)*

### **HOVEH**

How many cars, vans or motorbikes, if any, [^do you / does [^name]] or [^your / his / her] household own (including company, lease or cars owned through motability scheme)?

INTERVIEWER: Include cars owned by people outside the household *only* if the respondent's household is the sole or main user of that car.

Exclude company cars if only available for business use.

Range: 0..20

END OF FILTER

### **HOVEHX**

Can I just check, in total, how many cars, vans or motorbikes, if any, [^do you/does name] own (including company or lease vehicles)?"

Range : 0..20

*IF (number of vehicles owned in household > 0) OR (number of vehicles owned in household (last int) > 0) [(HoVeh > 0) OR (NoFOldVeh > 0)]*

LOOP FOR Idx:= 1 TO 20

*IF ((number of vehicles owned in household + number of vehicles owned in household at Last int) >= Idx) OR (C[Idx - 1].whether owns any other vehicles = yes)*

*[((HoVeh + NoFOldVeh) >= Idx) OR (C[Idx - 1].HoVNew = Yes)]*

*IF status of vehicle reported last time = [still has vehicle, changed ownership]  
[HoVSt = 1, 4]*

*ELSE IF status of vehicle reported last time = [had similar vehicle but details incorrect,  
has new vehicle] [HoVSt = 3, 6]*

*END OF FILTER*

### **HOVST**

Derived: status of vehicle

- 1 Yes, still has vehicle
- 2 Never had vehicle
- 3 Had similar vehicle but details incorrect
- 4 Vehicle has now changed ownership within the household
- 5 Out of service, sold, given away or keeper no longer in household
- 6 New vehicle (since previous wave)

*IF status of vehicle = has similar, or new [if HoVSt = 3 or 6]*

### **HOVM@**

What make and model is the car, van or motorbike?

String 60

### **HOVW**

ASK OR CODE: Is this a car, a van or a motorbike?

- 1 Car
- 2 Van
- 3 Motorbike

*[There is a separate variable for responses about each of the car respondent owns. Response are recoded in HOVW, HOVW2 to HOVW16]*

### **HOVAG**

How old is this [^car / van / motorbike]?

INTERVIEWER: Code here how to record the age of the vehicle.

Record registration year even if bought second hand. If it has a personalised or cherished number plate, record the year the vehicle was registered.

- 1 Answer given in year vehicle was registered
- 2 Answer given in registration letter (Letter at beginning)
- 3 Answer given in registration letter (Letter at the end)
- 4 Answer given in new registration number (Number in middle)

*IF age of vehicle = answer given in year registered [HoVAg = 1]*

### **HOVYR**

INTERVIEWER: Enter the year the vehicle was registered.

Range: 1900..2050

### **[CHECK HO48]**

*ELSE if age of vehicle = answer given in registration letter (letter at beginning) [HoVAg = 2]*

**HOVLR**

INTERVIEWER: Enter the registration letter (the letter at the beginning).  
String 2

*ELSE if age of vehicle = answer given in registration letter (letter at end) [HoVAg = 3]*

**HOVER**

INTERVIEWER: Enter the registration letter (the letter at the end).  
String 2

*ELSE IF age of vehicle = answer given in new registration number [HoVAg = 4]*

**HOVNR**

INTERVIEWER: Code the new registration number (the two digit number in the middle).

Use code 95 for 'other' and specify at the next question

*IF new registration number = other [HoVNr = 95]*

**HOVNO**

INTERVIEWER: Enter the other new registration number.  
Range: 0..99

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF (household size > 1) AND (status of vehicle <> still has vehicle)  
[HHTot > 1 AND HoVSt <> 1]*

**HOVOW @**

[^Who / Can I just check, who] owns this [^car / van / motorbike]?

PROBE: Who else?

CODE ALL THAT APPLY

- 01 [^Person's name[1]]
- 02 [^Person's name[2]]
- 03 [^Person's name[3]]
- 04 [^Person's name[4]]
- 05 [^Person's name[5]]
- 06 [^Person's name[6]]
- 07 [^Person's name[7]]
- 08 [^Person's name[8]]
- 09 [^Person's name[9]]
- 10 [^Person's name[10]]
- 11 [^Person's name[11]]
- 12 [^Person's name[12]]
- 13 [^Person's name[13]]

- 14 [^Person's name[14]]
- 15 [^Person's name[15]]
- 16 [^Person's name[16]]
- 17 [Not a household member]
- 18 [Company/employer]
- 19 [Lease company, including motability scheme]

**[Multiple responses to HOVW are recoded in variables HOVW01 – HOVW19]  
[code maximum 4 out of 19 possible responses]**

**There is a loop for each person**

END OF FILTER

*IF (Sequence number of vehicles >= Number of vechile in feed forward data) AND  
(number of vehicles owned in household <> RESPONSE)  
[PSeq >= PLast AND HoVeh <> RESPONSE]  
(PSeq and PLast are computed variables therefore not included in archive data)*

#### **HOVNEW @**

Are there any (other) vehicles owned by [^you / [^name] (or a member of this household)] (including company, lease or cars owned through motability scheme)?  
INTERVIEWER: Include cars owned by people outside the household *only* if respondent's household is the sole or main user of that car. Exclude company cars if only available for business use.

- 1 Yes
- 2 No

**[There is a separate variable for responses about each of the new car respondent might have. Responses are recoded in HOVNW, HOVNW2 to HOVNW16]**

END OF FILTER

#### **[CHECK HO49]**

END OF FILTER

*IF whether change in number of vehicles since last wave = yes [VehChange = 1]*

#### **HOVEHX**

Can I just check, in total, how many cars, vans or motorbikes, if any, [^do you / does [^name]] own (including company or lease vehicles)?

Range: 0..20

*IF (total number of vehicles = RESPONSE) AND (total number of vehicles > 0) [(HoVehx = RESPONSE) AND (VehTot > 0)]*

#### **[CHECK HO50]**

#### **[CHECK HO51]**

END OF FILTER

END OF FILTER

**HoPet, HoPetWt removed**

**HOX@**

INTERVIEWER: The Housing section is finished.

Please enter <1> here to make the program store the current time and date.

Range: 1..1

## **HO Module Checks**

**HO1 SPARE**

**HO2 HOBA**

*IF amount of last rent = RESPONSE [HoBA = RESPONSE]*

*CHECK: (((period covered by last rent payment = One week) AND  
(amount of last rent <=300)) OR ((period covered by last rent payment =  
two weeks) AND (amount of last rent <= 600))) OR ((period covered by last  
rent payment = [four weeks, one month]) AND (amount of last rent <=  
1200))) OR ((period covered by last rent payment = one year) AND  
(amount of last rent <=15000))  
[((((HoBP = 1 week) AND (HoBA <= 300)) OR ((HoBP = 2 weeks) AND  
(HoBA <= 600))) OR ((HoBP = 4, 5 weeks) AND (HoBA <= 1200))) OR  
((HoBP = 52 weeks) AND (HoBA <= 15000))]*

INTERVIEWER: Are you sure? £[<sup>A</sup>HoBA] seems high - please check.

END CHECK

END OF FILTER

**HO3 HOTENU**

*IF how occupies accommodation = Buying it with the help of a mortgage AND tenure = No  
[HoTenu = 2 AND HoTenuN = 2]*

*CHECK: Wave 1 tenure <> buying with mortgage [HoTenu <> Buymortg]*

The respondent has already said (at HoTenuN) that they are no longer  
buying the accommodation with a mortgage or loan. Please check.

END CHECK

END OF FILTER

**HO4 HORENT**

*IF (amount of last rent repayment = RESPONSE) AND (amount of last rent repayment <> 99997)  
[HoRent = RESPONSE AND HoRent <> 99997]*

*CHECK: (((period covered by last rent payment = 1 week) AND (amount of last rent repayment <=  
300)) OR ((period covered by last rent payment = 2 weeks) AND (amount of last rent repayment*

$\leq 600))$  OR ((period covered by last rent payment = [4 weeks, 1 month]) AND (amount of last rent repayment  $\leq 1200$ )) OR ((period covered by last rent payment = [3 weeks, 2 / 3 / 6 months, 8 / 9 / 10 times a year, 1 year, less than 1 week, lump sum]) AND (amount of last rent repayment  $\leq 15000$ ))  
[((((HoPeri = 1 week) AND (HoRent  $\leq 300$ )) OR ((HoPeri = 2 weeks) AND (HoRent  $\leq 600$ ))) OR ((HoPeri = 4, 5 weeks) AND (HoRent  $\leq 1200$ ))) OR ((HoPeri = 3, 7.. 26, 52, 90, 95 weeks) AND (HoRent  $\leq 15000$ ))]

INTERVIEWER: Are you sure? £[ $\wedge$ HoRent] seems high - please check.

END CHECK

END OF FILTER

## HO5 HOINCL

IF items last rent payment included = none [Holncl = 96]

CHECK: (items last rent payment included = none) AND (items last rent payment included = at least one other item)  
[Holncl = 96 AND Holncl = 1...6]

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## HO6 HOOINC

IF items last rent payment included = none [HolnaZ = none]

CHECK: (items last rent payment included = none) AND (items last rent payment included = at least one other item)  
[HolnaZ = 96 AND HolnaZ = 1...95]

EDITOR: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## HO7 HOREBA

IF (last rent payment if housing benefit not deducted = RESPONSE) AND  
(period rent covers = doesn't make rent payments) [HoReba = RESPONSE AND HoPeri = 97]

CHECK: (((period rent covers = one week) AND (last rent payment if housing benefit not deducted  $\leq 300$ )) OR ((period rent covers = two weeks) AND (last rent payment if housing benefit not deducted  $\leq 600$ ))) OR ((period rent covers = [four weeks, one month]) AND (last rent payment if housing benefit not deducted  $\leq 1200$ ))) OR ((period rent covers = [three weeks, two / three / six months, eight / nine / ten times a year, one year, less than once a week, lump sum]) AND (last rent payment if housing benefit not deducted  $\leq 15000$ ))  
[((((HoPeri = 1 week) AND (HoReba  $\leq 300$ )) OR ((HoPeri = 2 weeks) AND

$(HoReba \leq 600)) \text{ OR } ((HoPeri = 4, 5 \text{ weeks}) \text{ AND } (HoReba \leq 1200)) \text{ OR } ((HoPeri = 3, 7 \dots 26, 52, 90, 95 \text{ weeks}) \text{ AND } (HoReba \leq 15000))$

INTERVIEWER: Are you sure? £[^HoReba] seems high - please check.

END CHECK

END OF FILTER

## HO8 HOHB

*IF services included with accommodation = None [HoHB = 96]*

*CHECK: (services included with accommodation = none) AND (services included with accommodation = at least one other item)  
[HoHB = 96 AND HoHB = 1...95]*

'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## HO9 HOHBO

*IF services included with accommodation = None [HoHBz = None]*

*CHECK: (services included with accommodation = none) AND (services included with accommodation = at least one other item)  
[HoHBz = 96 AND HoHBz = 1...95]*

EDITOR: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## HO10 HOMOVE

## HO11 HOMOVE

## HO12 HOMOVE

*IF (year moved to accommodation = RESPONSE) AND (FWYear = RESPONSE)  
[HoMove = RESPONSE AND FWYear = RESPONSE]*

*CHECK: year moved to accommodation <= FWYear [HoMove <= FWYear]*

INTERVIEWER: This is later than [^fwyear]! Please check!

END CHECK

END OF FILTER

*IF today's date = RESPONSE [IntDat = RESPONSE]*

*CHECK: this year >= year of moving to accommodation [SIntDat.YEAR >= HoMove]*

*INTERVIEWER: This year is in the future (^homove)! Please change!*

*END CHECK*

*END OF FILTER*

*IF person's date of birth = RESPONSE [IDoB[pnum] = RESPONSE]*

*CHECK: person's year of birth <= year of moving to accommodation [IDoB[pnum].YEAR <= HoMove]*

*INTERVIEWER: This is before [^iname] was born! Please check!*

*END CHECK*

*END OF FILTER*

**HO13 HOYEAR**

**HO14 HOYEAR**

**HO15 HOYEAR**

*IF (year bought accommodation = RESPONSE) AND (FWYear = RESPONSE)  
[HoYear = RESPONSE AND FWYear = RESPONSE]*

*CHECK: year bought accommodation <= FWYear [HoYear <= FWYear]*

*INTERVIEWER: This is later than [^fwyear]! Please check!*

*END CHECK*

*END OF FILTER*

*IF today's date = RESPONSE [SIntDat = RESPONSE]*

*CHECK: this year >= year of buying accommodation [SIntDat.YEAR >= HoYear]*

*INTERVIEWER: This year is in the future (^hoyear)! Please change!*

*END CHECK*

*END OF FILTER*

*IF person's date of birth = RESPONSE [IDoB[pnum] = RESPONSE]*

*CHECK: person's year of birth <= year of buying accommodation  
[IDoB[pnum].YEAR <= HoYear]*

*INTERVIEWER: This is before [^iname] was born! Please check!*

*END CHECK*

END OF FILTER

#### **HO16 HOPAY**

*IF amount paid for the property=response [HOPay = RESPONSE]*

*CHECK: amount paid for the property <= 300000 [HoPay <= 300000]*

*INTERVIEWER: Are you sure? £[^HOPay] seems high - please check.*

END CHECK

END OF FILTER

#### **HO17 HOSELLP**

*IF amount expected to get if property sold = RESPONSE [HoSellP = RESPONSE]*

*CHECK: amount expected to get if property sold <= 1000000 [HoSellP <= 1000000]*

*INTERVIEWER: Are you sure? £[^HOSellp] seems high - please check.*

END CHECK

END OF FILTER

#### **HO18 HOVML**

*IF Amount currently owed on mortgage or loan = Response [HoVml = RESPONSE]*

*CHECK: amount currently owed on mortgage or loan <= 500000 [HoVml <= 500000]*

*INTERVIEWER: Are you sure? £[^HOVml] seems high - please check.*

END CHECK

END OF FILTER

#### **HO19 HOVE**

*IF current value of endowment = RESPONSE [HoVe = RESPONSE]*

*CHECK: current value of endowment <= 500000 [HoVe <= 500000]*

*INTERVIEWER: Are you sure? £[^HOVe] seems high - please check.*

END CHECK

END OF FILTER

#### **HO20 HOYML**

*IF (number of years left on mortgage = RESPONSE AND year bought accommodation = RESPONSE)  
AND (FWYear = RESPONSE)  
[(HoYml = RESPONSE AND HoYear = RESPONSE) AND FWYear =RESPONSE]*

*CHECK: (number of years left on mortgage < ((30 + year bought accommodation) - FWYear))  
[HoYml < 30 + HoYear - QInit.FWYear]*

INTERVIEWER: This figure seems high. Please check.

END CHECK

END OF FILTER

## **HO21 HOINC**

*IF items included in repayment = None [HoInc = 96]*

*CHECK: (items included in repayment = none) AND (items included in repayment = at least one other item) [HoInc = 96 AND HoInc = 1...4]*

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## **HO22 HOINCE**

*IF items included in repayment = None [HoIncZ = None]*

*CHECK: (items included in repayment = none) AND (items included in repayment = at least one other item) [HoIncZ = 96 AND HoIncZ = 1...86]*

EDITOR: 'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## **HO23 HOSW**

*IF amount paid for water and sewerage in past year = RESPONSE [HoSW = RESPONSE]*

*CHECK: amount paid for water and sewerage in past year <= 1500 [HoSW <= 1500]*

INTERVIEWER: Are you sure? Rates are normally below £30 a week.

END CHECK

END OF FILTER

## **HO24 HOADC**

*IF special features = None [HoAdpC = None]*

*CHECK: IF (None IN HoAdC) THEN (CARDINAL(HoAdC) = 1)*

'None' is an exclusive code at this question. Please change.

END CHECK

END OF FILTER

## **HO25 HOADD**

*IF special features = none(None IN HoAdD)*

*CHECK :IF (None IN HoAdD) THEN (CARDINAL(HoAdD) = 1)*

'None' is an exclusive code at this question. Please change.

END CHECK

END OF FILTER

## **HO26 HOPROB**

*IF problems accommodation has = None [HoProb = None]*

*CHECK: (problems accommodation has = none) AND (problems accommodation has = at least one other item) [HoProb = 96 AND HoProb = 1...95]*

'None' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

## **HO27 HOAIB**

*IF (HoAiB = No) THEN*

*CHECK: ERROR*

Please go back to HoAi and add who else paid for the ^adaptation[idx].

END CHECK

END OF FILTER

\*\*\*\*\*

**HO28 HOHAVE**

CHECK: (items household has = none) AND (items household has = at least one other code) [HoHave = 96 AND HoHave = 1...95]

'None' is an exclusive code at this question. Please change!

END CHECK

**HO28 HOHAVE**

*IF items household has = all [HoHave = 95]*

CHECK: (items household has = all) AND (items household has = at least one other code) [HoHave = 95 AND HoHave = 1...96]

'All of these' is an exclusive code at this question. Please change!

END CHECK

END OF FILTER

**HO29 HOHAVB**

*IF NOT (items household has = All) [NOT(All IN HoHave)]*

LOOP FOR k:= 1 TO 12

*IF household items bought in past two years = k [HoHavB = k]*

CHECK: (items household has <> IN k) INVOLVING (household items bought in past two years) [(HoHave = k) INVOLVING (HoHavB)]

Code ^k was not selected at HoHave. Remove this code from HoHavB or return to HoHave and enter code ^k.

END CHECK

END OF FILTER

END OF FILTER

END OF FILTER

**HO30 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[1]] seems high - please check.

END CHECK

**HO31 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[2]] seems high - please check.

END CHECK

**HO32 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[3]] seems high - please check.

END CHECK

**HO33 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[4]] seems high - please check.

END CHECK

**HO34 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[5]] seems high - please check.

END CHECK

**HO35 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[6]] seems high - please check.

END CHECK

**HO36 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[7]] seems high - please check.

END CHECK

**HO37 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[8]] seems high - please check.

END CHECK

**HO38 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[9]] seems high - please check.

END CHECK

**HO39 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[10]] seems high - please check.

END CHECK

**HO40 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[11]] seems high - please check.

END CHECK

**HO41 HOHV**

CHECK: amount paid <= 2000 [HoHV <= 2000]

INTERVIEWER: Are you sure? £[^HoHV[12]] seems high - please check.

END CHECK

**HO42 HOFOOD**

*IF usual amount spent on food per week = RESPONSE [HoFood = RESPONSE]*

CHECK: usual amount spent on food per week <= 300 [HoFood <= 300]

INTERVIEWER: Are you sure? £[^hofood] seems high - please check.

END CHECK

END OF FILTER

**HO43 HOOUTFB**

*IF usual amount spent every month on eating out = RESPONSE [HoOutf = RESPONSE]*

CHECK: usual amount spent every month on eating out <= 1000  
[HoOutf <= 1000]

INTERVIEWER: Are you sure? £[^HoOutf] seems high - please check.

END CHECK

END OF FILTER

**HO44 HOCL**

CHECK: amount spent on clothing in past month <= 1000 [HoCl <= 1000]

INTERVIEWER: Are you sure? £[HoCl] seems high - please check.

END CHECK

**HO45 HOLEIS**

CHECK: amount spent on leisure activities in past month <= 1000  
[HoLeis <= 1000]

INTERVIEWER: Are you sure? £[^HoLeis] seems high - please check.

END CHECK

#### **HO46 HOTRAN**

CHECK: amount given to charity and individuals outside household in past month <= 1000 [HoTran <= 1000]

INTERVIEWER: Are you sure? £[^HoTran] seems high - please check.

END CHECK

#### **HO47 HOOHEA**

*IF additional forms of heating used = no other heating [HoOhea = 96]*

CHECK: HoOhea.CARDINAL = 1 [HoOhea.CARDINAL = 1]

INTERVIEWER: 'No other heating' is an exclusive code. Please change!

END CHECK

END OF FILTER

#### **HO48 HOVYR**

CHECK: year of registration <= year of interview [HoVYr <= IIntDat.YEAR]

INTERVIEWER: Please check, you seem to have entered a future year!

END CHECK

#### **HO49 HOVNEW**

LOOP FOR Idy:= 1 TO 16

*IF Idx = C[Idx].HoVOw [Idy = C.HoVOw]*

CHECK: DMName >EMPTY [DMName >EMPTY]

  ^Idy is not a valid person number. Please change!

END CHECK

END OF FILTER

END OF FILTER

#### **HO50 HOVEHX**

IF (HoVehx = RESPONSE) AND (VehTot > 0) THEN

CHECK: (number of vehicles owned in household < calculated number of vehicles in household) [HoVehx < VehTot]

  That is less than the [^VehTot] vehicles covered in the previous table.  
  Please check the answer here or go back to the table.

END CHECK

**HO51 HOVEHX**

CHECK: (number of vehicles owned in household > calculated number of vehicles in household) [HoVehx > VehTot]

That is more than the [ $\wedge$ VehTot] vehicles covered in the previous table.  
Please check the answer here or go back to the table.

END CHECK

END OF FILTER

# English Longitudinal Study of Ageing

Wave Six Interview Questionnaire – 2012 to 2013

## 8 COGNITIVE FUNCTION MODULE (CF)

### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

#### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

#### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

#### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

#### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

#### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

Version 3.0 MARCH 2014

## **COGNITIVE FUNCTION MODULE (CF)**

### **CFINTA @**

In the next section of the interview, we will do some memory and concentration tasks and I will ask about your expectations for the future and how you feel now.

01 Press <1> and <Enter> to continue.

### **CFINT @**

Now we will do the memory and concentration tasks.

Some of them may seem rather easy but others are more difficult so please listen carefully.

The tasks are designed so no-one gets the highest score possible. Please just do the best you can on all of them.

INTERVIEWER: Before starting the tests, make sure respondent has glasses etc if needed.

Press <1> and <Enter> to continue.

Range: 1..1

### **CFDATD**

Please tell me today's date.

INTERVIEWER: Code whether the day of month ([^today's date]) is given correctly.

01 Day of month given correctly

02 Day of month given incorrectly or doesn't know day

### **CFDATM**

INTERVIEWER: Code whether the month ([^today's date]) is given correctly.

01 Month given correctly

02 Month given incorrectly/doesn't know month

### **CFDATY**

INTERVIEWER: Code whether the year ([^today's date]) is given correctly.

01 Year given correctly

02 Year given incorrectly/doesn't know day

### **CFDAY**

And please tell me what day of the week it is today?

CORRECT ANSWER: [^today's day]

01 day of week given correctly

02 day of week given incorrectly/doesn't know day

### **CFPROM, CF PROMO - removed**

### **CFLSINT @**

For the next task the computer will 'read' a list of words which I will ask you to recall.

First I'd like to check that you will be able to hear the computer voice - please listen to this short message.

INTERVIEWER: Press <1> and <Enter> to activate the test message.

### **CFTEST**

INTERVIEWER: If the respondent cannot hear properly, adjust the volume on the laptop, then go back to the previous question and press <Enter> to play the test message again.

INTERVIEWER: If the respondent still cannot hear properly, code that you will read out the list yourself.

01 List read out by computer

02 List read out by interviewer

### **CFWRDS**

*[Fed forward variable: word list used for this respondent.]*

*[Note for users - Respondents were read out one of four lists of words. They were given a different list to the one they were given at the last interview and each respondent in a household was given a different list. Please look at the cognitive function booklet for the four lists of words which were used.]*

*IF how list read out = read by interviewer [CfTest = 2]*

**CFLISST @**

I will now read a set of 10 words. I would like you to recall as many as you can.

We have purposely made the list long so it will be difficult for anyone to recall all the words.

Most people recall just a few.

Please listen carefully to the set of words as they cannot be repeated. When I have finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

INTERVIEWER: If no, explain further.

Read out word list below at a slow steady rate approximately one word every 2 seconds.

[List of words]

After word list has been read out press <1> and <Enter>.

END OF FILTER

*IF how list read out = read by computer [CfTest = 1]*

**CFLIS @**

The computer will now read a set of 10 words. I would like you to recall as many as you can.

We have purposely made the list long so it will be difficult for anyone to recall all the words.

Most people recall just a few.

Please listen carefully to the set of words as they cannot be repeated. When it has finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

INTERVIEWER: If no, explain further.

If yes, press <Enter> to begin test and have booklet ready.

*IF word list used for respondent = Word list A [CfWrds = 1]*

**CFSNDA @**

INTERVIEWER: After the word list has been read out press <Enter>.

[Word list A – see cognitive function booklet]

END OF FILTER

*IF word list used for respondent = Word list B [CfWrds = 2]*

**CFSNDB @**

INTERVIEWER: After the word list has been read out press <1> and <Enter>.

[Word list B – see cognitive function booklet]

END OF FILTER

*IF word list used for respondent = Word list C [CfWrds = 3]*

**CFSNDC @**

INTERVIEWER: After the word list has been read out press <Enter>.

[Word list C – see cognitive function booklet]

END OF FILTER

*IF word list used for respondent =Word list D [CfWrds = 4]*

**CFSNDD @**

INTERVIEWER: After the word list has been read out press <Enter>  
[Word list D – see cognitive function booklet]

END OF FILTER

END OF FILTER

**CFLISEN**

Now please tell me the words you can recall.

[^list of words]

INTERVIEWER: Write the words in the booklet provided. Allow as much time as the respondent wishes, up to 2 minutes. Enter the number of words the respondent correctly recalls.

Range: 0..10

**[CHECK CF1]**

**CFFLUL**

INTERVIEWER: This is the start of the fluid intelligence section.

Press <1> and <Enter> to continue.

**CF200PRE**

Next I'm going to read you several numbers and I'd like you to write them down from left to right. 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 series of numbers, and based on the pattern of numbers 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 middle.

INTERVIEWER: MAKE SURE RESPONDENT HAS PENCIL AND PAPER READY FOR WRITING DOWN THE NUMBERS.

REPEAT INSTRUCTIONS FOR THE RESPONDENT IF NECESSARY.

ALLOW ENOUGH TIME WHEN READING NUMBERS FOR RESPONDENT TO WRITE DOWN SEQUENCE.

For example, if I said the numbers '2...4...6...BLANK' then what number would go in the blank?

CORRECT RESPONSE: 8

INTERVIEWER: IF RESPONDENT DOES NOT GIVE THE CORRECT RESPONSE (8) THEN SAY:  
THE NUMBER 8 GOES IN THE BLANK BECAUSE THE CORRECT ORDER IS 2 4 6 8.

PROBE TO CHECK THAT THE RESPONDENT UNDERSTANDS TASK.

01 Correct

05 Incorrect

06 Respondent doesn't understand instructions

*IF example1 = Incorrect, Respondent doesn't understand instructions OR example1 = DK  
[(CF200pre = Incorrect, Doesn'tUnderInstructions) OR (CF200pre = DK)]*

**CF240**

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.

1...2...BLANK...4

CORRECT RESPONSE: 3

IF THE RESPONDENT SAYS THEY DO NOT KNOW THE ANSWER, RECORD 'DON'T KNOW' (CTRL-K). IF RESPONDENT IS UNABLE TO UNDERSTAND HOW TO DO THE TEST, CODE 6, RATHER THAN (CTRL-K)

- 01 Correct
- 05 Incorrect
- 06 Respondent doesn't understand instructions

*IF example2 = Incorrect, Respondent doesn't understand instructions OR example2 =DK [(CF240 =Incorrect,DoesntUndInstruct) OR (CF240=DK)]*

**CF241**

The correct answer is 3.

INTERVIEWER: PROBE TO CHECK THAT THE RESPONDENT UNDERSTANDS THE TASK

- 01 Continue
- 05 Respondent seems confused or does not understand task

END OF FILTER

END OF FILTER

*IF example 1 = Correct OR example2 = Correct or check respondent understands task = continue [(CF200pre = Correct) OR (CF240 = Correct) OR (CF241 = Cont)]*

**CF242**

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?

INTERVIEWER: MAKE SURE RESPONDENT HAS PENCIL AND PAPER READY FOR WRITING DOWN THE NUMBERS.

REPEAT INSTRUCTIONS IF NECESSARY.

PERMIT AS MUCH TIME AS RESPONDENT WISHES FOR EACH QUESTION. IF THE RESPONDENT HAS NOT GIVEN AN ANSWER AFTER ABOUT A MINUTE, ASK: 'WOULD YOU JUST LIKE TO GO ON TO THE NEXT QUESTION?

Press <1> and <Enter> to continue.

END OF FILTER

**CFFIRND**

Randon number for group of fluid intelligence questions

1..2

*IF ready to begin = continue [CF242 = Cont]*

*IF automatically generated random number =1 [CFFIRnd = 1]*

**CF201G1**

Please write down the following numbers from left to right: 8 . . . BLANK . . . 12 . . . 14.

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.  
INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. IF THE RESPONDENT SAYS THEY DO NOT KNOW THE ANSWER, RECORD CTRL-K. DO NOT RECORD A DON'T KNOW RESPONSE AS UNABLE TO DO.

- 01 Correct answer 10
- 02 Incorrect answer
- 03 Unable to do any of these tests

*IF CF201G1 = answered [(CF201g1 = DK) OR (CF201g1 =Correct,Incorrect)]*

### **CF202H1**

Next, please write down the following numbers: 23 . . . 26 . . . 30 . . . 35 . . . BLANK.  
(Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.)

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT.  
CORRECT RESPONSE: 41

- 01 Correct answer 41
- 02 Incorrect answer

*IF CF202H2 = answered [(CF202h1 = RESPONSE) OR (CF202h1 = DK)]*

### **CF203I1**

Next, please write down the following numbers: 18 . . . 17 . . . 15 . . . BLANK . . . 8.  
Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 12

- 01 Correct answer 12
- 02 Incorrect answer

*IF question set 1 = no questions answered correctly so far [CF216c = 0]*

### **CF204A1**

Next, please write down the following numbers: 6 . . . 7 . . . BLANK . . . 9.  
Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 8

- 01 Correct answer 8
- 02 Incorrect answer

*IF CF204a1 = answered [(CF204a1 = RESPONSE) OR (CF204a1 = DK)]*

### **CF205B1**

Next, please write down the following numbers: 6 . . . BLANK . . . 4 . . . 3.  
Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 5

- 01 Correct answer 5  
02 Incorrect answer

*IF CF205b1 = answered [(CF205b1 = RESPONSE) OR (CF205b1 = DK)]*

**CF206C1**

Next, please write down the following numbers: 5 . . . 8 . . . 11 . . . BLANK.

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 14

- 01 Correct answer 14  
02 Incorrect answer

ENDOF FILTER

ENDOF FILTER

*ELSEIF question set 1 = one question answering correctly [CF216c = 1]*

**CF207D1**

Next, please write down the following numbers: BLANK . . . 4 . . . 6 . . . 8.

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 2

- 01 Correct answer 2  
02 Incorrect answer

*IF CF201D1 = answered [(CF207d1 = RESPONSE) OR (CF207d1 = DK)]*

**CF208E1**

Next, please write down the following numbers: 1 . . . 3 . . . 3 . . . 5 . . . 7 . . . 7 . . . BLANK.

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 9

- 01 Correct answer 9  
02 Incorrect answer

*IF CF208E1 = answered [(CF208e1 = RESPONSE) OR (CF208e1 = DK)]*

**CF209F1**

Next, please write down the following numbers: 18 . . . 10 . . . 6 . . . BLANK . . . 3.

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 4

- 01 Correct answer 4

02 Incorrect answer

END OF FILTER

END OF FILTER

*ELSEIF question set 1 = two questions answering correctly [CF216c = 2]*

**CF210J1**

Next, please write down the following numbers: 17 . . . BLANK . . . 12 . . . 8 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 15

01 Correct answer 15

02 Incorrect answer

*IF CF201J1 = answered [(CF210j1 = RESPONSE) OR (CF210j1 = DK)]*

**CF211K1**

Next, please write down the following numbers: 10 . . . BLANK . . . 3 . . . 1 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 6

01 Correct answer 6

02 Incorrect answer

*IF CF211K1 = answered [(CF211k1 = RESPONSE) OR (CF211k1 = DK)]*

**CF212L1**

Next, please write down the following numbers: 17 . . . 16 . . . 14 . . . 10 . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 2 OR 3

01 Correct answer, either 2 or 3

02 Incorrect answer

END OF FILTER

END OF FILTER

*ELSEIF question set 1 = three questions answered correctly [CF216c = 3]*

**CF213M1**

Next, please write down the following numbers: BLANK . . . 20 . . . 26 . . . 38 . . . 62

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 17

01 Correct answer 17

02 Incorrect answer

*IF CF213M1 = answered [(CF213m1 = RESPONSE) OR (CF213m1 = DK)]*

### **CF214N1**

Next, please write down the following numbers: 5 . . . BLANK . . . 11 . . . 19 . . . 35 . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 7

01 Correct answer 7

02 Incorrect answer

*IF CF214N1 = answered [(CF214n1 = RESPONSE) OR (CF214n1 = DK)]*

### **CF21501**

Next, please write down the following numbers: 70 . . . BLANK . . . BLANK . . . 84 . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT ANSWERS COULD BE 72 & 76 OR 78 & 82

01 Correct answer either 72 & 76 or 78 & 82

02 Incorrect answer

END OF FILTER

*ELSEIF automatically generated number = 2 [CFFIRnd = 2]*

### **CF221G2**

Please write down the following numbers: 7 . . . 10 . . . 13 . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 16

01 Correct answer 16

02 Incorrect answer

*IF CF221G2 = answered [(CF221g2 = DK) OR (CF221g2 =Correct,Incorrect)]*

**CF222H2**

Next, please write down the following numbers: BLANK . . . 13 . . . 15 . . . 18 . . . 22 . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 12

- 01 Correct answer 12
- 02 Incorrect answer

*IF CF222H2 = answered [(CF222h2 = RESPONSE) OR (CF222h2 = DK)]*

**CF223I2**

Next, please write down the following numbers: 18 . . . 17 . . . BLANK . . . 12 . . . 8 . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 15

- 01 Correct answer 15
- 02 Incorrect answer

*IF CF223I2 = answered (CF223i2 = RESPONSE) OR (CF223i2 = DK)*

*IF question set 2 = no questions answered correctly [CF226c = 0]*

**CF224A2**

Next, please write down the following numbers: 4 . . . 5 . . . 6 . . . BLANK . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 7

- 01 Correct answer 7
- 02 Incorrect answer

*IF CF224A2 = answered [(CF224a2 = RESPONSE) OR (CF224a2 = DK)]*

**CF225B2**

Next, please write down the following numbers: 5 . . . 4 . . . 3 . . . BLANK . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 2

- 01 Correct answer 2
- 02 Incorrect answer

*IF CF225B2 = answered [(CF225b2 = RESPONSE) OR (CF225b2 = DK)]*

**CF226C2**

Next, please write down the following numbers: 11 . . . BLANK . . . 15 . . . 17 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 13

01 Correct answer 13

02 Incorrect answer

END OF FILTER

END OF FILTER

*ELSE IF question set 2 = one question answered correctly [CF226c = 1]*

### **CF227D2**

Next, please write down the following numbers: BLANK . . . 15 . . . 13 . . . 11 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 17

01 Correct answer 17,

02 Incorrect answer

*IF CF227D2 = answered (CF227d2 = RESPONSE) OR (CF227d2 = DK)*

### **CF228E2**

Next, please write down the following numbers: 10 . . . 6 . . . 3 . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 1

01 Correct answer 1

02 Incorrect answer

*IF CF228E2 = answered [(CF228e2 = RESPONSE) OR (CF228e2 = DK)]*

### **CF229F2**

Next, please write down the following numbers: 11 . . . 9 . . . 6 . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 2

01 Correct answer 2

02 Incorrect answer

END OF FILTER

END OF FILTER

*ELSEIF question set 2 = two questions answered correctly [CF226c = 2]*

**CF230J2**

Next, please write down the following numbers: 1 . . . 3 . . . 9 . . . BLANK . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank. INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT ANSWER IS 27

- 01 Correct answer 27
- 02 Incorrect answer

*IF CF230J2 = answered [(CF230j2 = RESPONSE) OR (CF230j2 = DK)]*

**CF231K2**

Next, please write down the following numbers: 13 . . . 15 . . . 19 . . . BLANK . Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 27, 35, 25 OR 26

- 01 Correct answer 27, 35, 25 or 26
- 02 Incorrect answer

*IF CF232K2 = answered [(CF231k2 = RESPONSE) OR (CF231k2 = DK)]*

**CF232I2**

Next, please write down the following numbers: 3 . . . 3 . . . 4 . . . 6 . . . 6 . . . 7 . . . BLANK . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT ANSWERS ARE 9 & 9

- 01 Correct answer 9 & 9
- 02 Incorrect answer

END OF FILTER

END OF FILTER

*ELSEIF question set 2 = three questions answered correctly [CF226c = 3]*

**CF233M2**

Next, please write down the following numbers: 6 . . . BLANK . . . 15 . . . 27 . . . 51 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 9

- 01 Correct answer 9
- 02 Incorrect answer

*IF CF233M2 = answered [(CF233m2 = RESPONSE) OR (CF233m2 = DK)]*

**CF234N2**

Next, please write down the following numbers: BLANK . . . 18 . . . 24 . . . 36 . . . 60 .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 15

01 Correct answer 15

02 Incorrect answer

*IF CF234N2 = answered [(CF234n2 = RESPONSE) OR (CF234n2 = DK)]*

**CF235O2**

Next, please write down the following numbers: 60 . . . 33 . . . 24 . . . 21 . . . BLANK .

Now look at the numbers that you just wrote down and tell me the number that belongs in the blank.

INTERVIEWER: DO NOT PROVIDE FURTHER PROMPTS, AND DO NOT GIVE THE CORRECT ANSWER OR TELL THE RESPONDENT IF HIS OR HER ANSWER IS CORRECT. CORRECT RESPONSE: 20

01 Correct answer 20

02 Incorrect answer

END OF FILTER

*IF any questions refused*

*[CF200pre=RF OR CF240=RF OR CF241=RF OR CF242=RF OR CF201g1=RF OR CF202h1=RF OR CF203i1=RF OR CF216c=RF OR CF204a1=RF OR CF205b1=RF OR CF206c1=RF OR CF207d1=RF OR CF208e1=RF OR CF209f1=RF OR CF210j1=RF OR CF211k1=RF OR CF212l1=RF OR CF213m1=RF OR CF214n1=RF OR CF215o1=RF OR CF221g2=RF OR CF222h2=RF OR CF223i2=RF OR CF226c=RF OR CF224a2=RF OR CF225b2=RF OR CF226c2=RF OR CF227d2=RF OR CF228e2=RF OR CF229f2=RF OR CF230j2=RF OR CF231k2=RF OR CF232l2=RF OR CF233m2=RF OR CF234n2=RF OR CF235o2=RF]*

**CFSTOP**

INTERVIEWER: WHY WAS THIS TEST NOT CONDUCTED OR STOPPED PRIOR TO COMPLETION? CODE ALL THAT APPLY

- 01 Insufficient understanding of the instructions
- 02 Physical disability made completing the test impossible
- 03 Attention problems, excessive distraction
- 04 Insufficient time
- 05 Extreme anxiety or discomfort
- 06 Other person present
- 07 Respondent doesn't want to do the test
- 08 Language problems
- 97 Other reasons

END OF FILTER

#### **CFEND**

INTERVIEWER: Please press 1 to set time stamp for end of fluid intelligence questions.  
Press <1> and <Enter> to continue.

#### **CFANIST, CFANI, CFMEM CFLETEN CfLetEO CFMEMS removed**

#### **CFLISD**

A little while ago, you were read a list of words and you repeated the ones you could remember. Please tell me any of the words that you can remember now.

[^list of words]

INTERVIEWER: Write the words in the booklet provided. Allow as much time as the respondent wishes, up to 2 minutes. Enter the number of words the respondent correctly recalls.

Range: 0..10

#### **[CHECK CF2]**

*IF whether respondent able to do the literary test at last interview <> RESPONSE OR No –sight difficulties, No – health problems, No- other reason*

*[(CFLitSK (last interview)<> RESPONSE) OR (CFLitSK (last interview) = nost,nohe,NoOth)]*

#### **CFLITA @**

SHOW CARD H1

The final task in this section is about comprehension. Please turn to card H1. This is a made-up medicine label and does not refer to a real medicine. It is often difficult to read and understand instructions on medicine labels. In a moment, I will ask you to read the card quietly to yourself. I will then ask you some questions about what it says. You do not have to memorise the card, as you will be able to look at it while answering the questions.

INTERVIEWER: Please give the respondents time to read the showcard.

If needed, confirm that they do not need to read the label out loud or memorise what it says.

Press one and <Enter> to continue.

#### **CFLITSK**

INTERVIEWER: Is the respondent able to do the literacy test?

- 01 Yes
- 02 No - sight difficulties
- 03 No - health problems
- 04 No - other (Specify)

*IF whether able to do literacy test = No – Other reason [CfLitSK = 4]*

#### **CFLITSO @**

INTERVIEWER: Record other reason.

String 150

**[Open responses to CFLITSO were coded and then incorporated into CFLITSK.  
CFLITC identifies that an open response was given at CFLITSO and incorporated into  
CFLITSK]**

END OF FILTER

*ELSEIF whether able to do literacy test = Yes [CfLitSK = 1]*

**CFLITB**

Looking at the card, what is the maximum number of days you may take this medicine?

INTERVIEWER: The correct response is 7. If responds with 'one week', probe for number of days. Code whether respondent gives correct or incorrect answer.

01 Correct answer: seven

02 Incorrect answer: any other response

**CFLITC**

Looking at the card, list three situations for which you should consult a doctor.

INTERVIEWER: Respondent should mention at least three of the following. Stop when respondent mentions three:

- (Before giving medication to children with) chicken pox
- (Before giving medication to children with) influenza
- Reyes syndrome
- (During) lactation
- (During) pregnancy,
- If symptoms persist
- (Accidental) overdose

INTERVIEWER: Code whether respondent gives correct or incorrect answer.

01 Correct answer: at least three situations

02 Incorrect answer: any other response

**CFLITD**

Looking at the card, list one condition for which you might take the Medco tablet.

INTERVIEWER: Respondent should mention at least one of the following as conditions for which you could take the tablet:

- Headaches
- Muscle pains
- Rheumatic pains
- Toothache
- Earache
- Common cold

INTERVIEWER: Code whether respondent gives correct or incorrect answer.

01 Correct answer: one correct condition

02 Incorrect answer: any other response

**CFLITE**

Looking at the card, list one condition for which you should not take the Medco tablet.

INTERVIEWER: Respondent should mention at least one of the following as conditions for which you should not take the tablet:

- Gastritis
- Peptic ulcer
- Taking anticoagulant drugs
- Serious liver illness
- Bronchial asthma

INTERVIEWER: Code whether respondent gives correct or incorrect answer.

01 Correct answer: one correct condition

02 Incorrect answer: any other response

END OF FILTER

END OF FILTER

*IF numeracy question CFSUMB at last interview <> RESPONSE  
[CfSumB (last interview) <> RESPONSE]*

### **CFNINT**

Next I would like to ask you some questions which assess how people use numbers in everyday life.

INTERVIEWER: If necessary, encourage the respondent to try to answer each of the numeracy questions.

Press <1> and <Enter> to continue.

### **CFSUMB**

In a sale, a shop is selling all items at half price. Before the sale, a sofa costs £300. How much will it cost in the sale?

01 £150

02 £100

03 £200

04 £250

05 £600

95 Other answer

96 Doesn't know answer

### **CFSUMC**

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

01 100

02 10

03 90

04 900

95 Other answer

96 Doesn't know answer

### **CFSUMD**

A second hand car dealer is selling a car for £6,000. This is two-thirds of what it cost new.

How much did the carcost new?

01 £9,000

02 £2,000

03 £3,000

04 £4,000

05 £8,000

06 £12,000

07 £18,000

95 Other answer

96 Doesn't know answer

*IF numeracy question set 1 = all correct [CfSumB<>Corr AND CfSumC<>Corr AND CfSumD<>Corr]*

**CFSUMA**

If you buy a drink for 85 pence and pay with a one pound coin, how much change should you get back?

- 01 15 pence
- 02 25 pence
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

*[If numeracy set 1 = any correct [CfSumb=Corr OR CfSumC=Corr OR CfSumD=Corr]]*

**CFSUME**

If 5 people all have the winning numbers in the lottery and the prize is £2 million, how much will each of them get?

- 01 £400,000
- 02 £200,000
- 03 £250,000
- 04 £500,000
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

*[If numeracy questions C, D or E = correct [CfSumC=Corr OR CfSumD=Corr OR CfSumE=Corr]]*

**CFSUMF**

Let's say you have £200 in a savings account. The account earns ten per cent interest each year. How much would you have in the account at the end of two years?"

- 01 £242
- 02 £202
- 03 £204
- 04 £210
- 05 £220
- 06 £240
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

END OF FILTER

**CFWHO @**

INTERVIEWER: Was there anyone other than you and the respondent in the room while you were conducting the cognitive function tests?

- 1 No
- 2 Yes - respondent's spouse or partner
- 3 Yes - other household member (adult)
- 4 Yes - other household member (child)
- 5 Yes - not a household member

*[Code maximum 4 out of 5 possible responses]*

*[Multiple responses to cfwho are recoded in variables CFWHONON CFWHOPAR CFWHOAD CFWHOCHI CFWHOOTH]*

**[CHECK CF3]**

**CFIMP**

INTERVIEWER: Were there any factors that may have impaired the respondent's performance on the tests? Include any reasons for letter cancellation not attempted.

1 Yes

2 No

*IF whether other factors impaired performance = Yes [Cflmp = 1]*

**CFWHATI @**

What factors may have impaired the respondent's performance?

CODE ALL THAT APPLY

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has an illness or physical impairment that affects ability to perform the test
- 05 Impaired concentration
- 06 Nervous or anxious
- 07 Other mental impairment
- 08 Interruption or distraction – eg phone call or visitor
- 09 Noisy environment
- 10 Problems with the laptop
- 11 Had difficulty understanding English
- 12 Respondent refused/didn't want to take part
- 13 Distressed/upset e.g. from bereavement
- 14 Memory problems
- 15 Under the influence of alcohol
- 95 Other answer

*[Code maximum 12 out of 12 possible responses]*

*[Multiple responses to CFWHATI are recoded in variables: CFWHTEYE CFWHTHEA  
CFWHTTIR CFWHTTIR CFWHTILL CFWHTCON CFWHTNER CFWHTMEN CFWHTDIS  
CFWHTNOI CFWHTLAP CFWHTENG CFWHTREF CFWHTUPS CFWHTMEM CFWHTALC  
CFWHT95]*

*IF factor impairing performance = other [CFWHATI = 95]*

**CFWHATO @**

INTERVIEWER: Give details of other factor that may have impaired the respondent's performance.

STRING[80]

**CFWHATZ @**

EDITOR: CODE FRAME 56

CFWhat : [^factors which impaired performance]

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has an illness or physical impairment that affects ability to perform the test
- 05 Impaired concentration
- 06 Nervous or anxious
- 07 Other mental impairment
- 08 Interruption or distraction – eg phone call or visitor

- 09 Noisy environment
- 10 Problems with the laptop
- 11 Had difficulty understanding English
- 12 Respondent refused/didn't want to take part
- 13 Distressed/upset e.g. from bereavement
- 14 Memory problems
- 15 Under the influence of alcohol
- 85 Other answer - not codeable 01 to 15
- 86 Irrelevant response - not codeable 01 to 15

**[Code maximum 17 out of 17 possible responses]**

**[Multiple responses to CFWHATZ are recoded in variables CFWHZ1 to CFWHZ9]**

**CFWHATM @**

Merged variable including backcoding

CFWhat : [^factors which impaired performance]

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has an illness or physical impairment that affects ability to perform the test
- 05 Impaired concentration
- 06 Nervous or anxious
- 07 Other mental impairment
- 08 Interruption or distraction – eg phone call or visitor
- 09 Noisy environment
- 10 Problems with the laptop
- 11 Had difficulty understanding English
- 12 Respondent refused/didn't want to take part
- 13 Distressed/upset e.g. from bereavement
- 14 Memory problems
- 15 Under the influence of alcohol
- 85 Other answer - not codeable 01 to 15
- 86 Irrelevant response - not codeable 01 to 15

**[Code maximum 17 out of 17 possible responses]**

**[Multiple responses to CFWHATM are recoded in variables CFWHMEYE CFWHMHEA  
CFWHMTIR CFWHMILL CFWHMCON CFWHMNER CFWHMMEN CFWHMDIS  
CFWHMNOI CFWHMLAP CFWHM85 CFWHM86]**

END OF FILTER

END OF FILTER

**CFTSET @**

INTERVIEWER: The Cognitive Function section is finished. Please enter 1 here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

## **CF Module checks**

### **CF1 CFLISEN**

*IF (number of words correctly recalled = RESPONSE) OR (number of words correctly recalled = EMPTY) [CfLisEn = RESPONSE OR CfLisEn = EMPTY]*

INTERVIEWER: Please enter the number of words the respondent correctly recalls.

END OF FILTER

### **CF2 CFLISD**

*IF (number of words recalled after delay = RESPONSE) OR number of words recalled after delay = EMPTY [CfLisD = RESPONSE OR CfLisD = EMPTY]*

INTERVIEWER: Please enter the number of words the respondent correctly recalls.

END OF FILTER

### **CF3 CFWHO**

*IF whether anyone else was present = No [CfWho = 1]*

CHECK: whether anyone else was present = No AND whether anyone else was present = Yes [CfWho = 1 AND CfWho = 2...5]

INTERVIEWER: 'No' is an exclusive code. Please change!

END CHECK

END OF FILTER

# English Longitudinal Study of Ageing

Wave Six Interview Questionnaire – 2012 to 2013

## 9 EXPECTATIONS MODULE (EX)

### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

#### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

#### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

#### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or “press 1 and continue” variables) – see User Guide for more information.

#### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

#### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## **EXPECTATIONS MODULE (EX)**

### **EXEVNT @**

SHOW CARD J1

Now I have some questions about how likely you think various events might be. When I ask a question I'd like you to give me a number from 0 to 100, where 0 means that you think there is absolutely no chance an event will happen, and 100 means that you think the event is absolutely certain to happen.  
1 Press <1> and <Enter> to continue.

### **EXRAIN**

SHOW CARD J1

Let's try an example and start with the weather. What do you think the chances are it will be rainy tomorrow? (where 100 means a 100 percent chance of rainy weather and you can say any number from 0 to 100. For example, if you think there is a good chance that it will be rainy tomorrow, you might say there is an 80 percent chance of rain.)

Range: 0..100

### **EXMOVHA**

SHOW CARD J1

What are the chances that you will move out of your current home at some time in the future?

INTERVIEWER: I.e. this person will change their permanent residence. Includes buying, renting, moving into a nursing home or other institution, current holiday home or going to live with someone else. Do not include moving between properties or living abroad some months of the year  
Range: 0..100

### **EXLO80**

SHOW CARD J1

What are the chances that you will live to be [^Age1Txt] or more?

Range: 0..100

*IF aged 65 or under [IAgeof <= 65], ^age1txt = 75.*

*ELSEIF aged 69 or under [IAgeof <= 69], ^age1txt = 80.*

*ELSEIF aged 74 or under [IAgeof <= 74], ^age1txt = 85.*

*ELSEIF aged 79 or under [IAgeof <= 79], ^age1txt = 90.*

*ELSEIF aged 84 or under [IAgeof <= 84], ^age1txt = 95.*

*ELSEIF aged 99 or under [IAgeof <= 99], ^age1txt = 100.*

*ELSEIF aged 104 or under [IAgeof <= 104], ^age1txt = 105.*

*ELSEIF aged 109 or under [IAgeof <= 109], ^age1txt = 110.*

*ELSEIF aged 119 or under [IAgeof <= 119], ^age1txt = 120.*

*IF age of respondent < 70 AND chances of living to be 11-15 years older > 0 or DK*

### **EXLO90**

SHOW CARD J1

What are the chances that you will live to be 85 or more?

Range: 0..100

END OF FILTER

*IF (respondent's sex = female AND respondent's age < 60) OR (respondent's sex = male AND respondent's age < 65) [(ISex = 2 AND IAgeOf < 60) OR (ISex = 1 AND IAgeOf < 65)]*

### **EXPW**

SHOW CARD J1

Thinking about paid work in general [^/, and not just your present job] what are the chances that you will be working after you reach age [^AgeTxt]?

Range: 0..100

IF (respondent's sex = female AND respondent's age <= 54) [/Sex = Female AND IAgeof <= 54], ^agetxt = 55.

ELSEIF (respondent's sex = female AND respondent's age <= 59) [/Sex = Female AND IAgeof <= 59], ^agetxt = 60.

ELSEIF (respondent's sex = male AND respondent's age <= 59) [/Sex = Male AND IAgeof <= 59], ^agetxt = 60.

ELSEIF (respondent's sex = male AND respondent's age <= 64) [/Sex = Male AND IAgeof <= 64], ^agetxt = 65.

IF (chances of working after reaching age AgeTxt > 0) OR (chances of working after reaching age AgeTxt = DK) [ExPW > 0 OR ExPW = DK]

#### **EXPWF**

SHOW CARD J1

If you **were** doing any paid work after you reached age [^AgeTxt], what are the chances that this would be for 35 hours a week or more, that is, full-time?

Range: 0..100

[Routing for textfill ^AgeTxt same as for EXPW above]

END OF FILTER

END OF FILTER

IF (activities done in past month = paid work OR activities done in past month = self-employment OR status of unemployment in past month = temporarily away from paid work) AND respondent's age < 65 [(WpAct = 1 OR WpAct = 2 OR WpAway = 1) AND IAgeOf < 65]

#### **EXHLIM**

SHOW CARD J1

What are the chances that your health will limit your ability to work before you reach age 65?

Range: 0..100

END OF FILTER

#### **EXRSLF**

SHOW CARD J1

What are the chances that at some point in the future you will not have enough financial resources to meet your needs?

Range: 0..100

IF age < 75

#### **EXAINH**

SHOW CARD J1

Including property and valuables, what are the chances that you will **receive** any inheritance during the next 10 years?

Range: 0..100

*IF (expected inheritance > 0) OR (expected inheritance = DK) [ExAInh > 0 OR ExAInh = DK]*

**EXCINH**

SHOW CARD J1

What are the chances that you will **receive** an inheritance totalling £10,000 or more during the next 10 years?

Range: 0..100

*IF (expected inheritance over £10,000 = DK) OR (expected inheritance over £10,000 > 0) [ExCinh = DK OR ExCinh > 0]*

**EXINHE**

SHOW CARD J1

What are the chances that you will **receive** an inheritance totalling £100,000 or more during the next 10 years?

Range: 0..100

END OF FILTER

END OF FILTER

END OF FILTER

**EXCIN**

SHOW CARD J1

Including property and other valuables that you [^BLANK / and your husband / wife / partner] might own, what are the chances that you [^BLANK / and your husband / wife / partner] will **leave** an inheritance totalling £50,000 or more?

Range: 0..100

*IF (chance of leaving an inheritance = RESPONSE) AND (chances of leaving an inheritance totalling £50,000 or more = 0) OR (chances of leaving an inheritance totalling £50,000 or more = DK) [EXCIN = RESPONSE AND (ExCin = 0 OR ExCin = DK)]*

**EXCAIN**

SHOW CARD J1

What are the chances that you [^BLANK / and your husband / wife / partner] will **leave** any inheritance?

Range: 0..100

END OF FILTER

*IF chances of leaving an inheritance totalling £50,000 or more > 0 [ExCin > 0]*

**EXCPIN**

SHOW CARD J1

What are the chances that you [^BLANK / and your husband / wife / partner] will **leave** an inheritance totalling £150,000 or more?

Range: 0..100

END OF FILTER

**[CHECK EX1]**

*IF house tenure = own outright, buying with help of mortgage / loan, paying part rent part mortgage and institutional respondent <> Yes [HoTenu = 1, 2, 3] AND (IAskInst[pnum] <> Yes)*

**EXHVR (computed variable)**

Random allocation of text for ExHVa ("increase" or "decrease", "5" or "10" %)

- 1 Increase by 5%
- 2 Increase by 10%
- 3 Decrease by 5%
- 4 Decrease by 10%

**EXHVA [see variable EXHVR above as well]**

SHOW CARD J1

What are the chances that the value of your house will [<sup>^</sup>increase / decrease] by more than  
[<sup>^</sup>5% / 10%] over the next year?

INTERVIEWER: Code 997 if respondent does not own their house.

Range: 0..997 |

**[CHECK EX2]**

END OF FILTER

**EXNHEV**

SHOW CARD J1

There is a lot of government interest currently in the issue of financing social care and nursing homes. To help us understand this issue better it is important to understand whether people are expecting to pay for any future long-term care. We would like to ask you some questions about your expectations regarding future long-term care.

What are the chances that you will **ever** move to a **nursing home**?

INTERVIEWER: Nursing homes are institutions primarily for people who need constant nurse supervision or are unable to live independently. Nursing supervision must be provided on a continuous basis for an institution to qualify as a nursing home.

Probe for answer, ask respondent to ignore whether they actually want to or are planning to move to a nursing home.

Range: 0..100

**EXLTCEV**

SHOW CARD J1

And what are the chances that you will **ever** have to **pay for long term care**, either in a nursing home or care received at home?

Probe for answer, ask respondent to ignore whether they actually want to or are planning to pay for long term care.

Range: 0..100

*IF respondent > = 60 years [IAgeof[spno] >= 60]*

*IF chances of moving to a nursing home > 0 [ExNHEv > 0]*

**EXMOVNB**

SHOW CARD J1

What are the chances that you will move to a **nursing home in the next five years**?

INTERVIEWER: Nursing homes are institutions primarily for people who need constant nurse supervision or are unable to live independently. Nursing supervision must be provided on a continuous basis for an institution to qualify as a nursing home.  
Probe for answer, ask respondent to ignore whether they actually want to or are planning to move to a nursing home.  
Range: 0..100

END OF FILTER

*IF chances of ever having to pay for long term care >0 [ExLTCEv > 0]*

**EXLTC5**

SHOW CARD J1

What are the chances that you will have to **pay for long term care**, either in a nursing home or care received at home, **in the next 5 years?**

Probe for answer, ask respondent to ignore whether they actually want to or are planning to pay for long term care.

Range : 0..100

END OF FILTER

END OF FILTER

**EXRELA**

SHOW CARD J2

Looking at this card, please say how often you find you have too little money to spend on what you feel [^your / you and your household's] needs are?

- 01 Never
- 02 Rarely
- 03 Sometimes
- 04 Often
- 05 Most of the time

**EXRELB EXRELC EXRELD removed**

**EXRELE @**

SHOW CARD J3

Does having too little money stop you from doing any of the following things?

INTERVIEWER: Code all that apply.

- 01 Buy your first choices of food items
- 02 Have family and friends round for a drink or meal
- 03 Have an outfit to wear for social or family occasions
- 04 Keep your home in a reasonable state of decoration
- 05 Replace or repair broken electrical goods
- 06 Pay for fares or other transport costs to get to and from places you want to go
- 07 Buy presents for friends or family once a year
- 08 Take the sorts of holidays you want
- 09 Treat yourself from time to time
- 96 None of these

*[Code maximum 9 out of 10 possible responses]*

*[Multiple responses to EXRELE are recoded in variables EXRELEFO EXRELEME EXRELEOU EXRELEDE EXRELEEL EXRELEFA EXRELEPR EXRELEHO EXRELETR]*

**[CHECK EX3]**

## **EXTSET @**

INTERVIEWER: The Expectations section is finished.  
Please enter 1 here to make the program store the current time and date.  
Range: 1..1  
[Don't Know and Refusal are not allowed]

## ***EX Module checks***

### **EX1 EXCIN**

*IF chance of leaving inheritance greater than £50,000 = RESPONSE AND chance of leaving any inheritance = RESPONSE [(ExCin = RESPONSE) AND (ExCpin = RESPONSE)]*

*CHECK: ExCin >= ExCpin*

The value entered at ExCpin must be less than or equal to the value entered at ExVin (^ExCin)

END CHECK

END OF FILTER

### **EX2 EXHVA**

*IF chances that the value of the interviewee's house will increase / decrease by more than 5% / 10% over the next year = RESPONSE [ExHVa = RESPONSE]*

*CHECK: chances that the value of the interviewee's house will increase / decrease by more than 5% / 10% over the next year <> [0 .. 100, 997]  
[ExHVa <> 0 - 100, 997]*

*^Response to exhva is not a valid answer! Please change!*

END CHECK

END OF FILTER

### **EX3 EXRELE**

*IF things respondent is unable to do = none (ExRele=96)*

*CHECK (ExRele.CARDINAL = 1)*

INTERVIEWER: 'None of these' is an exclusive code, please amend.

END CHECK

END OF FILTER



# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 10 EFFORT AND REWARD (OF VOLUNTEERING AND CARING) MODULE (ER)

#### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

##### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

##### **Routing**

<> - This annotation is used to indicate 'not equals to'.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

##### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information.

##### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. "[CHECK ER2J]") and the details of the checks are given at the end of document.

##### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## **EFFORT AND REWARD (OF VOLUNTEERING AND CARING) MODULE (ER)**

### **ERIN @**

I'd like now to ask you about voluntary work and helping others.

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

### **ERFVIN @**

INTERVIEWER: READ OUT SLOWLY:

First, I'd like you to think about any groups, clubs or organisations that you've been involved with during the last 12 months. That's anything you've taken part in, supported, or that you've helped in any way, either on your own or with others. Please exclude giving money and anything that was a requirement of your job

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

### **ERFVOL @**

SHOW CARD K1

In the last 12 months, that is, since ^[date one year ago], have you given any unpaid help to any groups, clubs or organisations in any of the ways shown on this card?

CODE ALL THAT APPLY. PROBE 'What else?'

- 01 Raising or handling money/taking part in sponsored events
- 02 Leading the group/member of a committee
- 03 Organising or helping to run an activity or event
- 04 Visiting people
- 05 Befriending or mentoring people
- 06 Educating/teaching/coaching
- 07 Providing information/counselling
- 08 Secretarial, admin or clerical work
- 09 Providing transport/driving
- 10 Representing
- 11 Campaigning
- 12 Other practical help (e.g. helping out at school, shopping)
- 95 Any other help (PROBE FIRST)
- 96 None of these

**[Multiple responses to ERFVOL are recoded in variables: ERFVOLMO ERFVOLLE ERFVOLOR ERFVOLVI ERFVOLBE ERFVOLED ERFVOLIN ERFVOLSE ERFVOLTR ERFVOLRE ERFVOLCA ERFVOLPR ERFVOL95 ERFVOL96]**

### **CHECK ER1**

*IF voluntary activities in the last year <> none [ErFVol <> none]*

#### **ERFVOFT**

Overall, about how often over the last 12 months, since ^[date one year ago], have you generally done something to help this/these organisation(s) – remember to include any time spent at home or elsewhere helping this/these organisation(s). Would you say...

READ OUT...

- 01 ...at least once a week,
- 02 less than once a week but at least once a month,
- 03 or less often?
- 04 One-off activity

END OF FILTER

**ERIVIN @**

Now I want to ask you about any unpaid help you, as an individual, may have given to other people, that is apart from any help given through a group, club or organisation.

This could be help for a friend, neighbour or someone else, but not a relative.

INTERVIEWER: Press <1> and <Enter> to continue."

Range: 1..1

**ERIVOL @**

SHOW CARD K2

In the last 12 months, that is, since ^[date one year ago], have you done any of these things, unpaid, for someone who was not a relative?

CODE ALL THAT APPLY.

- 01 Keeping in touch with someone who has difficulty getting out and about (visiting in person, telephoning or emailing)
- 02 Doing shopping, collecting pension or paying bills
- 03 Cooking, cleaning, laundry, gardening or other routine household jobs
- 04 Decorating or doing any kind of home or car repairs
- 05 Babysitting or caring for children
- 06 Sitting with or providing personal care (washing, dressing) for someone who is sick or frail
- 07 Looking after a property or a pet for someone who is away
- 08 Writing letters or filling in forms
- 09 Representing someone (for example talking to a council department, or to a doctor)
- 10 Transporting or escorting someone (for example to a hospital or to an outing)
- 96 No help given in the past 12 months

*[Multiple responses to ERIVOL are recoded in variables ERIVOLKE ERIVOLSH ERIVOLCO ERIVOLDE ERIVOLBA ERIVOLPE ERIVOLPR ERIVOLWR ERIVOLRE ERIVOLTR ERIVOL96]*

**CHECK ER2**

*IF voluntary personal help <> none [if ErVol <> none]*

**ERIVOFT**

In the last 12 months, that is, since ^[date one year ago], about how often have you done this kind of thing/all the things you have mentioned. Would you say...

READ OUT...

- 01 ...every day,
- 02 at least once a week,
- 03 less than once a week but at least once a month,
- 04 or less often?
- 05 One-off activity

END OF FILTER

*IF (activities done in past month = voluntary work) OR (frequency of doing voluntary work = RESPONSE AND frequency of doing voluntary work <> never) OR NOT(unpaid help offered to groups, clubs and organisations = none) OR NOT (unpaid help offered to non-relatives = none)*

*[WpAct = 3 OR (WpVW = RESPONSE AND WpVW<>6) OR NOT (ErFVol = 96) OR NOT (ErVol = 96)]*

**ERINTV @**

I will now read a couple of statements that are related to your commitment towards voluntary work and helping other people. Please tell me whether you strongly agree, agree, disagree,

or strongly disagree with each statement.

Press <1> and <Enter> to continue.

Range: 1..1

### **ERVOLA**

#### SHOW CARD K3

Considering all the efforts that I have put into my voluntary work or helping others, I am fully satisfied with what I have achieved so far.

INTERVIEWER: Press <F9> to see a help screen containing a further definition of 'voluntary work'.

Would you say that you strongly agree, agree, disagree or strongly disagree?

HELP SCREEN F9: DEFINITION OF VOLUNTARY WORK:

Voluntary work is any unpaid activity intended to help or support an organisation or an individual unrelated to the respondent.

01 Strongly agree

02 Agree

03 Disagree

04 Strongly disagree

### **ERVOLB**

#### SHOW CARD K3

Considering all the efforts that I have put into my voluntary work, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

01 Strongly agree

02 Agree

03 Disagree

04 Strongly disagree

END OF FILTER

*IF not in an institution (NB changed routing from W5 - no longer reliant on answer at work status question WpAct)*

### **ERCAA**

Did you look after anyone in the past week. This could be your partner or other people in your household or someone in another household?

INTERVIEWER: By 'look after' we mean the active provision of care.

01 Yes

02 No

*IF whether looked after anyone in past week = Yes [ErCAA = 1]*

### **ERCAB @**

What relation is this person or people to you?

CODE ALL THAT APPLY.

01 Spouse or partner

02 Child

03 Grandchild

04 Parent

05 Parent in law

06 Other relative

07 Friend or neighbour

95 Other

**[Code maximum 8 out of 8 possible responses]**

**[Multiple responses to ERCAB are recoded in variables: ERCABSP ERCABCH  
ERCABGC ERCABPA ERCABPL ERCABOR ERCABFR ERCABOT]**

*IF (relationship to person / people = other) [ErCAB = 95]*

**ERCAZ @**

INTERVIEWER: Enter details of other person(s) who they cared for.

String 60

**[Open responses to ERCAZ are coded and merged with the multiple responses to  
ERCAB These merged responses are recoded in variables: ERCAMSP ERCAMCH  
ERCAMGC ERCAMPA ERCAMPL ERCAMOR ERCAMFR ERCAM85 ERCAM86]**

END OF FILTER

*IF relationship to person <> spouse or partner [ErCAB = 2...95] ErCABNum repeated for  
each type of person mentioned*

**ERCABNUM @**

How many ^people[idx] did you look after in the past week?

**[Responses for each type of person recoded in variables: ERCANSP ERCANCH  
ERCANGC ERCANSPA ERCANSPL ERCANOR ERCANFR ERCANOT ERCANTT]**

CHECK ER3

END OF FILTER

*IF derived number of people looked after in past week > 0 [ErTotNum > 0] @ (named  
ertotcn in the data)*

**ERCALIVE**

[^Does the person / Do any of the people] you care for live with you?

1 Yes

2 No

*IF whether lives with person cared for = Yes [ErCALive = 1]*

**ERCADPN @**

INTERVIEWER: Enter the person number of each person who was cared for.

CODE ALL THAT APPLY.

- 01 [^Name of person living in household - [01]]
- 02 [^Name of person living in household - [02]]
- 03 [^Name of person living in household - [03]]
- 04 [^Name of person living in household - [04]]
- 05 [^Name of person living in household - [05]]
- 06 [^Name of person living in household - [06]]
- 07 [^Name of person living in household - [07]]
- 08 [^Name of person living in household - [08]]
- 09 [^Name of person living in household - [09]]
- 10 [^Name of person living in household - [10]]
- 11 [^Name of person living in household - [11]]
- 12 [^Name of person living in household - [12]]

13 [^Name of person living in household - [13]]  
14 [^Name of person living in household - [14]]  
15 [^Name of person living in household - [15]]  
16 [^Name of person living in household - [16]]  
**[Code maximum 16 out of 16 possible responses]**

**[Multiple responses to ERCADBPN are recoded in variables: ERCADP1 ERCADP2  
ERCADP3 ERCADP4 ERCADP5 ERCADP6 ERCADP7 ERCADP8 ERCADP9  
ERCADP10 ERCADP11 ERCADP12 ERCADP13 ERCADP14 ERCADP15 ERCADP16]**

END OF FILTER

END OF FILTER

### **ERCAC**

How many hours in the past week did you do this?

INTERVIEWER: If 'all the time', enter 168.

Range: 0..168

END OF FILTER

*IF (activities done in past month = voluntary work or cared for someone) OR whether looked after someone in the past week = yes [(WpAct = 4) OR (ErCAA = 1)]*

### **ERVOLCAR @**

Earlier in the interview you told me that you had [^cared for someone in the last month/ cared for someone in the last week].

INTERVIEWER: Press <1> and <Enter> to continue.

END OF FILTER

### **ERRESIN @**

Some people have extra responsibilities because they look after someone who has long-term physical or mental ill health or disability, or problems related to old age.

INTERVIEWER: Press <1> and <Enter> to continue.

Range: 1..1

### **ERRESCK**

May I check, is there anyone (living with ^[you/name]/not living with ^[you/name]) who is sick, disabled or frail whom ^[you look/he/she looks] after or ^[give/gives] special help to, other than in a professional capacity (for example, a sick or disabled (or elderly) relative/husband/wife/child/friend/parent, etc)?

INTERVIEWER: Code no if gives financial help only.

INTERVIEWER: Code yes if respondent gives any help of this kind even if already mentioned earlier in interview.

01 Yes

02 No

*IF give help to others = yes [ERResCk = 1]*

### **ERRESNM**

How many people do you provide this kind of help and support to?

Range: 0..20

**ERAGEC**

How old [^is this person/are these people] who you provide this type of help to?

INTERVIEWER: CODE ALL THAT APPLY TO RECORD THE AGES OF EVERYONE THE RESPONDENT HELPS.

- 01 Aged 0-15 years
- 02 Aged 16-64 years
- 03 Aged 65 and over

IF (ErResNm = 1) THEN

CHECK

(ErAgeC.CARDINAL = 1)

"INTERVIEWER: Can only select 1 age group as answer to number of people helped is 1.

@/Please amend either ErResNm or ErAgeC"

ENDIF

*IF age of person/people provide help to = child (ErAgeC = 1)*

**ERCHLD**

SHOW CARD K4

How many hours did you spend helping the [^person/people aged 0 to 15] in the last week?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY

- 01 No help in the last week
- 02 Less than one hour
- 03 1-4 hours
- 04 5-9 hours
- 05 10-19 hours
- 06 20-34 hours
- 07 35-49 hours
- 08 50-99 hours
- 09 100 hours or more

END OF FILTER

*IF age of person/people provide help to = adult (ErAgeC = 2)*

**ERADLT**

SHOW CARD K4

How many hours did you spend helping the [^person/people aged 16 to 64] in the last week?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY

- 01 No help in the last week
- 02 Less than one hour
- 03 1-4 hours

- 04 5-9 hours
- 05 10-19 hours
- 06 20-34 hours
- 07 35-49 hours
- 08 50-99 hours
- 09 100 hours or more

END OF FILTER

*IF age of person/people provide help to = older (ErAgeC = 3)*

#### **EROLDR**

SHOW CARD K4

How many hours did you spend helping the [^person/people aged 65 or over] in the last week?  
INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY "

- 01 No help in the last week

- 02 Less than one hour
- 03 1-4 hours
- 04 5-9 hours
- 05 10-19 hours
- 06 20-34 hours
- 07 35-49 hours
- 08 50-99 hours
- 09 100 hours or more

END OF FILTER

*IF cares for any of the three age groups 19+ hours per week*

*LOOP ERRESBK ERRESRY ERRESER to ask for each age group cared for separately, based on ERAGEC and hours cared for that group from ERCHLD, ERADLT, EROLDL [(ERAGEC=1 and ERCHLD>05) or (ERAGEC=2 and ERADLT>05) or (ERAGEC=3 and EROLDL>05)] .*

#### **ERRESBK**

If ^[you/name] wanted a break for a few hours (during the time you would usually look after the [^person aged 0-15 \ people aged 0-15\ person aged 16-64\ people aged 16-64\ person aged 65 or over\ people aged aged 65 or over) would someone else have to look after him/her?

- 01 Yes, someone else needed
- 02 No

*IF need another care giver = yes [ERResBK = 1]*

#### **ERRESRY**

Is there anyone whom you could rely on to look after him/her either at home or elsewhere?

- 01 Yes
- 02 No

**ERRESER @**

SHOW CARD K5

In the last year have you made use of any of the following in order to give you a break?  
CODE ALL THAT APPLY.

- 01 A sitting service to allow you to go out for a couple of hours
- 02 A befriending service - where a volunteer takes the person you care for out for the day
- 03 Day-care at a social day centre or hospital
- 04 In-home respite where a care worker comes to the home for a few hours
- 05 Overnight respite where the person you care for stays elsewhere
- 06 Overnight respite where a care worker comes and stays in the home
- 96 None of these

END OF FILTER

*[Multiple responses to ERRESER are recoded in variables: ERRESERS1 ERRESERB1 ERRESERD1 ERRESERI1 ERRESERO1 ERRESERH1 ERRESERN1 ERRESERS2 ERRESERB2 ERRESERD2 ERRESERI2 ERRESERO2 ERRESERH2 ERRESERN2 ERRESERS3 ERRESERB3 ERRESERD3 ERRESERI3 ERRESERO3 ERRESERH3 ERRESERN3]*

**CHECK ER4**

END OF FILTER

*IF respite used = a sitting service, befriending service, day care or daytime home respite  
[(ERRESER =1,2,3 4)] in any of the three loops of ERRESER. ASK ONCE – NO LOOP*

**ERRESOF**

How often do you use any of these services that involves daytime respite...

...READ OUT...

- 01 ...at least once a week,
- 02 once or twice a month,
- 03 6-11 times a year,
- 04 1-5 times a year,
- 05 or less than once a year?

END OF FILTER

*IF respite used = overnight respite elsewhere or overnight respite in own home  
[(ERReSer= 5,6)] in any of the three loops of ERRESER. ASK ONCE – NO LOOP*

**ERRESON**

How often do you use a service that involves overnight respite...

...READ OUT...

- 01 ...at least once a week,
- 02 once or twice a month,
- 03 6-11 times a year,
- 04 1-5 times a year,
- 05 or less than once a year?

END OF FILTER

END OF FILTER

END OF FILTER

IF (activity in the last month = caring or looking after someone in the last week = yes) OR (caring for others = yes) OR (caring for someone in the household = yes)  
[ (WpAct = 4) OR (ERCAA = 1) OR (ERResCk = 1)]

**ERINCAR @**

I would now like to ask you about help that you may have given, as an individual, to anyone including your partner or other people in your household.  
I will now read a couple of statements that are related to your commitment towards other people. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each statement.

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

**ERCARA**

SHOW CARD K3

Considering all the efforts that I have put into caring for someone, I am fully satisfied with what I have achieved so far.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

01 Strongly agree

02 Agree

03 Disagree

04 Strongly disagree

**ERCARB**

SHOW CARD K3

Considering all the efforts that I have put into caring for someone, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

01 Strongly agree

02 Agree

03 Disagree

04 Strongly disagree

END OF FILTER

## **ER Module checks**

### **ER1 ERFVOL**

IF (None IN ErFVol) THEN

CHECK voluntary activities = none of these AND voluntary activities = at least one other action [ErFVol = 96 AND ErFVol = 1..12]

" 'None of these' is an exclusive code for this question."

END CHECK

END OF FILTER

### **ER2 ERIVOL**

IF (None IN ErIVol) THEN

CHECK voluntary personal care = none of these AND voluntary personal care = at least one other action [ErVol = 96 AND ErVol = 1..10]

" 'None of these' is an exclusive code for this question."

END CHECK

END OF FILTER

### **ER3 ERCABNUM**

IF [IF ERCAB = 2]

CHECK number of people helped exceed expected limits for type of person:

[ErCABNum[2] >20]

"Are you sure the respondent looked after more than 20 children? Please amend, or explain | | in a note."

END CHECK

END FILTER

### **CHECK ER3 is repeated for each type of person mentioned at ERCAB**

Grandchildren: check > 20

Parents: check > 2

Parents in law: check > 2

Other relatives: check > 10

Friends or neighbours: check > 10

Other type of relationship: check > 10

### **ER4 ERRESSER**

IF respite services used = none of these [ErResSer = 96]

CHECK: respite services used = none of these AND respite services used = at least one other reason [ErResSer = 96 AND ErMotivA = 1..6]

'None of these' is an exclusive code for this question.

END CHECK

END OF FILTER



# English Longitudinal Study of Ageing

**Wave Six Interview Questionnaire – 2012 to 2013**

## **11 PSYCHOSOCIAL MODULE (PS)**

### **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

#### **Textfills**

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#### **Routing**

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**Version 3.0 MARCH 2014**

## **PSYCHOSOCIAL MODULE (PS)**

### **PSCEDI**

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 Press <1> and <Enter> to continue.

### **PSCEDA**

(Much of the time during the past week), you felt depressed?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDB**

(Much of the time during the past week), you felt that everything you did was an effort?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDC**

(Much of the time during the past week), your sleep was restless?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDD**

(Much of the time during the past week), you were happy?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDE**

(Much of the time during the past week), you felt lonely?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDF**

(Much of the time during the past week), you enjoyed life?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDG**

(Much of the time during the past week), you felt sad?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

### **PSCEDH**

(Much of the time during the past week), you could not get going?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

**PSAGF**

How old do you feel that you are?

INTERVIEWER: Enter age in years.

RANGE : 1..150

# English Longitudinal Study of Ageing

Wave Six Interview Questionnaire – 2012 to 2013

## 12 FINAL QUESTIONS MODULE (FQ)

### IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE

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**Version 3.0 MARCH 2014**

## FINAL QUESTIONS MODULE (FQ)

**FQNR\*** @

[^Now I have some final questions before we reach the end of the interview / Now I have some final questions about [^your / [^name's]] background]

1 Press <1> and <Enter> to continue.

*IF ethnic group at last interview = Response [FqEthn (last int) = RESPONSE] THEN FqEthn= FqEthn (last int)*

*ELSE*

**FQETHN\*** @

SHOW CARD L1

Can I check, to which of the groups on this card do you consider that [^you / [^name]] belong?

INTERVIEWER: Code one only.

1 White

2 Mixed ethnic group

3 Black

4 Black British

5 Asian

6 Asian British

95 Any other group

**[Recoded ethnicity recoded in FQETHNR – White or non-White]**

END OF FILTER

*IF ethnic group = White [FqEthn = 1]*

*IF white cultural background at last interview = RESPONSE*

*[FqWCult (last int) = RESPONSE] THEN FqWCult = FqWCult (last int)*

*ELSE*

**FQWCULT\*** @

What is [^your / [^name's]] cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.

01 ... English?

02 ... Irish?

03 ... Scottish?

04 ... Welsh?

05 ... Other European?

95 ... Any other cultural background? (specify)

**[Code maximum 6 out of 6 possible responses]**

**[Multiple responses to FQWCULT are recoded in variables FQWCULT1 FQWCULT2 FQWCULT3 FQWCULT4 FQWCULT5 FQWCULT9]**

END OF FILTER

END OF FILTER

*IF ethnic group = Mixed Ethnic Group [FqEthn = 2]*

*IF mixed ethnic cultural background at last interview = RESPONSE [FqBcg (last int) = RESPONSE] THEN FqBcg = FqBcg (last int)*

*ELSE*

**FQBCG\*** @

What is [^your / [^name's]] cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.

01 ... White British and Black Caribbean?

02 ... White British and Black African?

03 ... White British and Asian?

95 ... any other cultural background?(specify)

**[Code maximum 4 out of 4 possible responses]**

**[Multiple responses to FQBCG are recoded in variables FQBCG1 to FQBCG3, FQBCG95]**

END OF FILTER

END OF FILTER

*IF ethnic group = Black OR Black British [FqEthn = 3 , 4]*

*IF black cultural background at last interview = RESPONSE [FqBack (last int) = RESPONSE] THEN FqBack = FqBack (last int)*

*ELSE*

**FQBACK\*** @

What is [^your / [^name's]] cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.

01 ... Caribbean?

02 ... African?

95 ... any other cultural background? (specify)

**[Code maximum 3 out of 3 possible responses]**

**[Multiple responses to FQBACK are recoded in variables FQBACK1 FQBACK2 FQBACK95 @]**

END OF FILTER

END OF FILTER

*IF ethnic group = Asian or Asian British [FqEthn = 5, 6]*

*IF Asian cultural background at last interview = RESPONSE [FqCbac (last int) = RESPONSE] THEN FqCbac = FqCbac (last int)*

*ELSE*

**FQCBAC\*** @

What is [^your / [^name's]] cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.  
01 ... African-Indian?  
02 ... Indian?  
03 ... Pakistani?  
04 ... Bangladeshi?  
95 ... any other cultural background? (specify)

**[Code maximum 5 out of 5 possible responses]**

**[Multiple responses to FQCBAC are recoded in variables FQCBAC1 to FQCBAC4, FQCBAC95 @]**

END OF FILTER

END OF FILTER

IF ethnic group = other [FqEthn = 95]

*IF other cultural background at last interview = RESPONSE [FqCulb (last int) = RESPONSE] | THEN FqCulb = FqCulb (last int)*

*ELSE*

**FQCULB\*** @

What is [^your / [^name's]] cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.

01 ... Chinese?  
02 ... Japanese?  
03 ... Philippino?  
04 ... Vietnamese?  
95 ... any other cultural background? (specify)

**[Code maximum 5 out of 5 possible responses]**

**[Multiple responses to FQCULB are recoded in variables FQCULB1 to FQCULB4, FQCULB95 @]**

END OF FILTER

END OF FILTER

*IF (cultural background = other)*

*[FqWCult = 95 OR FqBcg = 95 OR FqBack = 95 OR FqCbac = 95 OR FqCulb = 95]*

*IF other cultural background at last interview = RESPONSE [FqCulb (last int) = RESPONSE]  
THEN FqCulto = FqCulto (last int)*

*ELSE*

**FQCULTO\*** @

How would you describe [^your / [^name's]] cultural background?

String 60

**[Open responses to FQCULTO are coded into variables FQCUL1 to FQCUL2]**

END OF FILTER

END OF FILTER

*IF country of birth given at last interview <> RESPONSE [PFqCbth (last int) <> RESPONSE]*

**FQCBTH\* @**

In which country [^were you / was [^name]] born?

- 01 England
- 02 Scotland
- 03 Wales
- 04 Northern Ireland
- 05 Republic of Ireland
- 06 Elsewhere outside of UK

**[Country of birth recoded in variable FQCBTHR - UK or outside of UK]**

END OF FILTER

*IF (Country of birth = RESPONSE AND Country of birth <> England) [FqCbth = RESPONSE AND FqCbth <> 1]*

**FQCENG\***

In what year did [^you / [^name]] come to live in England?

INTERVIEWER: Write in year.

Range: 1900..2050

**[CHECK FQ1-3]**

END OF FILTER

*IF qualifications at last interview = RESPONSE [FqQual (last int) = RESPONSE]*

**FQMQUA\***

Since the last time that we interviewed [^you / [^name]] [^in date of last interview], [^have you | / has [^name]] obtained any [^BLANK / further] qualifications?

- 01 Yes
- 02 No

**ELSE**

**FQAQUA\***

SHOW CARD L2

Do you have any of the qualifications listed on this card? Please look down the whole list before telling me.

- 01 Yes
- 02 No

END OF FILTER

*IF (whether obtained any new qualifications = Yes) OR (whether has any qualifications listed on card AZ = Yes) [FqMqua = 1 OR FqAqua = 1]*

**FQQUAL\* @**

SHOW CARD L2

Which of the qualifications on this card [^do you have / have you obtained since then]?

Just tell me the number written beside each one.

INTERVIEWER: Record all that apply.

PROBE - 'Any others?'

- 01 Degree/degree level qualification (including higher degree)
- 02 Teaching qualification
- 03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher
- 05 ONC/OND/BEC/TEC/BTEC not higher
- 06 City and Guilds Full Technological Certificate
- 07 City and Guilds Advanced/Final Level
- 08 City and Guilds Craft/Ordinary Level
- 09 A-levels/Higher School Certificate
- 10 AS level
- 11 SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
- 12 O-level passes taken in 1975 or earlier
- 13 O-level passes taken after 1975 GRADES A-C
- 14 O-level passes taken after 1975 GRADES D-E
- 15 GCSE GRADES A-C
- 16 GCSE GRADES D-G
- 17 CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
- 18 CSE GRADES 2-5/SCE Ordinary BANDS D-E
- 19 CSE Ungraded
- 20 SLC Lower
- 21 SUPE Lower or Ordinary
- 22 School Certificate or Matric
- 23 NVQ Level 5
- 24 NVQ Level 4
- 25 NVQ Level 3/Advanced level GNVQ
- 26 NVQ Level 2/Intermediate level GNVQ
- 27 NVQ Level 1/Foundation level GNVQ
- 28 Recognised Trade Apprenticeship completed
- 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce)
- 95 Other qualifications

**[Code maximum 30 out of 30 possible responses]**

*[Multiple responses to FQQUAL are recoded in variables FQQUADEC FQQUATEA  
FQQUANUR FQQUALNC FQQUACGF FQQUALCGA FQQUALCGO FQQUAALE  
FQQUAASL FQQUASLC FQQUAOLP FQQUAOLA FQQUAOLD FQQUAGCA  
FQQUALGCD FQQUACS1 FQQUACS2 FQQUACSU FQQUASLL FQQUALSUP  
FQQUAMAT FQQUANV4 FQQUANV3 FQQUANV2 FQQUANV1 FQQUATRA FQQUACLE |  
FQQUA95]*

#### CHECK FQx

*IF qualification = other [FqQual = 95]*

**FQOQ\*** @

What qualifications are these?

INTERVIEWER: Record all other qualifications in full.

PROBE - 'What else?'

String 60

*[Open responses to FQOQ are coded and merged with the multiple responses to FQQUAL (recoded as above). These merged responses are recoded in variables:  
FQQUMDEG FQQUMTEA FQQUMNUR FQQUMHNC FQQUMONCFQQUMCGF*

**FQQUMCGA FQQUMCGO FQQUMALE FQQUMASL FQQUMSLC FQQUMOLP  
FQQUMOLA FQQUMOLD FQQUMGCA FQQUGCD FQQUMCS1 FQQUMCS2  
FQQUMCSU FQQUMSLL FQQUMSUP FQQUMMAT FQQUMNV5 FQQUMNV4  
FQQUMNV3 FQQUMSNV2 FQQUMNV1 FQQUMMTRA FQQUMCLE FQQUMFOR  
FQQUMNE FQQUMMIL FQQUMDIP FQQUMOAC FQQUMOPR FQQUM85 FQQUM86]**

**FQQUAZM\***

SHOW CARD L2

Which of the qualifications on this card [^do you have / have you obtained since then]?

Just tell me the number written beside each one.

INTERVIEWER: Record all that apply.

PROBE - 'Any others?'

- 01 Degree/degree level qualification (including higher degree)
- 02 Teaching qualification
- 03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher
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- 23 NVQ Level 5
- 24 NVQ Level 4
- 25 NVQ Level 3/Advanced level GNVQ
- 26 NVQ Level 2/Intermediate level GNVQ
- 27 NVQ Level 1/Foundation level GNVQ
- 28 Recognised Trade Apprenticeship completed
- 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce)
- 51 "Other - Qualifications outside the UK",
- 52 Other - Other vocational qualifications not otherwise codeable",
- 53 Other - NVQ level not specified",
- 54 Other - Nursery nurse examination board qualification",
- 55 Other - Qualification obtained during military service",
- 56 Other - Diploma",
- 57 Other - Other academic qualification not otherwise codeable",
- 58 Other - Other professional qualification not otherwise codeable",
- 85 Other answer - not codeable 01 to 29, 51 to 58, or 96",
- 86 Irrelevant response - not codeable 01 to 29, 51 to 58, or 96",
- 95 {Other qualifications}
- 96 None of these"), NODK, NORF, EMPTY

*[Multiple responses to FQQUAZM are recoded in variables: FQQUMDEG FQQUMTEA || FQQUMNUR FQQUMHNC FQQUMONC FQQUMCGF FQQUMGA FQQUMALE  
FQQUMASL FQQUMSLC FQQUMOLP FQQUMOLA FQQUMOLD FQQUMGCA  
FQQUMGCD FQQUMCSI FQQUMCSZ FQQUMCSU FQQUMSLL FQQUMSUP  
FQQUMMAT FQQUMNV5 FQQUMNV4 FQQUMNV3 FQQUMNV2 FQQUMNV1  
FQQUMTRA FQQUMCLE FQQUMOR FQQUMOVO FQQUMNUZ FQQUMNN  
FQQUMMIL FQQUMDIP FQQUMOAC FQQUMOPR FQQUM85 FQQUM86  
[Code maximum 3 out of 40 possible responses]*

END OF FILTER

END OF FILTER

*IF age finished education at last interview <> RESPONSE [FqEnd (last int) <> RESPONSE]*

**FQEND\***

At what age did [^you / [^name]] finish [^your / his / her] continuous full-time education at school or college?

- 01 Not yet finished
- 02 Never went to school
- 03 14 or under
- 04 At 15
- 05 At 16
- 06 At 17
- 07 At 18
- 08 19 or over

END OF FILTER

**FQHELP\***

INTERVIEWER: Did respondent need any help reading the showcards during the interview?

- 01 Yes - due to sight problems
- 02 Yes - due to literacy problems
- 03 Yes - don't know reason
- 04 No

## **FQ Module checks**

### **FQ1 FQCENG**

*IF date of interview = RESPONSE [IntDat = RESPONSE]*

*CHECK: (year of interview >= year of coming to live in England)  
[IntDat.YEAR >= Fqceng]*

INTERVIEWER: This year is in the future (^Response to Fqceng)! Please change!

END CHECK

END OF FILTER

**FQ2 FQCENG**

*IF person's date of birth = RESPONSE [IDoB[PNum] = RESPONSE]*

*CHECK: (person's year of birth >= year of coming to live in England)  
[IDoB[PNum].YEAR >= FqCeng]*

INTERVIEWER: This is before ^Name was born! Please check!

END CHECK

END OF FILTER

(moved from HD)

*IF Eligibility for exit interview= eligible [DhEiEl = Eligible]*

*(DhEiEl is a computed variable therefore not included in archived data)*

**DHEXIT \*@**

So that we can be sure that we understand the end of [Name]'s life, I'd like to come back to talking about [^him/her] towards the end of my visit.

INTERVIEWER: Please note that there will @Inot@I be an end of life interview this wave

Press 1 and <Enter> to continue.

Range: 1..1

**DHEXINT \*@**

Who would be the best person to speak to about [^him/her] at some point in the future?

97 : Not a household member

Range: 1..97

**[Check DH37-DH38]**

END OF FILTER

# English Longitudinal Study of Ageing

## Wave Six Interview Questionnaire – 2012 to 2013

### 13 TIMED WALK MODULE (MM)

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**Version 3.0 MARCH 2014**

## **TIMED WALK (MEASUREMENT) MODULE (MM)**

*IF Respondent's age >= 60 [IAgeOF >= 60]*

### **MFIRST @**

INTERVIEWER: This is the Measurements Questionnaire for... [^Name]

1 Press <1> and <Enter> to continue.

### **MINTDAT @**

INTERVIEWER: Today's date is displayed below. Please amend it if it's not correct.  
[Don't Know and Refusal are not allowed]

**[CHECK MM1]**

### **MMSCHS**

INTERVIEWER: Record respondent status.

- 1 Observed walking without help of another person or using support
- 2 Observed walking with help of another person or using support
- 3 Not observed - in wheelchair
- 4 Not observed - bed bound
- 5 Not observed - uncertain if respondent has impairment

*IF Whether observed respondent walking <> walking without help [MmSchs <> 1]*

### **MMALONE**

I would like to test whether you can walk a very short distance comfortably. (Can I just check,) are you able to walk alone without holding on to another person (using a walking stick or other aid if necessary)?

- 1 Yes
- 2 Yes but aid unavailable
- 3 No

END OF FILTER

*IF (Whether observed respondent walking = walking without help) OR (whether can walk alone without help = Yes) [MmSchs = 1 OR MmAlone = 1]*

### **MMHSS**

[^BLANK / I would now like to test whether you can walk a very short distance comfortably (using a walking stick or other aid if necessary).] First, I would like to ask a few questions to check it is safe to carry out the test. Do you have any problems from recent surgery, injury, or other health conditions that might prevent you from walking?

- 1 No apparent restriction
- 2 Yes, Recent surgery
- 3 Yes, Injury
- 4 Yes, Other health condition

*IF Whether has medical condition that restricts walking = No Restriction [MmHSS = 1]*

### **MMWILL**

Are you willing to do the walking test?

- 1 Yes
- 2 No

*IF whether willing to do walking test = Yes [MmWill = 1]*

**MMSAF**

INTERVIEWER: Do you feel that it is safe to continue with the walking test?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

END OF FILTER

*IF (Whether has medical condition that restricts walking = recent surgery, injury, other condition, DK, RF) OR (whether can walk alone without help = aid unavailable, no, DK, RF) OR (whether interviewer feels it is safe to do walking test = No, don't know, RF) [MmHSS = 2, 3, 4, DK, RF OR MmAlone = 2, 3, DK, RF OR MmSaf = no, DK, RF }*

**MMSTOP**

INTERVIEWER: Stop test, for example saying: 'It would be safest to skip this test and move on to the next set of questions'.

- 1 Press <1> and <Enter> to continue.

END OF FILTER

*IF (Whether willing to do the walking test = Yes) AND (Whether interviewer feels it is safe to do the walking test = Yes) [MmWill = 1 AND MmSaf = 1]*

**MMAVSP**

INTERVIEWER: Check availability of suitable space.

- 1 Suitable space available
- 2 No suitable space

*IF whether suitable space available = Suitable space [MmAvsp = 1]*

**MMWALA**

This is our walking course. I want you to walk to the other end of the course at your usual walking pace, just as if you were walking down the street to go to the shops. Walk all the way past the other end of the tape before you stop.

INTERVIEWER: Demonstrate the walk for the respondent.  
(I will walk with you.) Do you feel this would be safe?

- 1 Yes
- 2 No

*IF whether feels walking test would be safe = Yes [MmWala = 1]*

**MMSTRT**

When I want you to start, I will say: 'Ready, begin!'

INTERVIEWER: Ask the respondent to stand with both feet together at the start of the walking course. When the respondent is properly positioned at the start of the walking course, say: 'Ready, begin!' Press the start / stop button to start the stopwatch as the respondent's foot hits the floor across the starting line. If possible walk behind and to the

side of the respondent. Stop timing when the respondent's foot hits the floor after the end of the walking course.

Enter 1 to continue.

Range: 1..1

#### **MMTRYA**

INTERVIEWER: Record results of first trial.

Enter time at next question.

- 1 Completed successfully
- 2 Attempted but unable to complete
- 3 Stopped by the interviewer because of safety reasons
- 4 Respondent refused

*IF result of first walking test = Completed successfully [MmTrya = 1]*

#### **MMWLKA**

INTERVIEWER: Record time in seconds to two decimal places.

#### **MMWALB @**

Now I want you to repeat the walk. Remember to walk at your usual pace, and go all the way past the other end of the course.

1 Press <1> and <Enter> to continue.

#### **[CHECK MM2-MM4]**

#### **MMTRYB**

INTERVIEWER :Record result of second trial.

Enter time at next question.

- 1 Completed successfully
- 2 Attempted but unable to complete
- 3 Stopped by the interviewer because of safety reasons
- 4 Respondent refused

*IF result of second walking test = Completed successfully [MmTryb = 1]*

#### **MMWLKB**

INTERVIEWER: Record time in seconds to two decimal places.

#### **[CHECK MM5-MM9]**

END OF FILTER

*IF (result of first walking test = Completed successfully) OR (result of second walking test = Completed successfully) [ MmTrya = 1 OR MmTryb = 1 ]*

#### **MMPAIN**

INTERVIEWER: Code if respondent has commented on pain,  
OTHERWISE ASK: 'Did you have pain while you were performing the walking test?'  
1 Yes  
2 No

**MMRECR**

INTERVIEWER: Record type of floor surface.  
1 Linoleum / tile / wood  
2 Low-pile carpet  
3 Thick-pile carpet  
4 Concrete  
5 Others

*IF Type of floor surface = Other [MmRecR = 5]*

**MMRECRO @**

INTERVIEWER: Enter other type of floor surface.  
String 20

**[Open responses to MMRECRO were coded and then incorporated into MMRECR.  
MMRECRC identifies that an open response was given at MMRECRO and  
incorporated into MMRECR]**

END OF FILTER

**MMAID**

INTERVIEWER: Record type of aid used.  
1 None  
2 Walking stick or cane  
3 Elbow crutches  
4 Walking frame  
5 Others

*IF Type of walking aid used = Other [MmAid = 5]*

**MMAIDO @**

INTERVIEWER: Enter other type of aid used.  
String 20

**[Open responses to MMAIDO were coded and then incorporated into MMAID.  
MMAIDC identifies that an open response was given at MMAIDO and incorporated  
into MMAID.]**

END OF FILTER

END OF FILTER

*IF NOT ((result of first walking test = completed successfully) AND (result of second walking  
test = completed successfully)) [NOT (MmTrya = 1 AND MmTryb = 1)]*

**MMCOM@**

INTERVIEWER: Provide details about why the walking test was not completed successfully,  
i.e. why it was stopped for safety reasons, refused, or not completed.  
Open

|| [Open responses to MMCOM were coded into variables: mmcomun mmcomsp || mmcomrf  
mmcomni mmcompa mmcom85 mmcom86]

END OF FILTER

**MMX@**

INTERVIEWER: The Measurements Interview is finished.  
Please enter 1 here to make the program store the current time and date.  
Range: 1..1

**MTHANK @**

INTERVIEWER: The Measurements Interview is finished.  
- to return to the Individual Qre, press <Ctrl> <Enter>  
- to start another Individual Qre, press <Ctrl> <Enter>  
- to update the Admin details, press <Ctrl> <Enter>  
1 Press <1> and <Enter> to continue.

END OF FILTER

## **MM Module Checks**

**MM1 MINTDAT**

*IF (Whether post-interview editing question <> Yes) AND (date at beginning of MM section =  
RESPONSE) [EditQre <> 1 AND MIntDat = RESPONSE]*

CHECK: (MIntDat.YEAR = QInit.IntDat.YEAR) AND (MIntDat <= SYSDATE)  
[MIntDat.YEAR = QInit.IntDat.YEAR AND MIntDat <= SYSDATE ]  
This can't be right. Please check the year.

END CHECK  
END OF FILTER

**MM2 MMWALB**

**MM3 MMWALB**

**MM4 MMWALB**

*IF Time taken for first walking test = RESPONSE [MMWlkA = RESPONSE]*

CHECK: ( time taken for first walking test >=1) AND (time taken for first walking test <=50)  
[MMWlkA >=1 AND MMWlkA <= 50]

INTERVIEWER: This time is not possible.  
Please change!

END CHECK

CHECK: time taken for first walking test <= 15 [MMWlkA <= 15 ]

INTERVIEWER: This seems rather high.  
Please check!

END CHECK

CHECK: time taken for first walking test >= 2 [MMWlkA >= 2 ]

INTERVIEWER: Are you sure? This seems rather low  
Please check!

END CHECK

END OF FILTER

**MM5 MMWLKB**

**MM6 MMWLKB**

**MM7 MMWLKB**

**MM8 MMWLKB**

**MM9 MMWLKB**

*IF (Whether post-interview editing question = Yes) AND (MMWlkB = RESPONSE)*

*[Edit Qre = 1 AND MMWlkB = RESPONSE]*

CHECK: (time taken for second walking test = 1) AND (time taken for second walking test  
<= 10) [MMWlkB = 1 AND MMWlkB <= 10 ]

EDIT : MMWlkB is ^MMwlkB  
Please check!

END CHECK

END OF FILTER

*IF Time take for second walking test = RESPONSE [MMWlkB = RESPONSE]*

CHECK: (time taken for second walking test>= 1) AND (time taken for second walking  
test<= 50) [MMWlkB >=1 AND MMWlkB <= 50 ]

INTERVIEWER: This time is not possible.  
Please change!

END CHECK

CHECK: time taken for second walking test <= 15 [MMWlkB <= 15 ]

INTERVIEWER: This seems rather high.  
Please check!

END CHECK

CHECK: time taken for second walking test >= 2 [MMWlkB >= 2 ]

INTERVIEWER: Are you sure? This seems rather low.  
Please check!

END CHECK

*IF time taken for first walking test = RESPONSE [MMWlkA = RESPONSE]*

CHECK: (time taken for first walking test - time taken for second walking test) <= 5

[MMWIkA - MMWIkB <= 5 ]

INTERVIEWER: The two times are very different from each other.  
Please check the numbers you have entered!

END CHECK

END OF FILTER

END OF FILTER

# English Longitudinal Study of Ageing

**Wave Six Interview Questionnaire – 2012 to 2013**

## **14 PAPER SELF-COMPLETION QUESTIONNAIRE (SC)**

### **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

#### **Textfills**

<sup>^</sup> - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

#### **Routing**

<> - This annotation is used to indicate ‘not equals to’.

An asterisk(\*) after a question name indicates that it is asked of proxy and non-proxy respondents; two asterisks indicate a proxy only question, and no asterisks indicates non-proxy only (that the question is only asked of the named respondent).

#### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or “press 1 and continue” variables) – see User Guide for more information.

#### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks are numbered within each module of the questionnaire (e.g. “[CHECK ER2]”) and the details of the checks are given at the end of document.

#### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 3.0 MARCH 2014**

## **Core Paper Self-completion Questionnaire (SC) (PDF version also archived)**

### **SCPTR @**

Which of these statements apply to you?

TICK ALL THAT APPLY

- 1 I read a daily newspaper
- 2 I have a hobby or pastime
- 3 I have taken a holiday in the UK in the last 12 months
- 4 I have taken a holiday abroad in the last 12 months
- 5 I have gone on a daytrip or outing in the last 12 months
- 6 I own a mobile phone

96 None of these statements apply to me

**[Multiple responses to SCPTR are recoded in variables: SCPTR01 to SCPTR07]**

**[NB this is similar to SCPTP from previous waves but with the category about internet use removed so mobile phone is now SCPRT06]**

### **SCORG @**

Are you a member of any of these organisations, clubs or societies?

TICK ALL THAT APPLY

- 1 Political party, trade union or environmental groups
- 2 Tenants groups, resident groups, Neighbourhood watch
- 3 Church or other religious groups
- 4 Charitable associations
- 5 Education, arts or music groups or evening classes
- 6 Social Clubs
- 7 Sports clubs, gyms, exercise classes

95 Any other organisations, clubs or societies

96 No, I am not a member of any organisations, clubs or societies

**[Multiple responses to SCORG are recoded in variables SCORG01 to SCORG09]**

*IF Whether been a member of any of the organisations, clubs or societies <> No [SCorg <> 96]*

### **SCORGN**

Thinking about all the organisations, clubs or societies that you are a member of, how many committee meetings if any, do you attend in a year?

Range: 0..52

*END OF FILTER*

### **SCEDCP**

How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?

Bank or cash point

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDPO**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Post Office

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDCS**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Corner Shop

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDSU**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Medium or large supermarket

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDSC**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Shopping centre

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDGP**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

General Practitioner (GP)

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDCH**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Chiropodist

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDDE**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Dentist

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDOP**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Optician

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCEDHO**

(How easy or difficult would it be for you to get to each of the following places, using your usual form of transport?)

Hospital

- 1 Very easy
- 2 Quite easy
- 3 Quite difficult
- 4 Very difficult
- 5 Unable to go
- 6 Do not wish to go

### **SCACTA**

Now some questions about your social activities. How often, if at all, do you do any of the following activities?

Go to the cinema

- 1 Twice a month or more
- 2 About once a month
- 3 Every few months
- 4 About once or twice a year
- 5 Less than once a year
- 6 Never

### **SCACTB**

(How often, if at all, do you do any of the following activities?)

- Eat out of the house
- 1 Twice a month or more
  - 2 About once a month
  - 3 Every few months
  - 4 About once or twice a year
  - 5 Less than once a year
  - 6 Never

#### **SCACTC**

(How often, if at all, do you do any of the following activities?)

- Go to an art gallery or museum
- 1 Twice a month or more
  - 2 About once a month
  - 3 Every few months
  - 4 About once or twice a year
  - 5 Less than once a year
  - 6 Never

#### **SCACTD**

(How often, if at all, do you do any of the following activities?)

- Go to the theatre, a concert or the opera
- 1 Twice a month or more
  - 2 About once a month
  - 3 Every few months
  - 4 About once or twice a year
  - 5 Less than once a year
  - 6 Never

#### **SCMOREA**

Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?

- Go to the cinema
- 1 Yes
  - 2 No

#### **SCMOREB**

(Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?)

- Eat out of the house
- 1 Yes
  - 2 No

#### **SCMOREC**

(Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?)

- Go to an art gallery or museum
- 1 Yes
  - 2 No

#### **SCMORED**

(Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?)

- Go to the theatre, a concert or the opera
- 1 Yes

2 No

### **SCINT**

We would now like to ask you some questions about your use of the Internet and email.  
On average, how often do you use the Internet or email?

Tick one box

- 1 Every day, or almost every day
- 2 At least once a week (but not every day)
- 3 At least once a month (but not every week)
- 4 At least once every 3 months
- 5 Less than every 3 months
- 6 Never

*[If Uses internet at least every three months [SCINT<5]]*

### **SCINP**

In which of the following places have you used the Internet or email in the last 3 months?

Tick all that apply

- 1 At home
- 2 At place of work (other than home)
- 3 At place of education
- 4 At another person's home
- 5 On the move
- 6 Other place (library, internet cafe)

*[Multiple responses to SCINP are recoded in variables SCINP1 to SCINP6]*

### **SCIND**

**On which of the following devices do you access the Internet?**

Tick all that apply

- 1 Desktop computer
- 2 Laptop computer
- 3 Tablet computer (e.g. iPad, Samsung Galaxy Tab)
- 4 Smartphone (e.g. iPhone, Blackberry)
- 5 TV (e.g. games console or set top box)
- 6 Other mobile devices
- 7 Don't know
- 8 Do not access internet

*[Multiple responses to SCIND are recoded in variables SCIND1 to SCIND7]*

### **SCINA**

**For or which of the following activities did you use the Internet in the last 3 months?**

Tick all that apply

- 1 Sending/receiving e-mails
- 2 Telephoning over the Internet/video calls (via webcam) over the Internet
- 3 Searching for information for learning, research, fact finding
- 4 Finances (banking, paying bills)
- 5 Shopping/ buying goods or services
- 6 Selling goods or services over the internet, e.g. via auctions
- 7 Use social networking sites (Facebook, Twitter, Myspace)
- 8 Creating, uploading or sharing content (YouTube, blogging or Flickr)
- 9 News/ newspaper/ blog websites
- 10 Streaming/ downloading live or on demand TV/radio (BBC iplayer, 4oD, ITV player, Demand 5), music (iTunes, Spotify), or ebooks
- 11 Games
- 12 Looking for a job or sending a job application

| 13 Other  
| 14 None of the above  
| END OF FILTER

**[Multiple responses to SCINA are recoded in variables SCINA01 to SCINA14]**

### **SCTVWKD**

The next two questions are about watching television.

How many hours of television do you watch on an ordinary day or evening during the week, that is, Monday to Friday?

Range: 0..24

### **SCTVWKE**

And thinking now about an ordinary weekend. How many hours of television do you normally watch in total over the weekend, that is, Saturday and Sunday?

Range: 0..48

### **SCLIFEA**

Please say how much you agree or disagree with the following statements. In most ways my life is close to ideal

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

### **SCLIFEB**

(Please say how much you agree or disagree with the following statements.)

The conditions of my life are excellent

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

### **SCLIFEC**

(Please say how much you agree or disagree with the following statements.)

I am satisfied with my life

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

**SCLIFED**

(Please say how much you agree or disagree with the following statements.)

So far I have got the important things I want in life

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

**SCLIFEEL**

(Please say how much you agree or disagree with the following statements.)

If I could live life again, I would change almost nothing

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

**SCDCA**

Here are some questions about how you feel about your life in general. Please say how much you agree or disagree with the following statements.

At home, I feel I have control over what happens in most situations

- 1 Strongly agree
- 2 Moderately agree
- 3 Slightly agree
- 4 Slightly disagree
- 5 Moderately disagree
- 6 Strongly disagree

**SCDCC**

(Please say how much you agree or disagree with the following statements.)

I feel what happens in life is often determined by factors beyond my control

- 1 Strongly agree
- 2 Moderately agree
- 3 Slightly agree
- 4 Slightly disagree
- 5 Moderately disagree
- 6 Strongly disagree

**SCDCD**

(Please say how much you agree or disagree with the following statements.)

In general, I have different demands that I think are hard to combine

- 1 Strongly agree
- 2 Moderately agree
- 3 Slightly agree
- 4 Slightly disagree
- 5 Moderately disagree
- 6 Strongly disagree

**SCDCE**

(Please say how much you agree or disagree with the following statements.)

In general, I have enough time to do everything

- 1 Strongly agree
- 2 Moderately agree
- 3 Slightly agree
- 4 Slightly disagree
- 5 Moderately disagree
- 6 Strongly disagree

### **SCDCG**

(Please say how much you agree or disagree with the following statements.)

Considering the things I have to do at home, I have to work very fast

- 1 Strongly agree
- 2 Moderately agree
- 3 Slightly agree
- 4 Slightly disagree
- 5 Moderately disagree
- 6 Strongly disagree

### **SCFEELA**

The next questions are about how you feel about different aspects of your life. For each one, please say how often you feel that way.

How often do you feel you lack companionship?

- 1 Hardly ever or never
- 2 Some of the time
- 3 Often

### **SCFEELB**

How often do you feel left out?

- 1 Hardly ever or never
- 2 Some of the time
- 3 Often

### **SCFEELC**

How often do you feel isolated from others?

- 1 Hardly ever or never
- 2 Some of the time
- 3 Often

### **SCFEELD**

How often do you feel in tune with the people around you?

- 1 Hardly ever or never
- 2 Some of the time
- 3 Often

### **SCFEELE**

How often do you feel lonely?

- 1 Hardly ever or never
- 2 Some of the time
- 3 Often

### **SCQOLA**

My age prevents me from doing the things I would like to

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLB**

I feel that what happens to me is out of my control

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLC**

I feel free to plan for the future

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLD**

I feel left out of things

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLE**

I can do the things that I want to do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLF**

Family responsibilities prevent me from doing what I want to do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLG**

I feel that I can please myself what I do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

#### **SCQOLH**

My health stops me from doing things I want to do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLI**

Shortage of money stops me from doing things I want to do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLJ**

I look forward to each day

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLK**

I feel that my life has meaning

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLL**

I enjoy the things that I do

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLM**

I enjoy being in the company of others

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLN**

On balance, I look back on my life with a sense of happiness

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLO**

I feel full of energy these days

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLP**

I choose to do things that I have never done before

- 1 Often
- 2 Sometimes

- 3 Not often
- 4 Never

**SCQOLQ**

I feel satisfied with the way my life has turned out

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLR**

I feel that life is full of opportunities

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCQOLS**

I feel that the future looks good for me

- 1 Often
- 2 Sometimes
- 3 Not often
- 4 Never

**SCFEDE**

During the past 30 days, to what degree did you feel...

Determined?

- 1 Very much
- 2 Quite a bit
- 3 Moderately
- 4 A little
- 5 Not at all

**SCFEEN**

(During the past 30 days, to what degree did you feel...) Enthusiastic?

- 1 Very much
- 2 Quite a bit
- 3 Moderately
- 4 A little
- 5 Not at all

**SCFEAC**

(During the past 30 days, to what degree did you feel...) Active?

- 1 Very much
- 2 Quite a bit
- 3 Moderately
- 4 A little
- 5 Not at all

**SCFEPR**

(During the past 30 days, to what degree did you feel...)

Proud?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEINT**

(During the past 30 days, to what degree did you feel...)

Interested?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEHA**

(During the past 30 days, to what degree did you feel...)

Happy?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEAT**

(During the past 30 days, to what degree did you feel...)

Attentive?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFECO**

(During the past 30 days, to what degree did you feel...)

Content?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEINS**

(During the past 30 days, to what degree did you feel...)

Inspired?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEHO**

(During the past 30 days, to what degree did you feel...)

Hopeful?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEAL**

(During the past 30 days, to what degree did you feel...)

Alert?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFECA**

(During the past 30 days, to what degree did you feel...)

Calm?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCFEEX**

(During the past 30 days, to what degree did you feel...)

Excited?  
1 Very much  
2 Quite a bit  
3 Moderately  
4 A little  
5 Not at all

**SCDEOU**

(During the past 30 days, to what degree did you feel...)

Please indicate how well each of the following describes you

Outgoing  
1 A lot  
2 Some  
3 A little  
4 Not at all

**SCDEHE**

(Please indicate how well each of the following describes you)

Helpful  
1 A lot  
2 Some  
3 A little  
4 Not at all

**SCDEMO**

(Please indicate how well each of the following describes you)

Moody

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCDEOR**

(Please indicate how well each of the following describes you)

- Organised
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDEFR**

(Please indicate how well each of the following describes you)

- Friendly
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDEWA**

(Please indicate how well each of the following describes you)

- Warm
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDEWO**

(Please indicate how well each of the following describes you)

- Worrying
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDERE**

(Please indicate how well each of the following describes you)

- Responsible
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDELI**

(Please indicate how well each of the following describes you)

- Lively
- 1 A lot
  - 2 Some
  - 3 A little
  - 4 Not at all

**SCDECA**

(Please indicate how well each of the following describes you)

Caring

1 A lot

2 Some

3 A little

4 Not at all

### **SCDENE**

(Please indicate how well each of the following describes you)

Nervous

1 A lot

2 Some

3 A little

4 Not at all

### **SCDECR**

(Please indicate how well each of the following describes you)

Creative

1 A lot

2 Some

3 A little

4 Not at all

### **SCDEHA**

(Please indicate how well each of the following describes you)

Hardworking

1 A lot

2 Some

3 A little

4 Not at all

### **SCDEIM**

(Please indicate how well each of the following describes you)

Imaginative

1 A lot

2 Some

3 A little

4 Not at all

### **SCDESOF**

(Please indicate how well each of the following describes you)

Softhearted

1 A lot

2 Some

3 A little

4 Not at all

### **SCDECAL**

(Please indicate how well each of the following describes you)

Calm

1 A lot

2 Some

3 A little

4 Not at all

**SCDEIN**

(Please indicate how well each of the following describes you)

Intelligent

1 A lot

2 Some

3 A little

4 Not at all

**SCDECU**

(Please indicate how well each of the following describes you)

Curious

1 A lot

2 Some

3 A little

4 Not at all

**SCDEAC**

(Please indicate how well each of the following describes you)

Active

1 A lot

2 Some

3 A little

4 Not at all

**SCDECAR**

(Please indicate how well each of the following describes you)

Careless

1 A lot

2 Some

3 A little

4 Not at all

**SCDEBR**

(Please indicate how well each of the following describes you)

Broad-minded

1 A lot

2 Some

3 A little

4 Not at all

**SCDESY**

(Please indicate how well each of the following describes you)

Sympathetic

1 A lot

2 Some

3 A little

4 Not at all

**SCDETA**

(Please indicate how well each of the following describes you)

Talkative

1 A lot

- 2 Some
- 3 A little
- 4 Not at all

**SCDESO**

(Please indicate how well each of the following describes you)

Sophisticated

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCDEAD**

(Please indicate how well each of the following describes you)

Adventurous

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCDETH**

(Please indicate how well each of the following describes you)

Thorough

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCPTR**

Do you have a husband, wife or partner with whom you live?

- 1 Yes
- 2 No

*IF Lives with husband, wife or partner = Yes [SCptr = 1]*

We would now like to ask you some questions about your spouse or partner. Please tick the box which best shows how you feel about each statement.

**SCPTRA**

How much do they really understand the way you feel about things?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCPTRB**

How much can you rely on them if you have a serious problem?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCPTRC**

How much can you open up to them if you need to talk about your worries?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

### **SCPTRD**

How much do they criticise you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

### **SCPTRE**

How much do they let you down when you are counting on them?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

### **SCPTRF**

How much do they get on your nerves?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

### **SCPTRX**

How often do they demands on you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

### **SCPTRG**

How close is your relationship with your spouse or partner?

- 1 Very close
- 2 Quite close
- 3 Not very close
- 4 Not at all close

*END OF FILTER*

### **SCCHD**

Do you have any children?

- 1 Yes
- 2 No

*IF Whether has any children = Yes [SCchd = 1]*

We would like to ask you some questions about your children. Please tick the box which best shows how you feel about each statement.

### **SCCHDA**

How much do they really understand the way you feel about things?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDB**

How much can you rely on them if you have a serious problem?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDC**

How much can you open up to them if you need to talk about your worries?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDD**

How much do they criticise you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDE**

How much do they let you down when you are counting on them?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDF**

How much do they get on your nerves?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDX**

How often do they make demands on you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCCHDG**

On average, how often do you do each of the following with any of your children, not counting any who live with you?

Meet up (include both arranged and chance meetings)?

- 1 Three or more times a week
- 2 Once or twice a week

- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

### **SCCHDH**

(On average, how often do you do each of the following with any of your children, not counting any who live with you?)

Speak on the phone?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

### **SCCHDI**

(On average, how often do you do each of the following with any of your children, not counting any who live with you?)

Write or email?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

### **SCCHDT**

(On average, how often do you do each of the following with any of your children, not counting any who live with you?)

Send or receive text messages?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

### **SCCHDM**

How many of your children would you say you have a close relationship with?

Range: 0..10

*END OF FILTER*

### **SCFAM**

Do you have any other immediate family, for example, any brothers or sisters, parents, cousins or grandchildren?

- 1 Yes
- 2 No

*IF Whether has any other immediate family = Yes [SCfam = 1]*

We would now like to ask you some questions about these family members. Please tick the box which best shows how you feel about each statement.

**SCFAMA**

How much do they really understand the way you feel about things?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMB**

How much can you rely on them if you have a serious problem?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMC**

How much can you open up to them if you need to talk about your worries?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMD**

How much do they criticise you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAME**

How much do they let you down when you are counting on them?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMF**

How much do they get on your nerves?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMX**

How often do they make too many demands on you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFAMG**

On average, how often do you do each of the following with any of these family

members, not counting any who live with you?  
Meet up (include both arranged and chance meetings)?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

#### **SCFAMH**

(On average, how often do you do each of the following with any of these family members, not counting any who live with you?)

Speak on the phone?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

#### **SCFAMI**

(On average, how often do you do each of the following with any of these family members, not counting any who live with you?)

Write or email?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

#### **SCFAMT**

(On average, how often do you do each of the following with any of these family members, not counting any who live with you?)

Send or receive text messages?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

#### **SCFAMM**

How many of these family members would you say you have a close relationship with?

Range: 0..20

*END OF FILTER*

#### **SCFRD**

Do you have any friends?

- 1 Yes
- 2 No

*IF Whether has any friends = Yes [SCfrd = 1]*

We would now like to ask you some questions about your friends. Please tick the box which best shows how you feel about each statement.

**SCFRDA**

How much do they really understand the way you feel about things?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDB**

How much can you rely on them if you have a serious problem?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDC**

How much can you open up to them if you need to talk about your worries?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDD**

How much do they criticise you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDE**

How much do they let you down when you are counting on them?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDF**

How much do they get on your nerves?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDX**

How much do they make too many demands on you?

- 1 A lot
- 2 Some
- 3 A little
- 4 Not at all

**SCFRDG**

(On average, how often do you do each of the following with any of these friends, not counting any who live with you?)

Meet up (include both arranged and chance meetings)?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

**SCFRDH**

(On average, how often do you do each of the following with any of these friends, not counting any who live with you?)

Speak on the phone?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

**SCFRDI**

(On average, how often do you do each of the following with any of these friends, not counting any who live with you?)

Write or email?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

**SCFRDT**

(On average, how often do you do each of the following with any of these friends, not counting any who live with you?)

Send or receive text messages?

- 1 Three or more times a week
- 2 Once or twice a week
- 3 Once or twice a month
- 4 Every few months
- 5 Once or twice a year
- 6 Less than once a year or never

**SCFRDM**

How many of your friends would you say you have a close relationship with?

Range: 0..30

*END OF FILTER*

**SCDTDRE**

In your day-to-day life, how often have any of the following things happened to you?

You are treated with less courtesy or respect than other people

- 1 Almost every day
- 2 At least once a week
- 3 A few times a month
- 4 A few times a year
- 5 Less than once a year
- 6 Never

**SCDTDST**

(In your day-to-day life, how often have any of the following things happened to you?)

You receive poorer service than other people at restaurants or stores

- 1 Almost every day
- 2 At least once a week
- 3 A few times a month
- 4 A few times a year
- 5 Less than once a year
- 6 Never

**SCDTDCL**

(In your day-to-day life, how often have any of the following things happened to you?)

People act as if they think you are not clever

- 1 Almost every day
- 2 At least once a week
- 3 A few times a month
- 4 A few times a year
- 5 Less than once a year
- 6 Never

**SCTDHAA**

(In your day-to-day life, how often have any of the following things happened to you?)

You are threatened or harassed

- 1 Almost every day
- 2 At least once a week
- 3 A few times a month
- 4 A few times a year
- 5 Less than once a year
- 6 Never

**SCDTDDR**

(In your day-to-day life, how often have any of the following things happened to you?)

You receive poorer service or treatment than other people from doctors or hospitals

- 1 Almost every day
- 2 At least once a week
- 3 A few times a month
- 4 A few times a year
- 5 Less than once a year

6 Never

**SCDTD @**

If any of the above things mentioned in the previous question have happened to you, what do you think were the reasons WHY these experiences happened to you?

*Tick all that apply*

- 1 Your gender
- 2 Your race
- 3 Your age
- 4 Your weight
- 5 A physical disability
- 6 An aspect of your physical appearance
- 7 Your sexual orientation
- 8 Your financial status
- 9 Other, please specify

**[multiple response to SCDTD are recoded in variables: SCDTD01 to SCDTD09]**

**SCREWH**

What is your religion?

- 1 No religion
- 2 Christian (including Church of England, Catholic, other)
- 3 Protestant and all other Christian denominations)
- 4 Buddhist
- 5 Hindu
- 6 Jewish
- 7 Muslim
- 8 Sikh
- 9 Any other religion, write in

**SCRELOF**

About how often have you attended religious services during the past year?

- 1 More than once a week
- 2 Once a week
- 3 Two or three times a month
- 4 One or more times a year
- 5 Not at all
- 6 Don't know

**SCRELFA**

These questions are about your religious or spiritual beliefs.

Please tick the box which best shows how you feel about each statement.

Religious faith is extremely important to me

- 1 Strongly disagree
- 2 Disagree
- 3 Agree
- 4 Strongly agree

**SCRELPR**

(Please tick the box which best shows how you feel about each statement.)

I pray or meditate daily

- 1 Strongly disagree
- 2 Disagree
- 3 Agree
- 4 Strongly agree

### **SCRELME**

(Please tick the box which best shows how you feel about each statement.)

I look to my religion to provide meaning and purpose in my life

- 1 Strongly disagree
- 2 Disagree
- 3 Agree
- 4 Strongly agree

### **SCRELAC**

(Please tick the box which best shows how you feel about each statement.)

I consider myself active in organised religion (going to church, temple, mosque, etc.)

- 1 Strongly disagree
- 2 Disagree
- 3 Agree
- 4 Strongly agree

### **SCRELIM**

How important is religion in your daily life?

- Very important
- Somewhat important
- Not very important
- Not at all important

### **SCEMPL**

The next questions are about paid employment.

Were you in paid employment last month?

- 1 Yes
- 2 No

*IF Whether in paid employment last month = Yes [SCempl = 1]*

Here are some statements people might use to describe their work. We would like to know how strongly you think that these apply to the paid employment you did in the last month.

### **SCWORKA**

All things considered I am satisfied with my job

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

### **SCWORKB**

My job is physically demanding

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKC**

I receive the recognition I deserve in my work

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**Scworkd**

My salary is adequate

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKE**

My job promotion prospects are poor

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKF**

My job security is poor

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKG**

I am under constant pressure due to a heavy workload

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKH**

I have very little freedom to decide how I do my work

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKI**

I have the opportunity to develop new skills

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**SCWORKJ**

I receive adequate support in difficult situations

- 1 Strongly agree
- 2 Agree

- 3 Disagree
- 4 Strongly disagree

### **SCWORKK**

At work I feel I have control over what happens in most situations

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

### **SCWORKL**

Considering the things I have to do at work I have to work very fast

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

### **SCRTAGE**

At what age would you like to retire?

Range: 0 to 201

### **SCRAGB**

I have already retired

Range: 0..1

*END OF FILTER*

### **SCLDDR**

Think of this ladder as representing where people stand in our society. At the top of the ladder are the people who are the best off – those who have the most money, most education and best jobs. At the bottom are the people who are the worst off – who have the least money, least education and the worst jobs or no jobs. The higher up you are on this ladder, the closer you are to people at the very top and the lower you are, the closer you are to people at the very bottom. Please mark a cross on the rung on the ladder where you would place yourself.

Range: 0..10

### **SCDWK**

Now, please pause briefly to think about yesterday, from the morning until \_\_\_\_\_ the end of the day.  
Think about where you were, what you were doing, who \_\_\_\_\_ you were with, and how you felt.

What day of the week was it yesterday?

Tick one box

- 1 Monday
- 2 Tuesday
- 3 Wednesday
- 4 Thursday
- 5 Friday
- 6 Saturday
- 7 Sunday

**SCWUTIME**

What time did you wake up yesterday?

For example, if you woke up at 4:00AM, please write 04 in the hour boxes, 00 in the minutes boxes and AM in the last boxes.

Hours, Minutes, AM/PM: Derived into 24 hour clock

**SCSYTIME**

What time did you go to sleep at the end of the day yesterday?

For example, if you went to sleep at 11:30PM, please write 11 in the hour boxes, 30 in the minutes boxes and PM in the last boxes

Hours, Minutes, AM/PM: Derived into 24 hour clock

**SCYPA**

Yesterday, did you feel any pain?

- 1 None
- 2 A little
- 3 Some
- 4 Quite a bit
- 5 A lot

**SCYWR**

Did you feel well-rested yesterday morning (that is you slept well the night before)?

Tick one box

- 1 Yes
- 2 No

**SCYND**

Was yesterday a normal day for you or did something unusual happen?

Tick one box

- 1 Yes – just a normal day
- 2 No, my day included unusual bad (stressful) things
- 3 No, my day included unusual good things

**SCTVY**

Please think about the things you did yesterday. How did you spend your time and how did you feel?

Yesterday did you watch TV?

Tick one box

- 1 Yes
- 2 No

*If watched TV [ SCTVY=1]*

**SCTVTH**

How much time did you spend watching TV yesterday?

For example, if you spent one and a half hours, write 1 in the hours box and 30 in the minutes boxes.

Hours

**SCTVTM**

How much time did you spend watching TV yesterday?

For example, if you spent one and a half hours, write 1 in the hours box and 30 in the minutes boxes.

Minutes

**SCTVH**

How did you feel when you were watching TV yesterday? Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

**SCTVI**

How did you feel when you were watching TV yesterday? Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

**SCTVF**

How did you feel when you were watching TV yesterday? Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt frustrated

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

**SCTVS**

How did you feel when you were watching TV yesterday? Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

*END OF FILTER*

**SCWVY**

Yesterday did you work or volunteer?

Tick one box

1 Yes

2 No

*If worked or volunteered [ SCWVY=1]*

**SCWVTH**

How much time did you spend working or volunteering yesterday?

For example, if you spent nine and a half hours, write 9 in the hours box and 20 in the | minutes box.

Hours

**SCWVTM**

How much time did you spend working or volunteering yesterday?

For example, if you spent nine and a half hours, write 9 in the hours box and 20 in the minutes box.  
Minutes

**SCWVFA**

How did you feel when you were working or volunteering yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCWVFB**

How did you feel when you were working or volunteering yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt Interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCWVFC**

How did you feel when you were working or volunteering yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt Frustrated

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCWVFD**

How did you feel when you were working or volunteering yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

*END OF FILTER*

**SCAWE**

Yesterday did you go for a walk or exercise?

Tick one box

1 Yes

2 No

If walked or exercised [ SCAWE=1]

### **SCAWEH**

How much time did you spend walking or exercising yesterday?

For example, if you spent 30 minutes, write 0 in the hours box, and 30 in the minutes

boxes

Hours

### **SCAWEM**

How much time did you spend walking or exercising yesterday?

For example, if you spent 30 minutes, write 0 in the hours box, and 30 in the minutes

boxes

Minutes

### **SCAWEA**

How did you feel when you were walking or exercising yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(Seven point end labelled scale)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

### **SCAWEB**

How did you feel when you were walking or exercising yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(Seven point end labelled scale)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

### **SCAWEC**

How did you feel when you were walking or exercising yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt frustrated

(Seven point end labelled scale)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

### **SCAWED**

How did you feel when you were walking or exercising yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(Seven point end labelled scale)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

*END OF FILTER*

**SCAOTH**

Yesterday did you do any health-related activities other than walking or exercise? For example, visiting a doctor, taking medications or doing treatments.

Tick one box

Tick one box

1 Yes

2 No

*If did other health related activity [ SCAOTH=1]*

**SCAOTHH**

How much time did you spend doing health related activities yesterday?

Hours

**SCAOTHM**

How much time did you spend doing health related activities yesterday?

Minutes

**SCAOTA**

How did you feel when you were doing health related activities yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCAOTB**

How did you feel when you were doing health related activities yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCAOTC**

How did you feel when you were doing health related activities yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt frustrated

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCAOTD**

How did you feel when you were doing health related activities yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

*END OF FILTER*

**SCCOMM**

Yesterday did you travel or commute? E.g. by car, train, bus etc Tick one box

1 Yes

2 No

*If travelled or commuted [SCCOMM=1]*

**SCCOMH**

How much time did you spend travelling or commuting yesterday?

Hours

**SCCOMI**

How much time did you spend travelling or commuting yesterday?

Minutes

**SCCOH**

How did you feel when you were travelling or commuting yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCCOI**

How did you feel when you were travelling or commuting yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCCOF**

How did you feel when you were travelling or commuting yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt frustrated

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCCOS**

How did you feel when you were travelling or commuting yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

*END OF FILTER*

**SCFRIE**

Yesterday did you spend time with friends or family?

Tick one box

1 Yes

2 No

*If spent time with friends or family [SCFRIE=1]*

**SCFRIH**

How much time did you spend with friends or family yesterday?

Hours

**SCFRIM**

How much time did you spend with friends or family yesterday?

Minutes

**SCFRH**

How did you feel when you were with friends or family yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCFRIN**

How did you feel when you were with friends or family yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCFRF**

How did you feel when you were with friends or family yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt frustrated

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

**SCFRS**

How did you feel when you were with friends or family yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

*END OF FILTER*

**SCSELF**

Yesterday did you spend time at home by yourself? Without a spouse, partner, or anyone else present.

Tick one box

1 Yes

2 No

*If spent time at home by yourself [SCSELF=1]*

**SCSELH**

How much time did you spend at home by yourself yesterday?

Hours

**SCSELM**

How much time did you spend at home by yourself yesterday?

Minutes

**SCSEH**

How did you feel when you were at home by yourself yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt happy

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1.5

6 Feeling was extremely strong

**SCSEI**

How did you feel when you were at home by yourself yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCSEF**

How did you feel when you were at home by yourself yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt interested

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

**SCSES**

How did you feel when you were at home by yourself yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong. Tick one box on each line.

I felt sad

(*Seven point end labelled scale*)

0 Did not experience the feeling at all

1..5

6 Feeling was extremely strong

*END OF FILTER*

**SCOVHA**

Overall, how happy did you feel yesterday?

(*Eleven point end labelled scale*)

0 Not at all

1..9

10 Very much

98 Don't know

**SCOVAN**

Overall, how anxious did you feel yesterday?

(*Eleven point end labelled scale*)

0 Not at all

1..9

10 Very much

98 Don't know

**SCOVS**

Overall, how satisfied are you with your life nowadays?

(*Eleven point end labelled scale*)

0 Not at all

1..9

10 Very much

98 Don't know

**SCOVWO**

Overall, to what extent do you feel the things you do in your life are worthwhile?  
*(Eleven point end labelled scale)*

- 0 Not at all
- 1..9
- 10 Very much
- 98 Don't know

**SCVEG**

How many portions of vegetables – excluding potatoes – do you eat on a typical day?

If none, please enter '0'.

A serving or portion of vegetables means three heaped tablespoons of green or root vegetables such as carrots, parsnips, spinach, small vegetables like peas, baked beans or sweet corn, or a medium bowl of salad (lettuce, tomatoes, etc).

*Please write in portion*

**SCFRU**

How many portions of fruit – of any kind – do you eat on a typical day?

If none, please enter '0'.

A portion of fruit is an apple or banana, a small bowl of grapes, or three tablespoons of tinned or stewed fruit. If you drink fruit juice, you can count one glass per day, but additional glasses of fruit juice do not count as additional portions.

*Please write in portion*

**SCAKO**

Thinking now about all kinds of drink, how often have you had an alcoholic drink of any kind in the last 12 months?

- 1 Almost every day
- 2 Five or six days a week
- 3 Three or four days a week
- 4 Once or twice a week
- 5 Once or twice a month
- 6 Once every couple of months
- 7 Once or twice a year
- 8 Not at all in the last 12 months

IF How often drank alcohol in the last 12 months <> Not at all [SCako <> 8]

**SCAL7A**

Did you have an alcoholic drink in the seven days ending yesterday?

- 1 Yes
- 2 No

IF Whether had alcohol in the last 7 days = Yes [SCal7a = 1]

**SCAL7B**

On how many days out of the last seven did you have an alcoholic drink?

- 1 One
- 2 Two
- 3 Three
- 4 Four
- 5 Five
- 6 Six
- 7 Seven

**SCDRSPI**

During the last seven days, how many measures of spirits did you have?

Drinks poured at home may be larger than a pub single measure – please estimate number | | of singles.

If none, please enter '0'.

**SCDRWIN**

During the last seven days, how many pints of beer, lager or cider did you have?

If none, please enter '0'.

**SCDRPIN**

During the last seven days, how many glasses of wine did you have?

Include sherry, port, vermouth.

If none, please enter '0'.

END OF FILTER

END OF FILTER

**SCEND @**

If there is anything else you would like to tell us please write in this space below. We shall be very interested to read what you have to say.

Text: up to 100 characters

Contact

**Sexual relationships and activities self completion.**

Turquoise for men

Purple for women.

PDF archived. Question next not included here.

Questions for men and women labelled as in questionnaire (e.g. q1a)

Questions which are different for men and women labelled with m or f (e.g. Q12m and Q12f)

**CAPI introduction to self completion**

In a concurrent interview respondents take it in turns to complete self completion questionnaires while the other person does the private parts of the CAPI interview. In a single person household, the self completion questionnaires are just introduced at the end and the respondent can choose whether or not to complete them and then.

For Wave 6 people in existing sample households may have been given one self completion in advance of the interview. This did not happen in refreshment sample households. Sexual activity self completion questionnaires were never given in advance of the interview.

*If existing sample*

**SCINTL**

INTERVIEWER: DID YOU LEAVE OR SEND ORANGE MAIN SELF COMPLETIONS TO RESPONDENTS IN ADVANCE OF THE INTERVIEW?

01 Yes

02 No

*If left orange questionnaire in advance [SCINTL=1]*

**SCINTP**

I would now like to collect the paper questionnaires I left with you.

01 ORANGE main questionnaires collected from both respondents

02 ORANGE main questionnaire collected from one but not the other

03 Neither have completed the ORANGE paper questionnaires yet

*END OF FILTER*

*END OF FILTER*

*If concurrent interview [concur=1]*

**SCINTA**

I would now like to ask each of you some questions on your own.

While ^iname[1] answers these questions I would like ^iname[2] to leave the room and complete a paper questionnaire. When ^IName[1] has finished I'll ask ^IName[2] to come back in and we can swap over so that ^iname[1] does the paper questionnaire and ^IName[2] answers the questions on ^shisher own

Press 1 and ENTER

**SCSEXL**

^iname[2]

As well as the main ORANGE paper questionnaire I am also going to ask you to fill in a paper questionnaire about your sexual activities and attitudes. Please fill in the ^ turquoise\purple questionnaire ^first and then place it in the sealed envelope provided. Some of the questions are quite personal but I will not see your answers. ^When you have finished the ^turquoise\purple questionnaire please move on to the main orange questionnaire until I am ready to continue with your interview. Sexual relationships and activities relate to health, well-being and other aspects of people's lives, but we have very little information on whether and how they change as people grow older. Answers to these questions will help us to understand these changes better. The questionnaire has been designed so that you will only be asked questions which are relevant to you.

**SCGIV**

^iname[2]

INTERVIEWER: Give ^turquoise\purple self completion ^and orange questionnaire and envelope to ^IName[2].

Interviewer enter serial number and other information below on front of self completions.  
Ask ^him\her to leave the room."

**SCACCEP**

^iname[2]

INTERVIEWER: CODE WHETHER THE RESPONDENT ACCEPTED THE SEXUAL ACTIVITIES QUESTIONNAIRE:

01 Respondent accepted SEXUAL ACTIVITIES self-completion

02 SEXUAL ACTIVITIES Self-completion to be asked face to face by interviewer

03 Respondent refused SEXUAL ACTIVITIES self-completion

*If not accepted sexual activity self completion [ SCAccep=3]*

**SCACEPR**

**^iname[2]**

INTERVIEWER: Code reason for refusal of SEXUAL ACTIVITIES questionnaire.

CODE ALL THAT APPLY.

- 01 Eyesight problems
- 02 Could not read/write
- 03 Other disability
- 04 Objected to subject
- 05 Worried about confidentiality
- 06 Language problems
- 07 Ran out of time
- 08 Couldn't be bothered
- 95 Other - specify at next question

*[IF Other IN SCAccepR THEN]*

**SCACPX**

**^iname[2]**

INTERVIEWER: type in other answer given, press <ALT> + <S> when finished.

STRING[120]

END OF FILTER

END OF FILTER

**After private section of questionnaire for person 1**

**SC4ENDN**

This is almost the end of the interview. Thank you very much for taking part. I'm now going to ask ^IName[2] to come back into the room so I can ask him/her some questions on his/her own. I would like you to leave the room and complete a paper questionnaire.

**SC4SEXL**

**^iname[1]**

As well as the main ORANGE questionnaire I am also going to ask you to fill in a paper questionnaire about your sexual activities and attitudes. Please fill in the ^turquoise\purple questionnaire ^first and then place it in the sealed envelope provided.

Some of the questions are quite personal but I will not see your answers. ^When you have finished the ^turquoise\purple questionnaire please move on to the main orange questionnaire until I am ready to continue with your interview.

Sexual relationships and activities relate to health, well-being and other aspects of people's lives, but we have very little information on whether and how they change as people grow older. Answers to these questions will help us to understand these changes better. The questionnaire has been designed so that you will only be asked questions which are relevant to you."

**SC4GIV**

**"^iname[1]**

INTERVIEWER: Give ^turquoise\purple self completion ^ and orange questionnaire and envelope to ^IName[1].

Interviewer enter serial number and other information below on front of self completions.  
Ask ^him\her to leave the room.

**SC4ACCEP**

**^iname[1]**

INTERVIEWER: CODE WHETHER THE RESPONDENT ACCEPTED THE SEXUAL ACTIVITIES QUESTIONNAIRE:

- 01 Respondent accepted SEXUAL ACTIVITIES self-completion
- 02 SEXUAL ACTIVITIES Self-completion to be asked face to face by interviewer
- 03 Respondent refused SEXUAL ACTIVITIES self-completion

IF not accepted questionnaire [SC4Accep=3 THEN ]

**SC4ACCEPR**

^iname[1]

INTERVIEWER: code reason for refusal of SEXUAL ACTIVITIES questionnaire.

CODE ALL THAT APPLY.

- 01 Eyesight problems
- 02 Could not read/write
- 03 Other disability
- 04 Objected to subject
- 05 Worried about confidentiality
- 06 Language problems
- 07 Ran out of time
- 08 Couldn't be bothered
- 95 Other - specify at next question

[IF Other IN SC4Accepr THEN]

**SC4ACPX**

^iname[1]

INTERVIEWER: type in other answer given, press <ALT> + <S> when finished.

: STRING[120]

END OF FILTER

END OF FILTER

**SC4SXE**

^iname[2]

Ask ^Name[2] to come back into the room.

Code whether or not ^turquoise\purple SEXUAL ACTIVITIES self-completion was obtained from ^Name[2].

INTERVIEWER: this should usually have been completed. Encourage respondent to complete this while you are there if possible."

- 01 Completed by respondent, to be posted by interviewer
- 02 To be posted back by respondent
- 03 To be collected by Nurse
- 04 Respondent was interviewed in person but did not complete self-completion

**SC4END**

^iname[2]

Code whether or not ORANGE main self-completion was obtained from ^Name[2].

INTERVIEWER: Answer this question even if you have already obtained ORANGE questionnaire from them earlier.

INTERVIEWER: If ORANGE questionnaire is incomplete leave questionnaire with respondent to be posted back or given to the nurse.

- 01 Completed by respondent, to be posted by interviewer
- 02 To be posted back by respondent
- 03 To be collected by Nurse
- 04 Respondent was interviewed in person but did not complete self-completion

*If not completed both questionnaires*

SCRem4 "INTERVIEWER: Remind respondent to complete ^both questionnaires\the sexual activity questionnaire\the orange questionnaire and ^ place in the pre-paid envelope and have ready for the nurse to pick up at the nurse visit\ using the pre-paid envelope as soon as possible.

*END OF FILTER*

*After private part of interview completed for Name2*

**Sc5SXE**

That is the end of the interview. Thank you very much for taking part.

INTERVIEWER: Ask ^iname[1] to come back into the room

Code whether or not ^turquoise\purple SEXUAL ACTIVITIES self-completion was obtained from ^IName[1].

INTERVIEWER: this should usually have been completed. Encourage respondent to complete this while you are there if possible."

1 Completed by respondent, to be posted by interviewer

2 To be posted back by respondent

3 To be collected by Nurse

4 Respondent was interviewed in person but did not complete self-completion

**SC5End**

Code whether or not ORANGE self-completion was obtained from ^iname[1].

INTERVIEWER: Answer this question even if you have already obtained ORANGE questionnaire from them earlier.

INTERVIEWER: If ORANGE questionnaire is incomplete leave questionnaire with respondent to be posted back or given to the nurse."

1 Completed by respondent, to be posted by interviewer

2 To be posted back by respondent

3 To be collected by Nurse

4 Respondent was interviewed in person but did not complete self-completion

*If both questionnaires not completed*

**SCRem5**

INTERVIEWER: Remind respondent to complete ^both questionnaires\the sexual activity questionnaire\the orange questionnaire and ^ place in the pre-paid envelope and have ready for the nurse to pick up at the nurse visit\ using the pre-paid envelope as soon as possible.

*END OF FILTER*

*END OF FILTER*

**If a single person interview [concur=2]**

**Sc6End**

That is the end of the interview. Thank you for taking part.

Before I go, I would like to ^ collect the ORANGE paper questionnaire\ give you this paper questionnaire for you to fill in in your own time.

INTERVIEWER: ^ collect the ORANGE paper questionnaire\ Give ORANGE self-completion to respondent.

1 Completed by respondent, to be posted by interviewer

2 To be posted back by respondent

3 To be collected by interviewer at a later stage",

4 To be collected by Nurse

5 Respondent was interviewed in person but did not complete self-completion

**SC6SexII**

As well as the ORANGE paper questionnaire I am also going to ask you to fill in a paper questionnaire about your sexual activities and attitudes.

Please fill in the ^TURQUOISE\PURPLE questionnaire and then place it in the sealed envelope provided. Some of the questions are quite personal but I will not see your answers.

Sexual relationships and activities relate to health, well-being and other aspects of people's lives, but we have very little information on whether and how they change as people grow older. Answers to these questions will help us to understand these changes better. The questionnaire has been designed so that you will only be asked questions which are relevant to you.

**SC6GivI**

INTERVIEWER: Give ^TURQUOISE\PURPLE self completion and envelope to ^him\her.  
Interviewer first enter serial number and other information below on front of self completion.

**SC6Accep**

INTERVIEWER: CODE WHETHER THE RESPONDENT ACCEPTED THE SEXUAL ACTIVITIES QUESTIONNAIRE:

- 1 Respondent accepted SEXUAL ACTIVITIES self-completion
- 2 SEXUAL ACTIVITIES Self-completion to be asked face to face by interviewer
- 3 Respondent refused SEXUAL ACTIVITIES elf-completion

*If not accepted sexual activity self completion [IF SC6accep=3]*

**SC6AcepR**

INTERVIEWER: code reason for refusal of SEXUAL ACTIVITIES questionnaire.

CODE ALL THAT APPLY."

- 1 Eyesight problems",
  - 2 Could not read/write
  - 3 Other disability
  - 4 Objected to subject
  - 5 Worried about confidentiality
  - 6 Language problem
  - 7 Ran out of time
  - 8 Couldn't be bothered
- 95 Other - specify at next question

*[IF Other IN SC6AcepR]*

**SC6AcpX**

INTERVIEWER: type in other answer given, press <ALT> + <S>when finished."

: STRING[120]

END OF FILTER

END OF FILTER

*If accepted sexual activity questionnaire [SC6Accep=1]*

**SC6Comp**

This ^TURQUOISE\PURPLE questionnaire does not take long to complete. Would you like to complete it now while I wait or would you like me to collect it later? Alternatively you could post it back yourself.

- 1 Completed by respondent, to be posted by interviewer
- 2 To be posted back by respondent
- 3 To be collected by interviewer at a later stage",
- 4 To be collected by Nurse
- 5 Respondent was interviewed in person but did not complete self-completion

*If respondent or nurse will post back [SC6COMP=2 or 3]*

**SCRem6**

INTERVIEWER: Remind respondent to complete ^both questionnaires\the sexual activity questionnaire\the orange questionnaire and ^ place in the pre-paid envelope and have ready for the nurse to pick up at the nurse visit\ using the pre-paid envelope as soon as possible.

*END OF FILTER*

*END OF FILTER*

*END OF FILTER*



P3096

Serial number  

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

CK

Person  

--	--	--

First name  

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

Card

0 2

Interviewer ID No.  

--	--	--	--

Point No.  

--	--	--	--

# HEALTH AND LIFESTYLES OF PEOPLE AGED 50 AND OVER

## Self-Completion questionnaire

### In Confidence

#### HOW TO FILL IN THIS QUESTIONNAIRE

Please answer the questions by:

Ticking a box like this

Or writing a number in a box like this **3**

Sometimes you will find instructions telling you which questions to answer next like this:

Yes  → Go to **2**

No  → Go to **3**

Sometimes you will find a question asking how often you have done something over a period of time. If you have not done it at all, please write '0' in the box.

#### Please fill in your details below

Day      Month      Year

First name 

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

Date of birth 

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

#### HOW TO RETURN THIS QUESTIONNAIRE

If the interviewer is still in your home (or will be coming to your home for an interview) once you have completed the questionnaire, please hand it back to the interviewer. If not, please return the completed questionnaire in the pre-paid envelope as soon as you possibly can.

**PLEASE START THE QUESTIONNAIRE AT QUESTION **1** ON THE NEXT PAGE**

**THANK YOU AGAIN FOR YOUR HELP**

**1****Which of these statements apply to you?*****Tick all that apply***

- I read a daily newspaper  1
- I have a hobby or pastime  2
- I have taken a holiday in the UK in the last 12 months  3
- I have taken a holiday abroad in the last 12 months  4
- I have gone on a daytrip or outing in the last 12 months  5
- I own a mobile phone  6
- 
- None of these statements apply to me  7

**2****Are you a member of any of these organisations, clubs or societies?*****Tick all that apply***

- Political party, trade union or environmental groups  01
- Tenants groups, resident groups, Neighbourhood Watch  02
- Church or other religious groups  03
- Charitable associations  04
- Education, arts or music groups or evening classes  05 → **Go to 3**
- Social clubs  06
- Sports clubs, gyms, exercise classes  07
- Any other organisations, clubs or societies  08
- 
- No, I am not a member of any organisations, clubs or societies  09 → **Go to 4**

**3**

**Thinking about all the organisations, clubs or societies that you are a member of, how many committee meetings, if any, do you attend in a year? If none, please enter '0'.**

Please write the number in this box

**4**

**How easy or difficult is it for you to get to each of the following places using your usual forms of transport?**

***Tick one box on each line***

	Very easy	Quite easy	Quite difficult	Very difficult	Unable to go	Do not wish to go
Bank or cash point	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Post Office	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Corner shop	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Medium or large supermarket	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Shopping centre	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
General Practitioner (GP)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Chiropodist	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Dentist	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Optician	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Hospital	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

**5**

**Now some questions about your social activities. How often, if at all, do you do any of the following activities?**

***Tick one box on each line***

	Twice a month or more	About once a month	Every few months	About once or twice a year	Less than once a year	Never
Go to the cinema	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Eat out of the house	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Go to an art gallery or museum	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Go to the theatre, a concert or the opera	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

**6**

**Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?**

***Tick one box on each line***

	Yes	No
Go to the cinema	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Eat out of the house	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Go to an art gallery or museum	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Go to the theatre, a concert or the opera	<input type="checkbox"/> 1	<input type="checkbox"/> 2



7

We would now like to ask you some questions about your use of the Internet and email.

On average, how often do you use the Internet or email?

***Tick one box***

- |  |                            |                   |
|--|----------------------------|-------------------|
| Every day, or almost every day             | <input type="checkbox"/> 1 |                   |
| At least once a week (but not every day)   | <input type="checkbox"/> 2 |                   |
| At least once a month (but not every week) | <input type="checkbox"/> 3 | → Go to <b>8</b>  |
| At least once every 3 months               | <input type="checkbox"/> 4 |                   |
| Less than every 3 months                   | <input type="checkbox"/> 5 | → Go to <b>11</b> |
| Never                                      | <input type="checkbox"/> 6 |                   |

8

In which of the following places have you used the Internet or email in the last 3 months?

***Tick all that apply***

- |                                      |                            |
|--------------------------------------|----------------------------|
| At home                              | <input type="checkbox"/> 1 |
| At places of work (other than home)  | <input type="checkbox"/> 2 |
| At place of education                | <input type="checkbox"/> 3 |
| At another person's home             | <input type="checkbox"/> 4 |
| On the move                          | <input type="checkbox"/> 5 |
| Other place (library, Internet cafe) | <input type="checkbox"/> 6 |

9

On which of the following devices do you access the Internet?

***Tick all that apply***

- |   |                            |
|---|----------------------------|
| Desktop computer                                | <input type="checkbox"/> 1 |
| Laptop computer                                 | <input type="checkbox"/> 2 |
| Tablet computer (e.g. iPad, Samsung Galaxy Tab) | <input type="checkbox"/> 3 |
| Smartphone (e.g. iPhone, Blackberry)            | <input type="checkbox"/> 4 |
| TV (e.g. games console or set top box)          | <input type="checkbox"/> 5 |
| Other mobile devices                            | <input type="checkbox"/> 6 |
| Don't know                                      | <input type="checkbox"/> 7 |
| Do not access Internet                          | <input type="checkbox"/> 8 |

**10****For which of the following activities did you use the Internet in the last 3 months?*****Tick all that apply***

- |   |                             |
|---|-----------------------------|
| Sending/receiving e-mails   | <input type="checkbox"/> 01 |
| Finding information about goods and services  | <input type="checkbox"/> 02 |
| Searching for information for learning,<br>research, fact finding   | <input type="checkbox"/> 03 |
| Finances (banking, paying bills)  | <input type="checkbox"/> 04 |
| Shopping/ buying goods or services  | <input type="checkbox"/> 05 |
| Selling goods or services over the Internet e.g. via auctions   | <input type="checkbox"/> 06 |
| Use social networking sites (Facebook, Twitter, Myspace)  | <input type="checkbox"/> 07 |
| Creating, uploading or sharing content<br>(Youtube, blogging or Flickr)   | <input type="checkbox"/> 08 |
| News/ newspaper/ blog websites  | <input type="checkbox"/> 09 |
| Streaming/downloading live or on demand TV/radio (BBC iplayer,<br>4OD, ITV player, Demand 5) music (iTunes, Spotify), or ebooks | <input type="checkbox"/> 10 |
| Games   | <input type="checkbox"/> 11 |
| Looking for a job or sending a job application  | <input type="checkbox"/> 12 |
| Other   | <input type="checkbox"/> 13 |
| None of the above   | <input type="checkbox"/> 14 |

**11****The next two questions are about watching television.****How many hours of television do you watch on an ordinary day or evening during  
the week, that is, Monday to Friday?**

Please write in hours (from 0 to 24)

**12****And thinking now about an ordinary weekend. How many hours of television do you  
normally watch in total over the weekend, that is, Saturday and Sunday?**

Please write in hours (from 0 to 48)



**13**

Please say how much you agree or disagree with the following statements.

*Tick one box on each line*

	Strongly agree	Agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Disagree	Strongly disagree
--	-------------------	-------	-------------------	-------------------------------------	----------------------	----------	----------------------

In most ways my life is close to my ideal  1  2  3  4  5  6  7

The conditions of my life are excellent  1  2  3  4  5  6  7

I am satisfied with my life  1  2  3  4  5  6  7

So far I have got the important things I want in life  1  2  3  4  5  6  7

If I could live my life again, I would change almost nothing  1  2  3  4  5  6  7

**14**

Here are some questions about how you feel about your life in general.

Please say how much you agree or disagree with the following statements.

*Tick one box on each line*

	Strongly agree	Moderately agree	Slightly agree	Slightly disagree	Moderately disagree	Strongly disagree
--	-------------------	---------------------	-------------------	----------------------	------------------------	----------------------

At home, I feel I have control over what happens in most situations  1  2  3  4  5  6

I feel that what happens in life is often determined by factors beyond my control  1  2  3  4  5  6

In general, I have different demands that I think are hard to combine  1  2  3  4  5  6

In general, I have enough time to do everything  1  2  3  4  5  6

Considering the things I have to do at home, I have to work very fast  1  2  3  4  5  6

**15**

The next questions are about how you feel about different aspects of your life.

For each one, please say how often you feel that way.

*Tick one box on each line*

	Hardly ever or never	Some of the time	Often
--	-------------------------	---------------------	-------

How often do you feel you lack companionship?  1  2  3

How often do you feel left out?  1  2  3

How often do you feel isolated from others?  1  2  3

How often do you feel in tune with the people around you?  1  2  3

How often do you feel lonely?  1  2  3



16

Here is a list of statements that people have used to describe their lives or how they feel. How often, do you feel like this?

**Tick one box on each line**

	Often	Sometimes	Not often	Never
My age prevents me from doing the things I would like to	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel that what happens to me is out of my control	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel free to plan for the future	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel left out of things	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I can do the things that I want to do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Family responsibilities prevent me from doing what I want to do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel that I can please myself what I do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
My health stops me from doing things I want to do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Shortage of money stops me from doing the things I want to do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I look forward to each day	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel that my life has meaning	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I enjoy the things that I do	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I enjoy being in the company of others	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
On balance, I look back on my life with a sense of happiness	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel full of energy these days	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I choose to do things that I have never done before	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel satisfied with the way my life has turned out	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel that life is full of opportunities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I feel that the future looks good for me	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4





**20** Do you have any children?

***Tick one box***

- Yes  1 → **Go to 21**  
No  2 → **Go to 24**

**21** We would now like to ask you some questions about your children.  
Please tick the box which best shows how you feel about each statement.

***Tick one box on each line***

A lot    Some    A little    Not at  
all

How much do they really understand the way you feel  
about things?  1     2     3     4

How much can you rely on them if you have a  
serious problem?  1     2     3     4

How much can you open up to them if you need to  
talk about your worries?  1     2     3     4

How much do they criticise you?  1     2     3     4

How much do they let you down when you are  
counting on them?  1     2     3     4

How much do they get on your nerves?  1     2     3     4

How often do they make too many demands on you?  1     2     3     4

**22** On average, how often do you do each of the following with any of your children,  
not counting any who live with you?

***Tick one box on each line***

	Three or more times a week	Once or twice a week	Once or twice a month	Every few months	Once or twice a year	Less than once a year or never
--	-------------------------------------	----------------------------	-----------------------------	------------------------	----------------------------	---

Meet up (include both arranged  
and chance meetings)  1     2     3     4     5     6

Speak on the phone  1     2     3     4     5     6

Write or email  1     2     3     4     5     6

Send or receive text messages  1     2     3     4     5     6

**23** How many of your children would you say you have a close relationship with?

Please write the number in this box

**24**

**Do you have any other immediate family, for example, any brothers or sisters, parents, cousins or grandchildren?**

**Tick one box**

Yes  1 → **Go to 25**

No  2 → **Go to 28**

**25**

**We would now like to ask you some questions about these family members.  
Please tick the box which best shows how you feel about each statement.**

**Tick one box on each line**

A lot   Some   A little   Not at all

How much do they really understand the way you feel about things?  1    2    3    4

How much can you rely on them if you have a serious problem?  1    2    3    4

How much can you open up to them if you need to talk about your worries?  1    2    3    4

How much do they criticise you?  1    2    3    4

How much do they let you down when you are counting on them?  1    2    3    4

How much do they get on your nerves?  1    2    3    4

How often do they make too many demands on you?  1    2    3    4

**26**

**On average, how often do you do each of the following with any of these family members, not counting any who live with you?**

**Tick one box on each line**

Three or more times a week	Once or twice a week	Once or twice a month	Every few months	Once or twice a year	Less than once a year or never
----------------------------	----------------------	-----------------------	------------------	----------------------	--------------------------------

Meet up (include both arranged and chance meetings)  1    2    3    4    5    6

Speak on the phone  1    2    3    4    5    6

Write or email  1    2    3    4    5    6

Send or receive text messages  1    2    3    4    5    6

**27**

**How many of these family members would you say you have a close relationship with?**

Please write the number in this box



28

## Do you have any friends?

**Tick one box**

Yes  1 → Go to **29**

No  2 → Go to **32**

29

We would now like to ask you some questions about your friends.  
Please tick the box which best shows how you feel about each statement.

**Tick one box on each line**

A lot   Some   A little   Not at  
all

How much do they really understand the way you feel  
about things?  1  2  3  4

How much can you rely on them if you have a  
serious problem?  1  2  3  4

How much can you open up to them if you need to  
talk about your worries?  1  2  3  4

How much do they criticise you?  1  2  3  4

How much do they let you down when you are  
counting on them?  1  2  3  4

How much do they get on your nerves?  1  2  3  4

How often do they make too many demands on you?  1  2  3  4

30

On average, how often do you do each of the following with **any** of your friends, not  
counting any who live with you?

**Tick one box on each line**

Three or more times a week	Once or twice a week	Once or twice a month	Every few months	Once or twice a year	Less than once a year or never
-------------------------------------	----------------------------	-----------------------------	------------------------	----------------------------	---

Meet up (include both arranged  
and chance meetings)  1  2  3  4  5  6

Speak on the phone  1  2  3  4  5  6

Write or email  1  2  3  4  5  6

Send or receive text messages  1  2  3  4  5  6

31

How many of your friends would you say you have a close relationship with?

Please write the number in this box

**32**

The next questions are about paid employment.

Were you in paid employment last month?

***Tick one box***

Yes  1 → **Go to 33**

No  2 → **Go to 35**

**33**

Here are some statements people might use to describe their work. We would like to know how strongly you think these apply to the paid employment you did in the last month.

***Tick one box on each line***

	Strongly agree	Agree	Disagree	Strongly disagree
All things considered I am satisfied with my job	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
My job is physically demanding	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I receive the recognition I deserve for my work	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
My salary is adequate	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
My job promotion prospects are poor	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
My job security is poor	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I am under constant time pressure due to a heavy workload	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I have very little freedom to decide how I do my work	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I have the opportunity to develop new skills	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I receive adequate support in difficult situations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
At work, I feel I have control over what happens in most situations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Considering the things I have to do at work, I have to work very fast	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

**34**

At what age would you like to retire?

Write in years

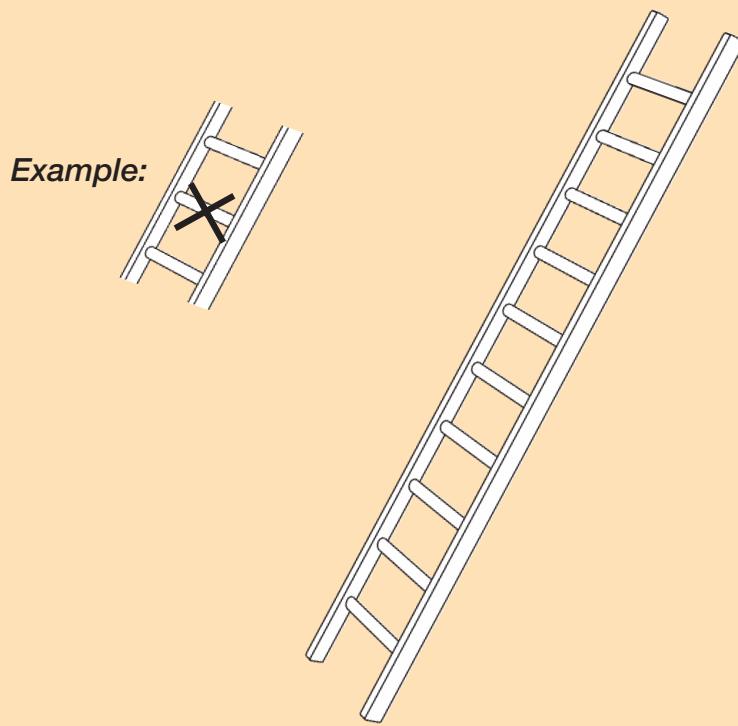
I have already retired

 1

**35**

Think of this ladder as representing where people stand in our society. At the top of the ladder are the people who are the best off – those who have the most money, most education and best jobs. At the bottom are the people who are the worst off – who have the least money, least education, and the worst jobs or no jobs. The higher up you are on this ladder, the closer you are to the people at the very top and the lower you are, the closer you are to the people at the very bottom.

Please mark a cross on the rung on the ladder where you would place yourself.

**36**

Now, please pause briefly to think about yesterday, from the morning until the end of the day. Think about where you were, what you were doing, who you were with, and how you felt.

What day of the week was it yesterday?

*Tick one box*

Monday      Tuesday      Wednesday      Thursday      Friday      Saturday      Sunday

 1 2 3 4 5 6 7**37**

What time did you wake up yesterday?

For example, if you woke up at 4:00AM, please write 04 in the hour boxes, 00 in the minutes boxes and AM in the last boxes.

Hours

Minutes

AM or PM

**38**

What time did you go to sleep at the end of the day yesterday?

For example, if you went to sleep at 11:30PM, please write 11 in the hour boxes, 30 in the minutes boxes and PM in the last boxes

Hours

Minutes

AM or PM



**39** Yesterday, did you feel any pain?

*Tick one box*

- |             |                            |
|-------------|----------------------------|
| None        | <input type="checkbox"/> 1 |
| A little    | <input type="checkbox"/> 2 |
| Some        | <input type="checkbox"/> 3 |
| Quite a bit | <input type="checkbox"/> 4 |
| A lot       | <input type="checkbox"/> 5 |

**40** Did you feel well-rested yesterday morning (that is you slept well the night before)?

*Tick one box*

- |     |                            |
|-----|----------------------------|
| Yes | <input type="checkbox"/> 1 |
| No  | <input type="checkbox"/> 2 |

**41** Was yesterday a normal day for you or did something unusual happen?

*Tick one box*

- |  |                            |
|--|----------------------------|
| Yes – just a normal day                            | <input type="checkbox"/> 1 |
| No, my day included unusual bad (stressful) things | <input type="checkbox"/> 2 |
| No, my day included unusual good things            | <input type="checkbox"/> 3 |

**42** Please think about the things you did yesterday. How did you spend your time and how did you feel?

Yesterday did you watch TV?

*Tick one box*

- |     |                            |                   |
|-----|----------------------------|-------------------|
| Yes | <input type="checkbox"/> 1 | → Go to <b>43</b> |
| No  | <input type="checkbox"/> 2 | → Go to <b>45</b> |

**43** How much time did you spend watching TV yesterday?

For example, if you spent one and a half hours, write 1 in the hours box and 30 in the minutes boxes.

Hours

Minutes



**44****How did you feel when you were watching TV yesterday?**

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.

***Tick one box on each line***

	Did not experience the feeling at all						Feeling was extremely strong	
	1	2	3	4	5	6		
Happy	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Interested	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Frustrated	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Sad	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		

**45****Yesterday did you work or volunteer?*****Tick one box***

- Yes  1 → Go to **46**  
No  2 → Go to **48**

**46****How much time did you spend working or volunteering yesterday?**

For example, if you spent nine and a half hours, write 9 in the hours box and 30 in the minutes box.

Hours Minutes **47****How did you feel when you were working or volunteering yesterday?**

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.

***Tick one box on each line***

	Did not experience the feeling at all						Feeling was extremely strong	
	1	2	3	4	5	6		
Happy	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Interested	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Frustrated	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		
Sad	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6		



48

**Yesterday did you go for a walk or exercise?****Tick one box**Yes  1 → Go to **49**No  2 → Go to **51**

49

**How much time did you spend walking or exercising yesterday?**Hours Minutes 

50

**How did you feel when you were walking or exercising yesterday?****Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.****Tick one box on each line**Did not  
experience the  
feeling at allFeeling was  
extremely  
strong

1      2      3      4      5      6

Happy  1     2     3     4     5     6Interested  1     2     3     4     5     6Frustrated  1     2     3     4     5     6Sad  1     2     3     4     5     6

51

**Yesterday did you do any health-related activities other than walking or exercise?****For example, visiting a doctor, taking medications or doing treatments.****Tick one box**Yes  1 → Go to **52**No  2 → Go to **54**

52

**How much time did you spend doing health-related activities yesterday?**Hours Minutes 

53

**How did you feel when you were doing health-related activities yesterday?****Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.****Tick one box on each line**Did not  
experience the  
feeling at allFeeling was  
extremely  
strong

1      2      3      4      5      6

Happy  1     2     3     4     5     6Interested  1     2     3     4     5     6Frustrated  1     2     3     4     5     6Sad  1     2     3     4     5     6

**54**

Yesterday did you **travel or commute**? E.g. by car, train, bus etc.

***Tick one box***

- Yes  1 → Go to **55**  
No  2 → Go to **57**

**55**

How much time did you spend **travelling or commuting** yesterday?

Hours Minutes **56**

How did you feel when you were **travelling or commuting** yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.

***Tick one box on each line***

Did not  
experience the  
feeling at all

Feeling was  
extremely  
strong

1      2      3      4      5      6

Happy  1     2     3     4     5     6

Interested  1     2     3     4     5     6

Frustrated  1     2     3     4     5     6

Sad  1     2     3     4     5     6

**57**

Yesterday did you **spend time with friends or family**?

***Tick one box***

- Yes  1 → Go to **58**  
No  2 → Go to **60**

**58**

How much time did you spend **with friends or family** yesterday?

Hours Minutes **59**

How did you feel when you were **with friends or family** yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.

***Tick one box on each line***

Did not  
experience the  
feeling at all

Feeling was  
extremely  
strong

1      2      3      4      5      6

Happy  1     2     3     4     5     6

Interested  1     2     3     4     5     6

Frustrated  1     2     3     4     5     6

Sad  1     2     3     4     5     6

**60**

Yesterday did you spend time at home by yourself? Without a spouse, partner, or anyone else present.

*Tick one box*

Yes  1 → Go to **61**

No  2 → Go to **63**

**61**

How much time did you spend at home by yourself yesterday?

Hours

Minutes

**62**

How did you feel when you were at home by yourself yesterday?

Rate each feeling on a scale from 0 – did not experience at all – to 6 – the feeling was extremely strong.

*Tick one box on each line*

Did not  
experience the  
feeling at all

Feeling was  
extremely  
strong

1

2

3

4

5

6

Happy

 1 2 3 4 5 6

Interested

 1 2 3 4 5 6

Frustrated

 1 2 3 4 5 6

Sad

 1 2 3 4 5 6**63**

Overall, how happy did you feel yesterday?

Not at  
all

Very  
Don't  
know

0

1

2

3

4

5

6

7

8

9

10

Don't  
know

 00 01 02 03 04 05 06 07 08 09 10 11**64**

Overall, how anxious did you feel yesterday?

Not at  
all

Very  
Don't  
know

0

1

2

3

4

5

6

7

8

9

10

Don't  
know

 00 01 02 03 04 05 06 07 08 09 10 11**65**

Overall, how satisfied are you with your life nowadays?

Not at  
all

Very  
Don't  
know

0

1

2

3

4

5

6

7

8

9

10

Don't  
know

 00 01 02 03 04 05 06 07 08 09 10 11



66

**Overall**, to what extent do you feel the things you do in your life are **worthwhile**?

Not at  
all

Very  
Don't  
know

0

1

2

3

4

5

6

7

8

9

10

 00 01 02 03 04 05 06 07 08 09 10 11

67

How many portions of vegetables – excluding potatoes – do you eat on a **typical day**?

If none, please enter '0'.

A serving or portion of vegetables means three heaped tablespoons of green or root vegetables such as carrots, parsnips, spinach, small vegetables like peas, baked beans or sweet corn, or a medium bowl of salad (lettuce, tomatoes, etc).

Please write in portion

How many portions of fruit – of any kind – do you eat on a **typical day**?

If none, please enter '0'.

A portion of fruit is an apple or banana, a small bowl of grapes, or three tablespoons of tinned or stewed fruit. If you drink fruit juice, you can count one glass per day, but additional glasses of fruit juice do not count as additional portions.

Please write in portion

68

Thinking now about all kinds of drinks, how often have you had an alcoholic drink of any kind during the last 12 months?

**Tick one box**

Almost every day

 1

Five or six days a week

 2

Three or four days a week

 3

Once or twice a week

 4

Once or twice a month

 5

Once every couple of months

 6

Once or twice a year

 7

Not at all in the last 12 months

 8

→ Go to **69**

→ Go to **74**

69

Did you have an alcoholic drink in the seven days ending yesterday?

**Tick one box**

Yes  1 → Go to **70**

No  2 → Go to **74**

**70**

On how many days out of the last seven did you have an alcoholic drink?

***Tick one box***

1

1

2

2

3

3

4

4

5

5

6

6

7

7

**71**

During the last seven days, how many measures of spirits did you have? Drinks poured at home may be larger than a pub single measure – please estimate number of singles. If none, please enter '0'.

Please write the number in this box

**72**

During the last seven days, how many glasses of wine did you have? Include sherry, port, vermouth. If none, please enter '0'.

Please write the number in this box

**73**

During the last seven days, how many pints of beer, lager or cider did you have? If none, please enter '0'.

Please write the number in this box

**74**

If there is anything else you would like to tell us, please write in the space below. We shall be very interested to read what you have to say.

**Thank you very much for taking the time to answer our questions.**

**Please give the questionnaire to the interviewer, or post back in the envelope provided.  
All your answers will remain confidential in accordance with the Data Protection  
Act 1998.**



F

P3096/FEMALE

ELSA

English  
Longitudinal  
Study of  
Ageing

Serial number								
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CK

Person

First name

Card

0 3

Version  
2

Interviewer ID No.

Point No.

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# SEXUAL RELATIONSHIPS AND ACTIVITIES

## Self-Completion questionnaire for women

### In Confidence

#### INTRODUCTION

This booklet contains questions that ask about your attitudes to sexual relationships and your own sexual activities. Some questions may be of a sensitive nature. However, your accurate and considered responses are very important for this research. Sexual relationships and activities relate to health, well-being and other aspects of people's lives, but we have very little information on whether and how they change as people grow older. Answers to these questions will help us understand possible changes, the reasons, and how changes in sexual relationships relate to other aspects of people's lives.

As with all other information you give us, your answers will be treated in the strictest confidence and used only for the purposes of this research.

The interviewer has a blank copy of the questionnaire to refer to if you need help in answering any questions so that they do not look at your copy.

You will find further explanations and instructions at the beginning of each section of the questionnaire. In the questionnaire there are sometimes instructions to go to certain questions – please follow these instructions carefully as they will take you to the questions which are relevant to you.

#### Please fill in your details below

First name

--

Date of birth

Day	Month	Year

#### HOW TO RETURN THIS QUESTIONNAIRE

If the interviewer is still in your home once you have completed the questionnaire, please place it in the envelope provided, seal the envelope and hand it back to the interviewer. If the interviewer has gone, please return the completed questionnaire in the pre-paid envelope as soon as you possibly can.

**PLEASE START THE QUESTIONNAIRE AT QUESTION 1 ON THE NEXT PAGE**

**THANK YOU AGAIN FOR YOUR HELP**

**NatCen**  
Social Research that works for society

 UCL

 Institute for  
Fiscal Studies

MANCHESTER  
1824

**1**

This question asks about **your personal attitudes** to sex. Please tick the one response that best describes your reaction to each of the following statements.

***Tick one box on each line***

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
----------------	-------	----------------------------	----------	-------------------

Having sexual relations before marriage is wrong  1  2  3  4  5

A married person having sexual relations with someone other than their spouse is wrong  1  2  3  4  5

Two adults of the same sex having sexual relations is wrong  1  2  3  4  5

Having one night stands is wrong  1  2  3  4  5

Satisfactory sexual relations are essential to the maintenance of a long-term relationship  1  2  3  4  5

Sexual relations without love is OK  1  2  3  4  5

People are under a lot of pressure to have sex nowadays  1  2  3  4  5

There's too much sex in the media nowadays  1  2  3  4  5

Young people today start having sex too early  1  2  3  4  5

Men have a naturally higher sex drive than women  1  2  3  4  5

The ability to have sex decreases as a person grows older  1  2  3  4  5

Sexual changes that occur with age are not important to older people  1  2  3  4  5

Being sexually active is physically and psychologically beneficial to older people  1  2  3  4  5

**2**

**The following questions ask about your own sexual drive or sexual desire during the past month.**

**How often did you think about sex during the past month? This includes times of just being interested in sex, daydreaming or fantasising about sex, as well as times when you wanted to have sex.**

***Tick one box***

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**3**

**Thinking about the past month, have you been worried or concerned by your level of sexual drive/desire?**

***Tick one box***

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**4**

**Compared with a year ago, has your sexual drive/desire changed?**

***Tick one box***

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |



**5** Have you had any sexual activity (sexual intercourse, masturbation, petting or fondling) in the past year?

*Tick one box*

Yes  1 → Go to **6**

No sexual activity in the past year  2 → Go to **26**

**6** The following questions ask about the frequency of your sexual activities during the past month.

How many times have you had or attempted sexual intercourse (vaginal, anal or oral sex) during the past month?

*Tick one box*

Not at all  1

Once in the past month  2

2 or 3 times in the past month  3

Once a week  4

2 or 3 times a week  5

Once a day  6

More than once a day  7

**7** Apart from when you attempted sexual intercourse, how frequently did you engage in other sexual activities (kissing, fondling and petting) during the past month?

*Tick one box*

Not at all  1

Once in the past month  2

2 or 3 times in the past month  3

Once a week  4

2 or 3 times a week  5

Once a day  6

More than once a day  7

**8****How often did you masturbate in the past month?*****Tick one box***

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**9****Thinking about the past month, have you been worried or concerned by the overall frequency of your sexual activities (sexual intercourse, kissing, fondling and petting and masturbation)?*****Tick one box***

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**10****How do you feel about the frequency of your sexual activities?*****Tick one box***

- |                           |                            |
|---------------------------|----------------------------|
| Too frequent              | <input type="checkbox"/> 1 |
| About the right frequency | <input type="checkbox"/> 2 |
| Not frequent enough       | <input type="checkbox"/> 3 |

**11****Compared with a year ago, has the overall frequency of your sexual activities changed?*****Tick one box***

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**12**

The following questions ask about your ability to become sexually aroused during the **past month**. It is not uncommon for women to experience arousal problems. This may mean that individuals may not always be able to engage in satisfactory sexual activity.

How often did you feel sexually aroused (turned on) during sexual activity (including intercourse or masturbation) during the **past month**?

**Tick one box**

- |   |                            |                   |
|---|----------------------------|-------------------|
| No sexual activity in past month                        | <input type="checkbox"/> 1 | → Go to <b>20</b> |
| Almost never/never aroused                              | <input type="checkbox"/> 2 |                   |
| Aroused a few times (much less than half the time)      | <input type="checkbox"/> 3 |                   |
| Aroused sometimes (about half the time)                 | <input type="checkbox"/> 4 | → Go to <b>13</b> |
| Aroused most of the time (much more than half the time) | <input type="checkbox"/> 5 |                   |
| Almost always/always aroused                            | <input type="checkbox"/> 6 |                   |

**13**

How often did you have an uncomfortably dry vagina during sexual activity during the **past month**?

**Tick one box**

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |

**14**

How often did you experience pain or discomfort during or after sexual activity during the **past month**?

**Tick one box**

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |



**15** Thinking of the past month, are you worried or concerned by your current ability to become sexually aroused?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**16** Compared with a year ago, has your ability to become sexually aroused changed?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**17** The following questions ask about your feelings of orgasm or climax in response to any sexual stimulation (including intercourse or masturbation) during the past month.

When you had sexual stimulation during the past month, how often did you have the feeling of orgasm or climax?

*Tick one box*

- |  |                            |                   |
|--|----------------------------|-------------------|
| No sexual intercourse/masturbation in past month | <input type="checkbox"/> 1 | → Go to <b>20</b> |
| Almost never/never orgasm or climax              | <input type="checkbox"/> 2 |                   |
| A few times (much less than half the time)       | <input type="checkbox"/> 3 |                   |
| Sometimes (about half the time)                  | <input type="checkbox"/> 4 | → Go to <b>18</b> |
| Most of the time (much more than half the time)  | <input type="checkbox"/> 5 |                   |
| Almost always/always                             | <input type="checkbox"/> 6 |                   |



**18** When you had sexual stimulation during the past month, how difficult was it for you to reach orgasm or climax?

*Tick one box*

- |                                |                            |
|--------------------------------|----------------------------|
| Extremely difficult/impossible | <input type="checkbox"/> 1 |
| Very difficult                 | <input type="checkbox"/> 2 |
| Moderately difficult           | <input type="checkbox"/> 3 |
| Slightly difficult             | <input type="checkbox"/> 4 |
| Not at all difficult           | <input type="checkbox"/> 5 |

**19** Thinking of the past month, are you worried or concerned by your current orgasmic experience?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**20** The following questions ask about your overall sex life over the past three months. Have you had any sexual activity with a partner during the past three months?

*Tick one box*

- |                        |  |
|------------------------|--|
| No, not at all         | <input type="checkbox"/> 1 → Go to <b>26</b> |
| Yes, one or more times | <input type="checkbox"/> 2 → Go to <b>21</b> |

**21** Who usually initiated sexual activity during the past three months?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| I did                           | <input type="checkbox"/> 1 |
| My partner(s) and I did equally | <input type="checkbox"/> 2 |
| My partner(s) did               | <input type="checkbox"/> 3 |





**22** During the past three months, how often did you have sex primarily because you felt obliged to or that it was your duty?

*Tick one box*

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |

**23** During the past three months, how often did you and your partner share the same sexual likes and dislikes?

*Tick one box*

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |

**24** During the past three months, how often did you feel emotionally close to your partner when you had sex together?

*Tick one box*

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |





**25** During the past three months, how satisfied have you been with your overall sex life?

***Tick one box***

- |                                    |                            |
|------------------------------------|----------------------------|
| Very satisfied                     | <input type="checkbox"/> 1 |
| Moderately satisfied               | <input type="checkbox"/> 2 |
| Neither satisfied nor dissatisfied | <input type="checkbox"/> 3 |
| Moderately dissatisfied            | <input type="checkbox"/> 4 |
| Very dissatisfied                  | <input type="checkbox"/> 5 |

**26** Even if you have not had any sexual activity, during the past three months how worried or concerned have you been about your overall sex life?

***Tick one box***

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**27** Have you sought help or advice regarding your sex life from any of the following sources during the past three months?

***Tick all that apply***

- |   |                             |
|---|-----------------------------|
| Family member/friend                                | <input type="checkbox"/> 01 |
| Self-help books/Information leaflets/Internet sites | <input type="checkbox"/> 02 |
| Self-help groups/Helpline                           | <input type="checkbox"/> 03 |
| GP/Family doctor                                    | <input type="checkbox"/> 04 |
| Sexual health clinic                                | <input type="checkbox"/> 05 |
| Psychiatrist or psychologist                        | <input type="checkbox"/> 06 |
| Relationship counsellor                             | <input type="checkbox"/> 07 |
| Other type of clinic or health care professional    | <input type="checkbox"/> 08 |
| Have not sought any help                            | <input type="checkbox"/> 09 |



**28** Finally, we would like to know a little about your lifetime sexual experiences and desires. Which statement best describes your sexual experiences over your lifetime? Please include all sexual experiences including sexual intercourse, fondling and petting.

**Tick one box**

- |   |                            |
|---|----------------------------|
| Entirely with men                               | <input type="checkbox"/> 1 |
| Mostly with men, but some experience with women | <input type="checkbox"/> 2 |
| Equally with men and women                      | <input type="checkbox"/> 3 |
| Mostly with women, but some experience with men | <input type="checkbox"/> 4 |
| Entirely with women                             | <input type="checkbox"/> 5 |
| No sexual experiences in lifetime               | <input type="checkbox"/> 6 |

**29** Which statement best describes your sexual desires over your lifetime? Please include being interested in sex, fantasising about sex or wanting to have sex?

**Tick one box**

- |  |                            |
|--|----------------------------|
| Entirely for men                           | <input type="checkbox"/> 1 |
| Mostly for men, but some desires for women | <input type="checkbox"/> 2 |
| Equally for men and women                  | <input type="checkbox"/> 3 |
| Mostly for women, but some desires for men | <input type="checkbox"/> 4 |
| Entirely for women                         | <input type="checkbox"/> 5 |
| No sexual desires in lifetime              | <input type="checkbox"/> 6 |

**30** How many sexual partners (someone with whom you have had vaginal, anal or oral sex) have you had in your lifetime? **Tick one box**

- |                            |                            |                            |                            |                            |                            |
|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| 0                          | 1                          | 2–4                        | 5–9                        | 10–19                      | 20 or more                 |
| <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 | <input type="checkbox"/> 6 |

**31** If there is anything else you would like to tell us, please write in the space below. We shall be very interested to read what you have to say.

Thank you for taking the time to complete this questionnaire.

Please place it in the envelope provided and seal it and give it back to the interviewer or post it back. All your answers will remain confidential in accordance with the Data Protection Act 1998.





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Interviewer ID No.	Point No.

# SEXUAL RELATIONSHIPS AND ACTIVITIES

## Self-Completion questionnaire for men

### In Confidence

#### INTRODUCTION

This booklet contains questions that ask about your attitudes to sexual relationships and your own sexual activities. Some questions may be of a sensitive nature. However, your accurate and considered responses are very important for this research. Sexual relationships and activities relate to health, well-being and other aspects of people's lives, but we have very little information on whether and how they change as people grow older. Answers to these questions will help us understand possible changes, the reasons, and how changes in sexual relationships relate to other aspects of people's lives.

As with all other information you give us, your answers will be treated in the strictest confidence and used only for the purposes of this research.

The interviewer has a blank copy of the questionnaire to refer to if you need help in answering any questions so that they do not look at your copy.

You will find further explanations and instructions at the beginning of each section of the questionnaire. In the questionnaire there are sometimes instructions to go to certain questions – please follow these instructions carefully as they will take you to the questions which are relevant to you.

#### Please fill in your details below

First name

Date of birth

Day	Month	Year

#### HOW TO RETURN THIS QUESTIONNAIRE

If the interviewer is still in your home once you have completed the questionnaire, please place it in the envelope provided, seal the envelope and hand it back to the interviewer. If the interviewer has gone, please return the completed questionnaire in the pre-paid envelope as soon as you possibly can.

**PLEASE START THE QUESTIONNAIRE AT QUESTION 1 ON THE NEXT PAGE**

**THANK YOU AGAIN FOR YOUR HELP**



1

This question asks about **your personal attitudes** to sex. Please tick the one response that best describes your reaction to each of the following statements.

***Tick one box on each line***

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
----------------	-------	----------------------------	----------	-------------------

Having sexual relations before marriage is wrong  1  2  3  4  5

A married person having sexual relations with someone other than their spouse is wrong  1  2  3  4  5

Two adults of the same sex having sexual relations is wrong  1  2  3  4  5

Having one night stands is wrong  1  2  3  4  5

Satisfactory sexual relations are essential to the maintenance of a long-term relationship  1  2  3  4  5

Sexual relations without love is OK  1  2  3  4  5

People are under a lot of pressure to have sex nowadays  1  2  3  4  5

There's too much sex in the media nowadays  1  2  3  4  5

Young people today start having sex too early  1  2  3  4  5

Men have a naturally higher sex drive than women  1  2  3  4  5

The ability to have sex decreases as a person grows older  1  2  3  4  5

Sexual changes that occur with age are not important to older people  1  2  3  4  5

Being sexually active is physically and psychologically beneficial to older people  1  2  3  4  5

**2**

The following questions ask about your own sexual drive or sexual desire during the past month.

How often did you think about sex during the past month? This includes times of just being interested in sex, daydreaming or fantasising about sex, as well as times when you wanted to have sex.

*Tick one box*

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**3**

Thinking about the past month, have you been worried or concerned by your level of sexual drive/desire?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**4**

Compared with a year ago, has your sexual drive/desire changed?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**5**

Have you had any sexual activity (sexual intercourse, masturbation, petting or fondling) in the past year?

*Tick one box*

- |  |                            |                   |
|--|----------------------------|-------------------|
| Yes  | <input type="checkbox"/> 1 | → Go to <b>6</b>  |
| No sexual activity in the <u>past year</u> | <input type="checkbox"/> 2 | → Go to <b>12</b> |

**6**

**The following questions ask about the frequency of your sexual activities during the past month.**

**How many times have you had or attempted sexual intercourse (vaginal, anal or oral sex) during the past month?**

**Tick one box**

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**7**

**Apart from when you attempted sexual intercourse, how frequently did you engage in other sexual activities (kissing, fondling and petting) during the past month?**

**Tick one box**

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**8**

**How often did you masturbate in the past month?**

**Tick one box**

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**9**

Thinking about the past month, have you been worried or concerned by the overall frequency of your sexual activities (sexual intercourse, kissing, fondling and petting and masturbation)?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**10**

How do you feel about the frequency of your sexual activities?

*Tick one box*

- |                           |                            |
|---------------------------|----------------------------|
| Too frequent              | <input type="checkbox"/> 1 |
| About the right frequency | <input type="checkbox"/> 2 |
| Not frequent enough       | <input type="checkbox"/> 3 |

**11**

Compared with a year ago, has the overall frequency of your sexual activities changed?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**12**

The following questions ask about your ability to have an erection. It is not uncommon for men to experience erectile problems. This may mean that individuals may not always be able to get or keep an erection that is rigid enough for satisfactory sexual activity (including intercourse or masturbation).

Please tick the one statement or response that best describes you during the past month.

*Tick one box*

- |   |                            |
|---|----------------------------|
| Always able to get and keep an erection which would be good enough for sexual activity    | <input type="checkbox"/> 1 |
| Usually able to get and keep an erection which would be good enough for sexual activity   | <input type="checkbox"/> 2 |
| Sometimes able to get and keep an erection which would be good enough for sexual activity | <input type="checkbox"/> 3 |
| Never able to get and keep an erection which would be good enough for sexual activity     | <input type="checkbox"/> 4 |

**13**

Thinking of the past month, have you been worried or concerned by your ability to have an erection?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**14**

Compared with a year ago, has your ability to have an erection changed?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**15**

The following questions ask about your feelings of orgasm or climax leading to ejaculation of semen in response to any sexual stimulation (including intercourse or masturbation) during the past month.

When you had sexual stimulation during the past month, how often did you have the feeling of orgasm or climax?

*Tick one box*

- |  |                            |                   |
|--|----------------------------|-------------------|
| No sexual intercourse/masturbation in past month | <input type="checkbox"/> 1 | → Go to <b>20</b> |
| Almost never/never orgasm or climax              | <input type="checkbox"/> 2 |                   |
| A few times (much less than half the time)       | <input type="checkbox"/> 3 |                   |
| Sometimes (about half the time)                  | <input type="checkbox"/> 4 | → Go to <b>16</b> |
| Most of the time (much more than half the time)  | <input type="checkbox"/> 5 |                   |
| Almost always/always                             | <input type="checkbox"/> 6 |                   |



**16** When you had sexual stimulation during the past month, how difficult was it for you to reach orgasm or climax?

*Tick one box*

- |                                |                            |
|--------------------------------|----------------------------|
| Extremely difficult/impossible | <input type="checkbox"/> 1 |
| Very difficult                 | <input type="checkbox"/> 2 |
| Moderately difficult           | <input type="checkbox"/> 3 |
| Slightly difficult             | <input type="checkbox"/> 4 |
| Not at all difficult           | <input type="checkbox"/> 5 |

**17** In the past month, how satisfied have you been with your sense of control over the timing of your orgasm? Not being satisfied can mean taking too long to climax or climaxing too early.

*Tick one box*

- |                      |                            |                   |
|----------------------|----------------------------|-------------------|
| Extremely satisfied  | <input type="checkbox"/> 1 | → Go to <b>19</b> |
| Highly satisfied     | <input type="checkbox"/> 2 |                   |
| Moderately satisfied | <input type="checkbox"/> 3 |                   |
| Slightly satisfied   | <input type="checkbox"/> 4 | → Go to <b>18</b> |
| Not at all satisfied | <input type="checkbox"/> 5 |                   |

**18** Continuing to think about the past month, how would you describe the timing of your orgasm or climax? Would you say it was:

*Tick one box*

- |                     |                            |
|---------------------|----------------------------|
| Always too early    | <input type="checkbox"/> 1 |
| Sometimes too early | <input type="checkbox"/> 2 |
| Sometimes too late  | <input type="checkbox"/> 3 |
| Always too late     | <input type="checkbox"/> 4 |
| Do not climax       | <input type="checkbox"/> 5 |

**19** Thinking of the past month, have you been worried or concerned by your orgasmic experience?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**20**

The following questions ask about your morning or night-time erections. Men may awaken with an erection after dreaming or in the morning, although this can vary from day to day.

How frequently did you awaken with a full erection during the past month?

*Tick one box*

- |                                |                            |
|--------------------------------|----------------------------|
| Not at all                     | <input type="checkbox"/> 1 |
| Once in the past month         | <input type="checkbox"/> 2 |
| 2 or 3 times in the past month | <input type="checkbox"/> 3 |
| Once a week                    | <input type="checkbox"/> 4 |
| 2 or 3 times a week            | <input type="checkbox"/> 5 |
| Once a day                     | <input type="checkbox"/> 6 |
| More than once a day           | <input type="checkbox"/> 7 |

**21**

Whether or not you have had morning or night-time erections in the past month, have you been worried or concerned by the frequency of your morning or night-time erections?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**22**

Compared with a year ago, has the frequency of your morning or night-time erections changed?

*Tick one box*

- |                                 |                            |
|---------------------------------|----------------------------|
| Increased a lot                 | <input type="checkbox"/> 1 |
| Increased moderately            | <input type="checkbox"/> 2 |
| Neither increased nor decreased | <input type="checkbox"/> 3 |
| Decreased moderately            | <input type="checkbox"/> 4 |
| Decreased a lot                 | <input type="checkbox"/> 5 |

**23**

The following questions ask about your overall sex life over the past **three months**. Have you had any sexual activity with a partner during the past three months?

*Tick one box*

No, not at all  1 → Go to **29**

Yes, one or more times  2 → Go to **24**

**24**

Who usually initiated sexual activity during the past three months?

*Tick one box*

I did  1

My partner(s) and I did equally  2

My partner(s) did  3

**25**

During the past **three months**, how often did you have sex primarily because you felt obliged to or that it was your duty?

*Tick one box*

Almost never/never  1

A few times (much less than half the time)  2

Sometimes (about half the time)  3

Most of the time (much more than half the time)  4

Almost always/always  5

**26**

During the past **three months**, how often did you and your partner share the same sexual likes and dislikes?

*Tick one box*

Almost never/never  1

A few times (much less than half the time)  2

Sometimes (about half the time)  3

Most of the time (much more than half the time)  4

Almost always/always  5



**27** During the past three months, how often did you feel emotionally close to your partner when you had sex together?

*Tick one box*

- |   |                            |
|---|----------------------------|
| Almost never/never                              | <input type="checkbox"/> 1 |
| A few times (much less than half the time)      | <input type="checkbox"/> 2 |
| Sometimes (about half the time)                 | <input type="checkbox"/> 3 |
| Most of the time (much more than half the time) | <input type="checkbox"/> 4 |
| Almost always/always                            | <input type="checkbox"/> 5 |

**28** During the past three months, how satisfied have you been with your overall sex life?

*Tick one box*

- |                                    |                            |
|------------------------------------|----------------------------|
| Very satisfied                     | <input type="checkbox"/> 1 |
| Moderately satisfied               | <input type="checkbox"/> 2 |
| Neither satisfied nor dissatisfied | <input type="checkbox"/> 3 |
| Moderately dissatisfied            | <input type="checkbox"/> 4 |
| Very dissatisfied                  | <input type="checkbox"/> 5 |

**29** During the past three months, have you used any oral medications (Viagra, Cialis, Levitra) to enhance your erections?

*Tick one box*

- |     |                            |                   |
|-----|----------------------------|-------------------|
| No  | <input type="checkbox"/> 1 | → Go to <b>32</b> |
| Yes | <input type="checkbox"/> 2 | → Go to <b>30</b> |

**30** During the past three months, how often did you use these oral medications to enhance your erections?

*Tick one box*

- |                                   |                            |
|-----------------------------------|----------------------------|
| Once in the past 3 months         | <input type="checkbox"/> 1 |
| 2 or 3 times in the past 3 months | <input type="checkbox"/> 2 |
| Once a month                      | <input type="checkbox"/> 3 |
| 2 or 3 times a month              | <input type="checkbox"/> 4 |
| Once a week                       | <input type="checkbox"/> 5 |
| 2 or 3 times a week               | <input type="checkbox"/> 6 |
| Once a day                        | <input type="checkbox"/> 7 |

**31****How would you rate the effect of these medications on your sex life?*****Tick one box***

- |                               |                            |
|-------------------------------|----------------------------|
| Very positive                 | <input type="checkbox"/> 1 |
| Positive                      | <input type="checkbox"/> 2 |
| Neither positive nor negative | <input type="checkbox"/> 3 |
| Negative                      | <input type="checkbox"/> 4 |
| Very negative                 | <input type="checkbox"/> 5 |

**32****Even if you have not had any sexual activity, during the past three months how worried or concerned have you been about your overall sex life?*****Tick one box***

- |                                   |                            |
|-----------------------------------|----------------------------|
| Not at all worried or concerned   | <input type="checkbox"/> 1 |
| A little bit worried or concerned | <input type="checkbox"/> 2 |
| Moderately worried or concerned   | <input type="checkbox"/> 3 |
| Very worried or concerned         | <input type="checkbox"/> 4 |
| Extremely worried or concerned    | <input type="checkbox"/> 5 |

**33****Have you sought help or advice regarding your sex life from any of the following sources during the past three months?*****Tick all that apply***

- |   |                             |
|---|-----------------------------|
| Family member/friend                                | <input type="checkbox"/> 01 |
| Self-help books/Information leaflets/Internet sites | <input type="checkbox"/> 02 |
| Self-help groups/Helpline                           | <input type="checkbox"/> 03 |
| GP/Family doctor                                    | <input type="checkbox"/> 04 |
| Sexual health clinic                                | <input type="checkbox"/> 05 |
| Psychiatrist or psychologist                        | <input type="checkbox"/> 06 |
| Relationship counsellor                             | <input type="checkbox"/> 07 |
| Other type of clinic or health care professional    | <input type="checkbox"/> 08 |
| Have not sought any help                            | <input type="checkbox"/> 09 |



**34** Finally, we would like to know a little about your lifetime sexual experiences and desires. Which statement best describes your sexual experiences over your lifetime? Please include all sexual experiences including sexual intercourse, fondling and petting.

***Tick one box***

- |   |                            |
|---|----------------------------|
| Entirely with women                             | <input type="checkbox"/> 1 |
| Mostly with women, but some experience with men | <input type="checkbox"/> 2 |
| Equally with women and men                      | <input type="checkbox"/> 3 |
| Mostly with men, but some experience with women | <input type="checkbox"/> 4 |
| Entirely with men                               | <input type="checkbox"/> 5 |
| No sexual experiences in lifetime               | <input type="checkbox"/> 6 |

**35** Which statement best describes your sexual desires over your lifetime? Please include being interested in sex, fantasising about sex or wanting to have sex?

***Tick one box***

- |  |                            |
|--|----------------------------|
| Entirely for women                         | <input type="checkbox"/> 1 |
| Mostly for women, but some desires for men | <input type="checkbox"/> 2 |
| Equally for women and men                  | <input type="checkbox"/> 3 |
| Mostly for men, but some desires for women | <input type="checkbox"/> 4 |
| Entirely for men                           | <input type="checkbox"/> 5 |
| No sexual desires in lifetime              | <input type="checkbox"/> 6 |

**36** How many sexual partners (someone with whom you have had vaginal, anal or oral sex) have you had in your lifetime?

***Tick one box***

0	1	2–4	5–9	10–19	20 or more
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

**37** If there is anything else you would like to tell us, please write in the space below. We shall be very interested to read what you have to say.

Thank you for taking the time to complete this questionnaire.

Please place it in the envelope provided and seal it and give it back to the interviewer or post it back. All your answers will remain confidential in accordance with the Data Protection Act 1998.

# **English Longitudinal Study of Ageing**

## **END OF LIFE**

**Wave Six END OF LIFE Questionnaire – 2012 to 2013**

**Prepared by NatCen**

**Version 2.0 MAY 2015**

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## **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

### **Routing**

<> - This annotation is used to indicate 'not equals to'.

### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information. Some have been converted to group the data to reduce disclosiveness.

@@ - This annotation is used to indicate that a financial variable has not been archived for reasons of disclosiveness. Small quantities of data mean it has not been converted into a non-disclosive derived variable either.

### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks included in the End of Life questionnaire are not included within this documentation. If information is needed about checks please contact the ELSA team.

### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 2.0 MAY 2015**

# **WAVE 6 ELSA**

## **End of Life interview**

### ***About the respondent***

#### **SERIAL @**

Serial Number

Range: 1..9999999999

[Don't Know and Refusal are not allowed]

#### **FIRST @**

INTERVIEWER: For your information... You are in the questionnaire for serial number [Serial] - To enter the questionnaire press and . - To update the Admin details, press .1 Press and to continue.

#### **INTDAT @ (See INTDATMM and INTDATYY for month and year of interview)**

INTERVIEWER: Today's date. Amend if not correct. Else, press to continue.

[Don't Know and Refusal are not allowed]

ELSE

#### **DECEASED ELSA RESPONDENT'S NAME @**

ELSA respondent's first name.

STRING 30

#### **EINAME2 @**

ELSA respondent's surname.

STRING 30

#### **EIDATLA @ (See EIDatLaMM and EIDatLAYY for month and year of last interview)**

Date of last ELSA interview

END FILTER

(EiSex included in dataset but not in questionnaire – sex of deceased)

#### **EIINTRO @**

You may be aware that [^deceased ELSA respondent's name] generously participated in the ELSA study before

[^his/her] death. [^His/Her] contribution was very valuable. We would find it extremely helpful to have some information about the final year of [^his/her] life. I appreciate that this may upset or distress you. All the information collected is strictly confidential, and will be held anonymously.

INTERVIEWER: Press 1 and to continue.

Range: 1..1

#### **EINTR2 @**

Before we begin, I'd like to ask you some questions about you.

1 Continue

**EIRREL**

SHOW CARD EI1

What was your relationship to [^deceased ELSA respondent's name]? Were you [^his/her]...

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step-son/step-daughter/child of partner
- 07 Son-in-law/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Step-parent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother-in-law/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative (specify)
- 22 Other non-relative (specify)

*IF Relationship was other relative or other non relative [EiRRel = 21 or 22]***EIRRELOT @**

INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to [^deceased ELSA respondent's name].

STRING 100

*IF Relationship was other non relative [EiRRel = 22]***EIRFRI**

Would you say [^he/she] was a close friend, or not?

- 1 Yes
- 2 No
- 3 Other

END FILTER

END FILTER

*IF NOT a spouse or partner [(EiRRel <> 1 and EiRRel <> 2)]***SURVSP**

INTERVIEWER ASK OR CODE: Did [^deceased ELSA respondent's name] have a surviving spouse/partner at the time of [^his/her] death?

- 1 Yes
- 2 No

| END FILTER

*If respondent is not a child, parent, sibling or grandparent [ NOT(Eirrel IN [NatCh, NatPar, NatSib, Grandch, GrandPar])]*

**EIRKNO**

How long had you known [^him/her]?

READ OUT...

1 ...more than one month, but less than one year,

2 ...between one and two years,

3 ...over two years?

*IF How long had you known =up to one or two years [EIRKNO= 1 or 2]*

| **NUMMTH**

| INTERVIEWER: Enter the number of months the respondent has known the deceased.

| Range: 0..11

END OF FILTER

*IF How long had you known = over two years| [EIRKNO= 3]*

| **NUMYR**

| INTERVIEWER: Enter the number of years the respondent has known the deceased.

| Range: 0..97

| | END FILTER

| END FILTER

END FILTER

**EIRAGE** @ (DVEIRAGE includes aged 90 and over collapsed to avoid disclosure)

What was your age last birthday?

Range: 0..120

**EIRSEX**

INTERVIEWER: Ask or code respondent's sex.

1 Male

2 Female

***Scenario of ELSA respondent's death***

**EILONG**

I would now like to ask you a few questions about things that happened at the time of

[^deceased ELSA respondent's name]'s death. How long had [^he/she] been ill before [^he/she] died?

- 1 Was not ill, died suddenly
- 2 Less than 24 hours
- 3 One day or more, but less than one week
- 4 One week or more but less than one month
- 5 One month or more but less than 6 months
- 6 6 months or more but less than a year
- 7 One year or more
- 8 Don't know

*IF death was sudden [EiLong =1]*

**EISUDD**

Would you say [^his/her] death was unexpected?

- 1 Yes
- 2 No
- 3 Other
- 4 Don't know

*IF death was not unexpected [EiSudd = No]*

**EISUDEX @**

Why was [^his/her] death expected?

STRING 200

END FILTER

ELSE

*If Death was not sudden [(EiLong 2...9)] OR (EiLong = / REFUSAL)]*

**EIEXPT**

Would you say [^his/her] death was expected, or unexpected?

- 1 Expected
- 2 Unexpected
- 95 Other (please specify at next question)
- 96 Don't know

*IF Other answer in would you say death was expected [EiExPt = Other]*

**EIEXPTOT @**

INTERVIEWER: Enter details.

STRING 250

END FILTER

END FILTER

END FILTER

**EICAUS @** (See DCEiCaus for backcoded and summarized variable to avoid non-disclosure)

SHOW CARD EI2

What was the main cause of [^deceased ELSA respondent's name]'s death?

- 1 Cancer
- 2 Heart Attack
- 3 Stroke
- 4 Other cardiovascular related illness
- 5 Respiratory disease
- 95 Other (Please specify)
- 96 Don't know

*IF cause of death was other [EiCaus = Other]*

**EICAUSOT @**

INTERVIEWER: Please enter details of the cause of death.

STRING 200

END FILTER

**EIDATED @**

May I ask, on what date did [^he/she] die?

INTERVIEWER: Enter the day of month at this question.

Range: 1..31

**EIDATEM @**

INTERVIEWER: Enter month at this question.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**EIDATEY**

INTERVIEWER: Enter year at this question.

Range: 2000..2050

**EIPLAC**

And where did [^deceased ELSA respondent's name] die? Was it ...READ OUT...

- 01 ...at home,
- 02 in sheltered housing,
- 03 at another person's home,
- 04 in hospital,
- 05 in a hospice,
- 06 in a nursing home,

07 in a care home,  
08 in a mixed nursing /residential home,  
09 in an ambulance/en route to hospital/en route to hospice etc?  
95 Other (Please specify)

*IF place of death was other [EiPlac = 95 Other]*

**EIPLACOT @**

(What was this other place?)

INTERVIEWER: Write in.

STRING 100

ELSE

*IF died in another person's home [EiPlac = 3]*

**EIPLACOH**

In whose home did [^deceased ELSA respondent's name] die?

1 Relative

2 Non-relative

END FILTER

END FILTER

*IF did not die at home [EiPlac = 3..9 or 95]*

**EIPLCN**

On how many different occasions did [[^deceased ELSA respondent's name] stay in [place] in the last two years before [^he/she] died?

INTERVIEWER: If appropriate include more than one person's home  
INTERVIEWER: Specify the number

of times.

Range: 1..95

**EIPLCL**

In total, how long did [^deceased ELSA respondent's name] stay in [^place from EiPlac] in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

1 One day or more, but less than one week

2 One week or more but less than one month

3 One month or more but less than 3 months

4 3 months or more but less than 6 months

5 6 months or more but less than a year

6 A year or more

7 Don't know

END FILTER

**EILIVINT**

I would now like to ask you some questions about where [^deceased ELSA respondent's name] lived or stayed overnight as a result of [^his/her] health in the two years before [^he/she] died.

1 Continue



**EILIVE**

**[Multiple responses to EILIVE are recorded in variables EILIVE1 to EILIVE9]**

SHOW CARD EI3

How many other types of places did [^deceased ELSA respondent's name] stay in overnight during the two years before [^he/she] died, because of [^his/her] health?

INTERVIEWER: Include NHS and privately-owned establishments CODE ALL THAT APPLY.

01 At home

02 In sheltered housing

03 Other person's home

04 In hospital

05 In a hospice

06 In a nursing home

07 In a care home

08 In a mixed nursing /care home

09 In a guest house/B and B

91 Not known whether residential or care home

95 Other place (Specify at next question)

96 Stayed at no other places

(In addition there are backcoded categories from other answers: 9 = hotel/ B and B, 91= unknown whether nursing or care home)

*If lived or stayed in another person's home [EILive =3]*

**EIHOMESTY**

In whose home did [^deceased ELSA respondent's name] stay?

1 Relative

2 Non-relative

3 Both relative and non-relative

**EILOTHA**

On how many different occasions did [^deceased ELSA respondent's name] stay in another person's home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILOTHB**

In total, how long did [^deceased ELSA respondent's name] stay in another person's home in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

1 One day or more, but less than one week

2 One week or more but less than one month

3 One month or more but less than 3 months

4 3 months or more but less than 6 months

5 6 months or more but less than a year

6 A year or more

7 Don't know

END FILTER

*If lived or stayed in hospital [EILLive =4]*

**EILHOSPA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a hospital in the

| last two years before [^e/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

### **EILHOSPB**

In total, how long did [^deceased ELSA respondent's name] stay in a hospital in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

|  
END FILTER

*If lived or stayed in hospice [EiLive=5]*

### **EILHPCEA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a hospice in the last two years before [^he/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

### **EILHPCEB**

In total, how long did [^deceased ELSA respondent's name] stay in a hospice in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

|  
END FILTER

*If lived or stayed in a nursing home [ EiLive=6]*

### **EILNURSA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a nursing home in the last two years before [^he/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

### **EILNURSB**

In total, how long did [^deceased ELSA respondent's name] stay in a nursing home in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

*IF lived or stayed in a care home [EILive=7]*

#### **EILRESA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a residential home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

#### **EILRESB**

In total, how long did [^deceased ELSA respondent's name] stay in a residential home in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

*IF lived or stayed in a mixed nursing and care home [EILive=8]*

#### **EILMIXA**

On how many different occasions did [^deceased ELSA respondent's name] stay in mixed nursing/residential home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

#### **EILMIXB**

In total, how long did [^deceased ELSA respondent's name] stay in mixed nursing/residential home in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 Less than 24 hours
- 2 One day or more, but less than one week
- 3 One week or more but less than one month
- 4 One month or more but less than 3 months
- 5 3 months or more but less than 6 months
- 6 6 months or more but less than a year
- 7 A year or more
- 8 Don't know

END FILTER

*IF lived or stayed in sheltered housing [EiLive=2]*

**EILSHELA**

On how many different occasions did [^deceased ELSA respondent's name] stay in sheltered housing in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILSHELB**

In total, how long did [^deceased ELSA respondent's name] stay in sheltered housing in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

*IF lived or stayed in other place EiLive=95 (other)]*

**EILIVEA**

How many other types of places did [^he/she] stay in during the two years before [^he/she] died?

INTERVIEWER: If more than one other place, record each place at a separate question.

Range: 1..5

*IF How many other types of place = RESPONSE [EiLIVEa = RESPONSE]*

LOOP FOR idx:= 1 TO EiLIVEa

**EILIVEB @**

**[Loop: Responses to EILIVEB are recorded in variables EILIVE1 to EILIVE5]**

(What was this other place)?

INTERVIEWER: Write in the other place.

STRING 100

**EILEXTA**

**[Loop: Responses to EILEXTA are recorded in variables EILEXT1 to EILEXT5]**

On how many different occasions did [^deceased ELSA respondent's name] stay in this place in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILEXTB**

**[Loop: Responses to EILEXTB are recorded in variables EILEXT1 to EILEXT5]**

In total, how long did [^deceased ELSA respondent's name] stay in this place in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.  
 1 One day or more, but less than one week  
 2 One week or more but less than one month  
 3 One month or more but less than 3 months  
 4 3 months or more but less than 6 months  
 5 6 months or more but less than a year  
 6 A year or more  
 7 Don't know

END FILTER

END FILTER

END FILTER

## ***Activities and help***

### **EIDISTPH**

SHOW CARD EI4

We'd like to ask you about [^deceased ELSA respondent's name]'s physical health and activity. During [^his/her]

last year, which of these descriptions fits [^his/her] experience best?

- 1 [^He/She] was active and disability free, and died suddenly
- 2 [^He/She] was mostly active and disability free, but declined during the last few months before [^he/she] died
- 3 [^He/She] had times of being seriously disabled, mixed with times of being active
- 4 [^He/She] gradually became more and more disabled, without times of being active
- 5 None of these
- 6 Don't know

### **EIADLINT @**

I would now like to ask you about problems [^deceased ELSA respondent's name] might have had in [^his/her] everyday life, before [^he/she] died. The next questions are about help [^he/she] may have received. Please tell me if [^he/she] had received any help because of a physical, mental, emotional or memory problem during the last three months of [^his/her] life.

INTERVIEWER: Press and to continue.

Range: 1..1

### **EIADLA**

During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...

INTERVIEWER: READ OUT ... dressing, including putting on shoes and socks?

- 1 Yes
- 2 No
- 3 Don't know

### **EIADLB**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... walking across a room?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLC**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... bathing or showering?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLD**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... eating such as cutting up [^his/her] food?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLE**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... getting in or out of bed?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLF**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... using the toilet, including getting up and down?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLG**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... preparing hot meals?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLH**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... shopping for groceries?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLI**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... making telephone calls?

- 1 Yes
- 2 No
- 3 Don't know

**EIADLJ**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... taking medication?

- 1 Yes
- 2 No
- 3 Don't know

*IF needed help with dressing in last three months of life [EiADLA = Yes]*

**EIADLA2**

In total, for how long had [^he/she] needed help with dressing when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?

96 Don't know

*If needed help with dressing for one month or less [EIADLA2 = 1]*

**EIADLA2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with dressing for more than one month to two years [EIADLA2 =2 or3]*

**EIADLA2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with dressing for more than two years [EIADLA2 =4]*

**EIADLA2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with walking in last three months of life [EiADLB= Yes]*

**EIADLB2**

For how long had [^he/she] needed help with walking, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less

- | 2 more than one month, but less than one year
- | 3 between one and two years
- | 4 or, over two years?
- | 96 Don't know

*If needed help with walking for one month or less [EiADLB2 = 1]*

**EiADLB2W**

- | In total, how many weeks was this?
- | Range : 1..4
- | ELSE

*If needed help with walking for more than one month to two years [EiADLB2 =2 or3]*

**EiADLB2M**

- | In total, how many months was this?
- | Range : 2..24
- | ELSE

*If needed help with walking for more than two years [EiADLB2 =4]*

**EiADLB2Y**

- | In total, how many years was this?
- | Range : 3..97
- | ND FILTER
- | END FILTER
- | ELSE

*IF did not need help with walking in last three months of life [EiADLB= No]*

**EiADLB3**

During the last three months of [^his/her] life, was [^deceased ELSA respondent's name] able to walk 100 yards by [^him/herself] and without using any special equipment? Did [^he/she] have ...READ OUT...

- | 1 ...no difficulty,
- | 2 some difficulty,
- | 3 much difficulty,
- | 4 was unable to do this?
- | 5 Don't know

*IF had no difficulty walking 100 yards by him/herself [EiADLB3 = 1]*

**EiADLB4**

During the last three months of [^his/her] life, was [^deceased ELSA respondent's name] able to walk for a quarter of a mile by [^him/herself] and without using any special equipment? Did [^he/she] have ...READ OUT...

- | 1 ...no difficulty,
- | 2 some difficulty,
- | 3 much difficulty,
- | 4 was unable to do this?
- | 5 Don't know

END FILTER

END FILTER

END FILTER

*If needed help with bathing or showering in last three months of life [EiADLC= Yes]*

**EiADLC2**

In total, for how long had [^he/she] needed help with bathing or showering, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If needed help with bathing or showering for one month or less [EiADLC2 = 1]*

**EiADLC2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with bathing or showering for more than one month to two years [EiADLC2 =2 or3]*

**EiADLC2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with bathing or showering for more than two years [EiADLC2 =4]*

**EiADLC2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*If needed help with eating in last three months of life [EiADLD= Yes]*

**EiADLD2**

In total, for how long had [^he/she] needed help with eating when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If needed help with eating for one month or less [EiADLD2 = 1]*

**EiADLD2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with eating for more than one month to two years [EiADLD2 =2 or3]*

**EiADLD2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with eating for more than two years [EIADLD2 =4]*

**EIADLD2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

ELSE

*If needed help with getting in or out of bed in last three months of life [EiADLE= Yes]*

**EiADLE2**

In total, for how long had [^he/she] needed help getting in or out of bed, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with getting in or out of bed for one month or less [EIADLE2 = 1]*

**EiADLE2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with getting in or out of bed for more than one month to two years [EIADLE2 =2 or3]*

**EIADLE2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with getting in or out of bed for more than two years [EIADLE2 =4]*

**EIADLE2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*If needed help with using the toilet in last three months of life [EiADLF= Yes]*

**EIADLF2**

In total, for how long had [^he/she] needed help with using the toilet, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with using the toilet for one month or less [EiADLF2 = 1]*

**EiADLF2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with using the toilet for more than one month to two years [EiADLF2 =2 or3]*

**EiADLF2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with using the toilet for more than two years [EiADLF2 =4]*

**EiADLF2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with preparing hot meals in last three months of life [EiADLG= Yes]*

**EiADLG1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help to prepare hot meals.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

1 Yes

2 No

3 Don't know

**EiADLG2**

In total, for how long had [^he/she] needed help with preparing hot meals, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with preparing hot meals for one month or less [EiADLG2 = 1]*

**EiADLG2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with preparing hot meals for more than one month to two years [EiADLG2 =2 or3]*

**EiADLG2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with preparing hot meals for more than two years [EiADLG2 =4]*

**EIADLG2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with shopping for groceries in last three months of life [EiADLH= Yes]*

**EIADLH1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help with shopping for groceries.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

1 Yes

2 No

3 Don't know

**EIADLH2**

In total, for how long had [^he/she] needed help with shopping for groceries, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with shopping for groceries for one month or less [EiADLH2 = 1]*

**EiADLH2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with shopping for groceries for more than one month to two years [EiADLH2 =2 or3]*

**EIADLH2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with shopping for groceries for more than two years [EiADLH2 =4]*

**EIADLH2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with making telephone calls in last three months of life [EiADL1= Yes]*

**EIADLI1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help to make phone calls.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

- 1 Yes
- 2 No
- 3 Don't know

**EIADLI2**

In total, for how long had [^he/she] needed help making telephone calls, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?

96 Don't know

*If needed help with making telephone calls for one month or less [EIADLI2 = 1]*

**EiADLI2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with making telephone calls for more than one month to two years [EIADLI2 =2 or3]*

**EIADLI2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with making telephone calls for more than two years [EIADLI2 =4]*

**EIADLI2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with taking medication in last three months of life [EiADLJ= Yes]*

**EIADLJ1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received

help with taking medication.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

- 1 Yes
- 2 No
- 3 Don't know

**EIADLJ2**

In total, for how long when [^he/she] died had [^he/she] needed help when taking medication?

@@@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with taking medication for one month or less [EIADLJ2 = 1]*

**EIADLJ2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with taking medication for more than one month to two years [EIADLJ2 =2 or3]*

**EIADLJ12M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with taking medication for more than two years [EIADLJ2 =4]*

**EIADLJ12Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

**EIADLK**

Were there any other activities that [^deceased ELSA respondent's name] had problems with in the last 3 months of [^his/her] life?

1 Yes

2 No

3 Don't know

*IF there were any other difficulties with activities [EiADLK = Yes]*

**EIADLK0** @ (but back coded other answers are available in EiADLKZ1..10 based on answers to EIADLK0)

What other activities did they have problems with?

STRING 50

**EIADLK2**

Did anyone help [^him/her] with these activities?

1 Yes

2 No

3 Don't know

END FILTER

## EiHCnt

Computed: number of ADLS deceased ELSA respondent had problems with [computed from answers to EiALDA...K]

*| IF needed help with at least one ADL 1 [EiHCnt >= 1]*

### EIWHLPL

**[Multiple responses to EIWHLPL are recorded in variables EIWHLPL01 to EIWHLPL17]**

SHOW CARD EI5

Thinking about the [^activity from EiADLA..K] that [^deceased ELSA respondent's name] had problems with, who usually helped [^deceased ELSA respondent's name] with [^this\these activity\ies]?

| PROBE: Did anyone else help [^deceased ELSA respondent's name] with [^this\these activity\ies] (including yourself)?

| CODE ALL THAT APPLY.

- | 1 Husband or wife or partner
- | 2 Son
- | 3 Daughter
- | 4 Sister
- | 5 Brother
- | 6 Other relative
- | 7 Privately paid help
- | 8 Local authority / social services helper e.g. home care worker
- | 9 Nurse, e.g. health visitor or district nurse
- | 10 Member of staff at the care/nursing home
- | 11 Friend or neighbour
- | 95 Other person

| **EIWHLPLF** (NB – owing to an error in the questionnaire this duplicates categories in EIWHLPL. These questions should not have overlapped. Analysts will need to check for overlap between EIWHLPL = 7..11 and categories at EIWHLPLF)

| SHOWCARDE15a

| Thinking about the [^activity from EiADLA..K] that [^deceased ELSA respondent's name] had problems with, who usually |helped [^deceased ELSA respondent's name] with [^this\these activity\ies]? PROBE: Did anyone else |help [^deceased ELSA respondent's name] with [^this\these activity\ies]?

| CODE ALL THAT APPLY.

- | 1 Home care worker/ home help/ personal assistant
- | 2 A member of the reablement / intermediate care staff team
- | 3 Voluntary helper
- | 4 Warden / Sheltered housing manager
- | 5 Cleaner
- | 6 Council's handyman
- | 7 Member of staff at the care/nursing home
- | 8 Other - please specify
- | 9 None of the above

END FILTER

## **Cognitive ability**

### **EICOGINT @**

Now I would like to ask you some questions about [^deceased ELSA respondent's name]'s memory and concentration during [^his/her] last year of life.

1 Continue

### **EICOGA**

Did [^deceased ELSA respondent's name] have difficulty remembering things about [^his/her] family and friends, like occupations, birthdays or addresses? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGB**

Did [^he/she] have difficulty remembering things that had happened recently? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGC**

Did [^he/she] have difficulty recalling conversations a few days after they had taken place? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGD**

Did [^he/she] have difficulty remembering [^his/her] address and telephone number? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGE**

Did [^he/she] have difficulty remembering what day and month it was? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGF**

Did [^deceased ELSA respondent's name] have difficulty remembering where things were usually kept? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,

3 or, great difficulty?

4 SPONTANEOUS: Don't know

#### **EICOGG**

Did [^he/she] have difficulty following a story in a book, on the radio or on the TV? Did he have ... READ OUT ...

1 ...no difficulty,

2 slight difficulty,

3 or, great difficulty?

4 SPONTANEOUS: Don't know

#### **EICOGH**

Did [^he/she] have difficulty making decisions on everyday matters? Did he have ...

READ OUT ...

1 ...no difficulty,

2 slight difficulty,

3 or, great difficulty?

4 SPONTANEOUS: Don't know

#### **EICOGI**

Did [^he/she] have difficulty handling financial matters, like [^his/her] pension or dealing with the bank? Did he have ... READ OUT ...

1 ...no difficulty,

2 slight difficulty,

3 or, great difficulty?

4 SPONTANEOUS: Don't know

#### **EICOGJ**

Did [^he/she] ever forget what had been said and repeat the same question again and again? IF YES, PROBE: Did [^he/she] do this occasionally or frequently?

1 No

2 Occasionally

3 Frequently

4 Don't know

#### **EICOGK**

Did [^deceased ELSA respondent's name] have difficulty in interpreting surroundings, such as knowing where [^he/she] was, or distinguishing between different types of people, such as doctors, visitors and relatives? Did he have ... READ OUT ...

1 ...no difficulty,

2 slight difficulty,

3 or, great difficulty?

4 SPONTANEOUS: Don't know

#### **EICOGL**

Did [^he/she] have difficulty finding the way about [^the/ his/her home] or finding the toilet? Did he have ... READ OUT ...

1 ...no difficulty,

2 slight difficulty,

3 great difficulty,

4 Not applicable

5 Don't know

**EICOGM**

When speaking, did [^he/she] sometimes have difficulty finding the right word, or sometimes use the wrong words? IF YES, PROBE: Did [^he/she] do this occasionally or frequently?

- 1 No
- 2 Yes, occasionally
- 3 Yes, frequently
- 4 Don't know

**EICOGN**

Did [^deceased ELSA respondent's name] sometimes repeat the same word or phrase over and over again?

- 1 No
- 2 Yes
- 3 Don't know

**EICOGO**

Did [^his/her] thinking seem muddled at times?

- 1 No
- 2 Yes
- 3 Don't know

*IF had any of the cognitive difficulties at EiCogJ, EiCogK, EiCogL, EiCogM, EiCogN, EiCogO,*

*[NOT (((((EiCogJ = No) AND (EiCogK = No)) AND (EiCogL = No)) AND (EiCogM = No))  
AND (EiCogN = No)) AND (EiCogO = No)) AND NOT (((((EiCogJ = NONRESPONSE  
AND EiCogK = NONRESPONSE) AND EiCogL = NONRESPONSE) AND EiCogM =  
NONRESPONSE) AND EiCogN = NONRESPONSE) AND EiCogO =  
NONRESPONSE)]*

**EICOGP**

How long were these changes or difficulties with memory and concentration present?

PROBE: From about how long before [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If these changes or difficulty were present for one month or less [EICOGP= 1]*

**EICOGPW**

In total, how many weeks was this?

Range : 1..4

ELSE

*If these changes or difficulty were present for more than one month to two years [EICOGP =2 or3]*

**EICOGPM**

In total, how many months was this?

Range: 2..24

ELSE

*If changes or difficulty were present for more than two years [EICOGP =4]*

**EiCOGPY**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

**EICOGQ**

Did these changes or difficulties develop gradually or did they come on suddenly?

1 Gradually

2 Suddenly

3 Don't know

END FILTER

**EICOGR**

Were there marked fluctuations in [^his/her] level of attention or alertness?

1 No

2 Yes

3 Don't know

*If there were marked fluctuations in attention or alertness [EiCogR = Yes]*

**EICOGS**

How long were these fluctuations in [^his/her] levels of attention or alertness present?

PROBE: From about how long before [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If these fluctuations were present for one month or less [EICOGS= 1]*

**EICOGSW**

In total, how many weeks was this?

Range : 1..4

ELSE

*If these fluctuations were present for more than one month to two years [EICOGS =2 or3]*

**EICOGSM**

In total, how many months was this?

Range: 2..24

ELSE

*If fluctuations were present for more than two years [EICOGS =4]*

**EICOGSY**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

END FILTER

### **Problem behaviour**

#### **EITIMEIN @**

Now I'm going to describe some difficult behaviors, which only a minority of people experience, and which can make caring for them more of a challenge. I would like you to tell me how frequently, if at all [^deceased ELSA respondent's name] engaged in these behaviors during [^his/her] last year of life. We would like to know if [^deceased ELSA respondent's name] engaged in the behavior often, sometimes, rarely, or never.

INTERVIEWER: Press and to continue.

Range: 1..1

#### **EIPBHA**

SHOW CARD EI6

During [^his/her] last year of life, how often did [^deceased ELSA respondent's name] have temper tantrums? Was it often, sometimes, rarely, or never?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

#### **EIPBHB**

SHOW CARD EI6

And did [^deceased ELSA respondent's name] make violent threats or attempts? How often did [^he/she] do this?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

#### **EIPBHC**

SHOW CARD EI6

How often did [^deceased ELSA respondent's name] break things on purpose?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

#### **EIPBHD**

SHOW CARD EI6

How often did [^deceased ELSA respondent's name] cause complaints from the community?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Not applicable
- 6 Don't know

#### **EIPBHE**

**SHOW CARD EI6**

During [^his/her] last year of life, how often did [^deceased ELSA respondent's name] engage in strange or peculiar behaviour?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

**EIPBHF****SHOW CARD EI6**

And how often did [^deceased ELSA respondent's name]'s behaviour cause complaints from family members?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

***Mental health*****EIMHFINT @**

I would now like to ask you a few questions about [^deceased ELSA respondent's name]'s mood during the last year of [^his/her] life.

- 1 Continue

**EIMHFA**

Did [^he/she] seem to lose interest or enjoyment in most things, during [^his/her] last year of life?

- 1 No
- 2 Yes
- 3 Don't know

**EIMHFB**

Do you think that [^he/she] was inclined to blame [^him/herself] or feel unreasonably guilty about things during [^his/her] last year of life?

- 1 No
- 2 Yes
- 3 Don't know

**EIMHFC**

Do you think [^he/she] was depressed during [^his/her] last year of life? IF YES, PROBE:

Was [^he/she] depressed sometimes or frequently?

- 1 No
- 2 Yes, sometimes
- 3 Yes, frequently
- 4 Don't know

*IF lost interest or enjoyment in things, felt guilty or was depressed [(EiMHFA = Yes) OR (EiMHFB = Yes) OR (EiMHFC = 2 or 3)]*

**EIMHFD**

| Do you think there was a reason for [^him/her] to [^lose interest or enjoyment in things/ feel guilty

about things/ feel depressed about things] during this time?

- | 1 No
- | 2 Yes
- | 3 Don't know

#### **EIMHFE**

| Did [^he/she] feel so bad that it affected every part of [^his/her] life, (like [^his/her] work, friendship and family life) during [^his/her] last year of life?

- | 1 No
- | 2 Yes
- | 3 Don't know

#### **EIMHFF**

| How long had [^he/she] felt like this, when [^he/she] died?

| INTERVIEWER: Code how the answer is given.

| @/~/READ OUT...

- | 1 one month or less
- | 2 more than one month, but less than one year
- | 3 between one and two years
- | 4 or, over two years?

| 96 Don't know

| *If felt like this for one month or less [EIMHFF= 1]*

#### **EIMHFFW**

| In total, how many weeks was this?

| Range : 1..4

| ELSE

| *If felt like this for more than one month to two years [EIMHFF =2 or3]*

#### **EIMHFFM**

| In total, how many months was this?

| Range: 2..24

| ELSE

| *If felt like this for more than two years [EIMHFF =4]*

#### **EIMHFFY**

| In total, how many years was this?

| Range : 3..97

| END FILTER

| END FILTER

#### **EIMHFG**

SHOW CARD EI6

How often do you think [^deceased ELSA respondent's name] felt happy during [^his/her] last year of life?

- | 1 Often
- | 2 Sometimes
- | 3 Rarely
- | 4 Never

5 Don't know

#### **EIMHFH**

SHOW CARD EI6

How often do you think [^deceased ELSA respondent's name] felt contented or at peace during [^his/her] last year of life?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

#### **EIMHFI**

SHOW CARD EI6

And how about the last three months of [^his/her] life, how often do you think [^deceased ELSA respondent's name] felt contented or at peace during this time?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

### ***Sight and hearing***

#### **EIHRINT @**

The next questions are about problems [^deceased ELSA respondent's name] may have had with [^his/her] eyesight or hearing, during the last 3 months of [^his/her] life.

- 1 Continue

#### **EIEYE**

Was [^deceased ELSA respondent's name]'s eyesight (using glasses or corrective lens as usual)...READ OUT...

- 1 excellent,
- 2 very good,
- 3 fair,
- 4 or, poor?
- 5 SPONTANEOUS: Registered or legally blind

#### **EIOPT**

**[Multiple responses to EIOPT are recorded in variables EIOPT1 to EIOPT4, EIOPT96 ]**

Did a doctor ever tell [^deceased ELSA respondent's name] that [^he/she] had any of these conditions?

INTERVIEWER: Read out each in turn and code all that apply. Include diabetic retinopathy in code 2. Include age related maculopathy in code 3.

- 1 Glaucoma or suspected glaucoma
- 2 Diabetic eye disease
- 3 Macular degeneration
- 4 Cataracts
- 96 None of these

*IF doctor ever told deceased they had cataracts [EiOpt=4]*

**EICAT**

Did [^deceased ELSA respondent's name] ever have cataract surgery?

- 1 Yes
- 2 No
- 3 Don't know

END FILTER

**EIHEAR**

Was [^deceased ELSA respondent's name]'s hearing (using a hearing aid as usual)...READ OUT...

- 1 excellent
- 2 very good
- 3 fair
- 4 or, poor?

## ***Cardiovascular conditions***

**EICAINT @**

I would now like to ask you a few questions about other conditions that [^deceased ELSA respondent's name] may have suffered from.

- 1 Continue

*IF Heart Attack was the main cause of death [QScenario.EiCaus = 2]*

**EICAHA**

You told me earlier that [^deceased ELSA respondent's name] died following a heart attack. Did a doctor ever tell [^him/her] that [^he/she] had had a heart attack, before the one that led to [^his/her] death?

- 1 Yes
- 2 No
- 3 Don't know

ELSE

*| IF Stroke was the main cause of death [QScenario.EiCaus = 3]*

**EICAST**

You told me earlier that [^deceased ELSA respondent's name] died following a stroke. Did a doctor ever tell [^him/her] that [^he/she] had had a stroke, before the one that led to [^his/her] death?

- 1 Yes
- 2 No
- 3 Don't know

END FILTER

END FILTER

**EIDIAA**

**[Multiple responses to EIDIAA are recorded in variables EIDIAA1 to EIDIAA9]**

SHOW CARD EI7

[^ And apart from this did\ Did] a doctor ever tell [^him/her] that [^he/she] had any [^other] of the

conditions on this

card? PROBE : What others? CODE ALL THAT APPLY.

01 High blood pressure or hypertension

02 Angina

03 A heart attack (including myocardial infarction or coronary thrombosis)

04 Congestive heart failure

05 A heart murmur

06 An abnormal heart rhythm

07 Diabetes or high blood sugar

08 A stroke (cerebral vascular disease)

09 High cholesterol

95 Any other heart trouble (SPECIFY)

96 None of these

*IF doctor ever told deceased he/she had other condition [EiDiaA= 95 (other)]*

**EIDIX @**

INTERVIEWER: Enter the name of the other heart condition.

STRING 50

END FILTER

*IF doctor ever told deceased he/she had high blood pressure or hypertension [ EiDiaA=1]*

**EIBPST**

Did [^deceased ELSA respondent's name] have high blood pressure during the last 12 months of [^his/her] life?

1 Yes

2 No

**EIMDA**

Was [^deceased ELSA respondent's name] taking any medicines, tablets or pills for high blood pressure during the last 12 months of [^his/her] life?

1 Yes

2 No

3 Don't know

END FILTER

*IF doctor ever told deceased he/she had angina [ EiDiaA=2]*

**EIAGA**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had angina?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIYR1**

Did [^deceased ELSA respondent's name] have angina during the last 12 months of [^his/her] life?

1 Yes

2 No

| END

/ IF doctor ever told deceased he/she had angina or heart attack [EiDiaA=2 OR EiDiaA=2]

**EiHMed**

Was [^deceased ELSA respondent's name] taking any medication to thin the blood such as Warfarin, Plavix, Ticlid, or other blood-thinning medication during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

If deceased was told by the doctor they had had a heart attack  
[(EiDiaA=3) OR (EiCaHa = Yes)]

**EIAGB**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had had a heart attack (including myocardial infarction or coronary thrombosis)?

INTERVIEWER: Enter the age in years.

Range: 0..110

ELSE

**EINMMI**

"@/How many heart attacks (including myocardial infarction or coronary thrombosis), if any, did [^deceased ELSA respondent's name] have in the last 12 months according to a doctor?"

0 None

1 1

2 2

3 3 or more

END FILTER

END FILTER

If deceased was told by the doctor they had congestive heart failure [EiDiaA=4]

**EIAGC**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had congestive heart failure?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

If deceased was told by the doctor they had a heart murmur [EiDiaA=5]

**EIAGK**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had a heart murmur?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGK2**

Did [^deceased ELSA respondent's name] have a heart murmur during the last 12 months of [^his/her] life?

- 1 Yes
- 2 No

END FILTER

*If deceased was told by the doctor they had an abnormal heart rhythm [EiDiaA=6]*

**EIAGL**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had an abnormal heart rhythm?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGL2**

Did [^deceased ELSA respondent's name] have an abnormal heart rhythm during the last 12 months of [^his/her] life?

- 1 Yes
- 2 No

END FILTER

*If deceased was told by the doctor they had diabetes or high blood sugar [EiDiaA=7]*

**EIAGD**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had diabetes or high blood sugar?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGDI**

Did [^deceased ELSA respondent's name] inject insulin for diabetes during the last 12 months of [^his/her] life?

- 1 Yes
- 2 No

**EIMDB**

Did [^deceased ELSA respondent's name] take any tablets, pills or other medicines for diabetes during the last 12 months of [^his/her] life?

- 1 Yes
- 2 No

END FILTER

*If deceased was told by the doctor they had had a stroke [(EiDiaA=8) OR (EiCaSt = Yes)]*

**EIAGM**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had had a stroke?

INTERVIEWER: Enter the age in years.

Range: 0..110

|| ELSE  
|| **EINMST**  
|| How many strokes, if any, did [^deceased ELSA respondent's name] have in the last 12 months according to a doctor?"  
|| 0  
|| 1  
|| 2  
|| 3 3 or more  
||  
| END FILTER  
END FILTER

*If deceased was told by the doctor they had high cholesterol [EiDiaA=9]*

| **EiCYR**  
| Did [^deceased ELSA respondent's name] have high cholesterol during the last 12 months [^his/her] life?"  
| 1 Yes  
| 2 No

**EiMDC**  
Was [^deceased ELSA respondent's name] taking medication to lower [^his/her] cholesterol level during the last 12 months of [^his/her] life?"  
1 Yes  
2 No  
END FILTER

*IF deceased was told by the doctor they had other condition [EiDiaA=95 (other)]*

**EIAGN**  
Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had [^name of other condition from EiDix]?  
INTERVIEWER: Enter the age in years.  
Range: 0..110

**EIAGN2**  
Did [^deceased ELSA respondent's name] have [^name of other condition from EiDix] during the last 12 months of [^his/her] life?  
1 Yes  
2 No

END FILTER

## ***Chronic conditions***

*IF Cancer was the main cause of death [QScenario.EiCaus = 1]*

**EICACA**  
You told me earlier that [^deceased ELSA respondent's name] died of cancer. Did a doctor ever tell [^him/her] that [^he/she] had cancer?  
1 Yes  
2 No

| 3 Don't know

END FILTER

### EIDIAB

**[Multiple responses to EIDIAB are recorded in variables EIDIAB1 to EIDIAB10, EIDIAB96]**

SHOW CARD EI8

[^ And apart from this do\ Do] you know if [^deceased ELSA respondent's name] was ever told by a doctor that [^he/she] had any [^other] of the conditions on this card?

INTERVIEWER PROBE - 'What others?'...CODE ALL THAT APPLY. [Add1]

01 Chronic lung disease such as chronic bronchitis or emphysema

02 Asthma

03 Arthritis (including osteoarthritis , or rheumatism)

04 Osteoporosis, sometimes called thin or brittle bones

05 Cancer or a malignant tumour (excluding minor skin cancers)

06 Parkinson's disease

07 Any emotional, nervous or psychiatric problems

08 Alzheimer's disease

09 Dementia, organic brain syndrome, senility or any other serious memory impairment

10 Malignant blood disorder, e.g. Leukaemia

96 None of these

*IF deceased was told by the doctor they had Chronic lung disease [EiDiaB=1]*

### EILNG

Was [^deceased ELSA respondent's name] taking medication or other treatment for [^his/her] lung condition during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

*IF deceased was told by the doctor they had Asthma [EiDiaB=2]*

### EIAMA

Was [^deceased ELSA respondent's name] taking medication or other treatment for [^his/her] asthma during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

*IF deceased was told by the doctor they had Arthritis [EiDiaB=3]*

### EIART

**[Multiple responses to EIART are recorded in variables EIART1 to EIART4]**

Do you know which type or types of arthritis [^deceased ELSA respondent's name] had? Was it ...READ OUT...

CODE ALL THAT APPLY.

1 Osteoarthritis?

2 Rheumatoid arthritis?

3 Some other kind of arthritis?

4 Don't know

**EIAGF**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had arthritis?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*IF deceased was told by the doctor they had Cancer [(EiDiaB=5) OR (EiCaCa = Yes)]*

**EIAGG**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had cancer or a malignant tumour?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EICANA**

SHOW CARD EI9

In which organ or part of [^his/her] body did the cancer or tumour start? CODE ONE

ONLY

- 1 Lung
- 2 Breast
- 3 Colon, bowel or rectum
- 4 Lymphoma
- 5 Leukaemia
- 6 Melanoma or other skin cancer
- 95 Somewhere else

*IF cancer started somewhere else [EICANA= 95 (somewhere else)]*

**EiCanO @**

| INTERVIEWER: Record where cancer or tumour started."

| : STRING[100]

END FILTER

**EiCanM**

Had [^deceased ELSA respondent's name] received any treatment for [^his/her] cancer or malignant tumour in the last 12 months of [^his/her] life?"

1 Yes

2 No

*IF deceased was told by the doctor they had Parkinson's disease [EiDiaB=6]*

**EIPRK**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had Parkinson's disease?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*IF deceased was told by the doctor they had emotional, nervous or psychiatric problems [EiDiaB=7]*

**EIAGH**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had emotional, nervous or psychiatric problems?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIPSY**

*[Multiple responses to EIPSY are recorded in variables EIPSY1 to EIPSY8, EIPSY95]*

SHOW CARD EI10

What type of emotional, nervous or psychiatric problems did [^he/she] have? PROBE:

What others? CODE ALL THAT APPLY.

- 1 Hallucinations
- 2 Anxiety
- 3 Depression
- 4 Emotional problems
- 5 Schizophrenia
- 6 Psychosis
- 7 Mood swings
- 8 Bipolar disease (manic depression)
- 95 Something else

ELSE

**EIYRC**

Did [^he/she] have these problems during the last 12 months of [^his/her] life?

- 1 Yes
- 2 No

END FILTER|

END FILTER

*IF deceased was told by the doctor they had Alzheimer's disease [EiDiaB=8]*

**EIAGI**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had Alzheimer's Disease?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*IF deceased was told by the doctor they had dementia, senility or any other serious memory impairment [EiDiaB=9]*

**EIAGJ**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had dementia, senility or any other serious memory impairment?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*IF deceased was told by the doctor they a malignant blood disorder [EiDiaB=10]*

**EILEUK**

Did [<sup>^</sup>deceased ELSA respondent's name] have any of the following blood disorders...  
CODE ALL THAT APPLY

- 1 Leukaemia,
- 2 Lymphoma,
- 3 Other

*IF deceased had Leukaemia or Lymphoma [EiLeuk=1 or 2]*

**EIAGK**

Approximately how old was [<sup>^</sup>deceased ELSA respondent's name] first told by a doctor that [<sup>^</sup>he/she] had leukaemia or lymphoma?

INTERVIEWER: Enter age in years."

Range : 0..110

END FILTER

END FILTER

**EIAGO**

Did [<sup>^</sup>he/she] have any other major illnesses in the year preceding [<sup>^</sup>his/her] death?

1 Yes (Please specify at next question)

2 No

3 Don't know

*IF Did have any other major il = Yes [EiAgo = Yes]*

**EIAGOA @**

INTERVIEWER: Write in any other major illnesses.

STRING 100

END FILTER

### ***Joint replacement and resurfacing***

**EIMEDINT @**

I would now like to ask you about any joint replacement or resurfacing [<sup>^</sup>deceased ELSA respondent's name] may have had.

1 Continue

**EIMEDA**

Did [<sup>^</sup>he/she] ever have a joint replacement or resurfacing?

1 Yes

2 No

3 Don't know

*IF deceased ever had a joint replacement or resurfacing [EiMedA = Yes]*

**EIJIAA**

Did [<sup>^</sup>he/she] ever have a joint replacement or resurfacing in the last year before <sup>^</sup>heshe died?"

1 Yes

2 No

3 Don't know

**EIMEDN**

How many such joints did [^he/she] have replaced or resurfaced?

Range: 1..10

*[If responded to question about number of joints /EiMedN = RESPONSE]*

LOOP FOR Idx:= 1 TO EiMedN

**EIMEDB**

***[Loop: Responses to EIMEDB are recorded in variables EIMEDBZ1 to EIMEDBZ3, EIMEDBZ9, EIMEDBZ10]***

Which was the [^first\second etc] joint [^he/she] had replaced or resurfaced?

STRING 50

**EIMEDC**

***[Loop: Responses to EIMEDC are recorded in variables EIMEDC01 to EIMEDC11]***

In what year was the [^ joint mentioned at EiMedB] replaced or resurfaced?

INTERVIEWER: Specify the year.

Range: 1900..2900

**EIMEDCA**

***[Loop: Responses to EIMEDCA are recorded in variables EIMEDC01 to EIMEDC9]***

Was the [^ joint mentioned at EiMedB] replaced or resurfaced during [^his/her] last year of life?

1 Yes

2 No

3 Don't know

END FILTER

END FILTER

END FILTER

## ***Health care decisions***

**EIHDT**

Now we wish to ask some questions about healthcare decisions toward the end of [^deceased ELSA respondent's name] 's life.

Did [^deceased ELSA respondent's name] ever discuss with anyone the care or medical treatment they would want to receive if they were to become seriously ill?"

**EIHIT**

Did [^deceased ELSA respondent's name] provide written instructions about the treatment or care [^he/she] wanted to receive during the final days of [^his/her] life, sometimes called a Living Will, Advance Decision or Advanced Directive?

1 Yes

2 No

8 Don't Know

9 Refused

*| IF deceased provided instructions [EIHIT=yes]*

**EIHIL**

| Did these instructions express a desire to limit care in certain situations?

- | 1 Yes
- | 2 No
- | 8 Don't Know
- | 9 Refused

**EIHLA**

| Did [^deceased ELSA respondent's name] (also) make any legal arrangements for a specific person or persons to make decisions about [^his/her] care or medical treatment if [^he/she] could not make those [^him/herself]? This is sometimes called a Lasting Power of Attorney.

- | 1 Yes
- | 2 No
- | 8 Don't Know
- | 9 Refused

*| IF deceased made legal arrangement for decisions (Lasting Power of Attorney) [EIHLA=yes]*

**EIHLN**

| Who had that authority, (that is, what was their relationship to [^deceased ELSA respondent's name])? CODE all that apply.

- | 1 Spouse/Partner
- | 2 Child/Child-In-Law/Grandchild
- | 3 Other relative
- | 4 Non-Relative proxy respondent
- | 5 Friend
- | 6 GP/Doctor/Healthcare Professional
- | 7 Minister/Rabbi/Imam/Priest/Religious Advisor
- | 8 Solicitor/Legal Professional
- | 9 Social worker
- | 10 Other(Specify)
- | 98 Don't Know/ Not Ascertained
- | 99Refusal

| END FILTER

END FILTER

## ***Financing medical care***

**EIEXPINT @**

I'd now like to ask you some questions about any expenses which [^deceased ELSA respondent's name] incurred as a result of the medical care [^he/she] received in the year before [^he/she] died. Before I do that, though, I'd like to assure you again that everything you have already told me and anything else you tell me will be kept completely confidential.

INTERVIEWER: Press and to continue.

Range: 1..1

**EIEXPS**

Did [^deceased ELSA respondent's name] receive any medical treatments other than on the NHS?

- 1 Yes
- 2 No
- 3 Don't know

*IF deceased receive any medical treatment other than NHS [EiExpS = Yes]*

**EIPHI**

Were any of the costs of these medical treatments covered by private health insurance?

- 1 Yes, all of the cost
- 2 Yes, some of the cost
- 3 No, none of the cost
- 4 No costs
- 5 Don't know

*IF some or none of the costs covered by insurance [EiPHI=2 or 3]*

**EIFHLP**

Other than insurances did [^deceased ELSA respondent's name] receive any financial help to pay for any of these medical treatments?

- 1 Yes
- 2 No
- 3 Don't know

*IF receive any financial help = Yes [EiHlp = Yes]*

**EIFWHO**

**[Multiple responses to EIFWHO are recorded in variables EIFWHO1 to EIFWHO3]**

Who else did [^deceased ELSA respondent's name] receive financial help from? CODE ALL THAT APPLY.

- 1 Child
- 2 Other relative
- 95 Other (please specify at next question)
- 96 Don't know

*IF receive financial help from other [EiFWho=95 (other)]*

**EIFWHOA @**

INTERVIEWER: Record who [^deceased ELSA respondent's name] received financial help from.  
STRING 150

END FILTER

**EITOTL @@**

How much money in total did [^deceased ELSA respondent's name] receive from others to pay for these treatments?

INTERVIEWER: Enter amount to the nearest £.

Range: 0..9999997

*IF NONRESPONSE in How much money in total [EiTотl = NONRESPONSE]*

**EiTотlB**

Was it.....  
BRACKETS (250, 1000, 5000, 10000)  
[Bracket results are recorded in EiTol, EiTou, EiToe, EiTol]  
END FILTER

**EIFAMT @@**  
How much did [^deceased ELSA respondent's name][^and you/his/her spouse or partner] pay for the treatment [^themselves/ yourselves]?

INTERVIEWER: Enter amount to the nearest £.  
Range: 0..9999997

*IF NON-RESPONSE in How much paid for the treatment [EiFAmt = NONRESPONSE]*

**EiFAmtB**  
Was it.....  
BRACKETS (250, 1000, 5000, 10000)  
[Bracket results are recorded in EiFAI, EiFAu, EiFAe, EiFAr]

*IF amount paid for treatment was [(EiFAmt > 0) OR (EiFAmtB.RESLT = 1)]*

**EIHPAY**

*[Multiple responses to EIHPAY are recorded in variables EIHPAY1 to EIHPAY3, EIHPAY95, EIHPAY96]*

How were these costs financed? CODE ALL THAT APPLY

- 1 Paid using savings/earnings
- 2 Took out a loan
- 3 Have not yet paid
- 95 Other (specify)
- 96 Don't know

*IF Costs were financed an other way [EiHPay= 95 (other)]*

**EIHPAYO @**

INTERVIEWER: Write in how the costs are financed.

STRING 80

END FILTER

END FILTER

END FILTER

END FILTER

## ***Financing the funeral***

**EIFUN @**

I asked you earlier about expenses incurred for the health care that [^deceased ELSA respondent's name] received.

Now I would like to ask you about expenses which were associated with [^his/her] funeral, or legal fees related to [^his/her] death.

INTERVIEWER: Press and to continue.

Range: 1..1

**EIDCSTB**

Did [^deceased ELSA respondent's name] have an insurance policy specifically designed to cover [^his/her] funeral expenses?

- 1 Yes, covered it partially
- 2 Yes, covered it totally
- 3 No

*IF had an insurance policy [EiDcstb=1 or 2]*

**EIFUINS @ (see DVEIFUINS grouped for non-disclosure)**

INTERVIEWER: if the insurance is not paid out yet, record the expected amount to be paid out.

In total, how much did this insurance pay out?

Range: 0..999997

END FILTER

*IF had no insurance or partial insurance policy [EiDcstb= 2 or 3]*

**EIDCSTA** @ (see DVEIDCSTA grouped for non-disclosure)

What was the total cost of the funeral expenses and legal fees[^after the insurance payment]?

Range: 0..999997

### **EIFUNREL**

*[Multiple responses to EIFUNREL are recorded in variables EIFUNR01 to EIFUNR23 and EIFUNR47 to EIFUNR51 for answers backcoded from other EIRRELOT ]*

SHOW CARD EI11

Who [^else] paid for the funeral expenses (that is what is their relationship to [^deceased ELSA respondent's name])? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative or other non-relative paid [EiFunRel= 22 or 23]*

**EIRRELOT** @ (answers backcoded into EIFUNR47 to EIFUNR51)

INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to

[^deceased ELSA respondent's name].  
STRING 100

END FILTER

*IF respondent paid towards funeral expenses [(EiFunRel=1) AND (EiFunRel.CARDINAL >= 2)]*

**EITOTRES** @ (see DVEITOTRES grouped for non-disclosure)

In total, how much did you pay towards [^deceased ELSA respondent's name]'s funeral expenses?

Range: 0..999997

END FILTER

*IF husband or wife paid towards funeral expenses [(EiFunRel=2) AND (EiFunRel.CARDINAL >= 2)]*

**EITOTSPS @@**

In total, how much did the husband/wife pay towards [^deceased ELSA respondent's name]'s funeral expenses?

Range: 0..999997

END FILTER

*IF partner or cohabitee paid towards funeral expenses [(EiFunRel=3) AND (EiFunRel.CARDINAL >= 2)]*

**EITOTPRT @@**

In total, how much did the partner/cohabitee pay towards [^deceased ELSA respondent's name]'s funeral expenses?

Range: 0..999997

END FILTER

LOOP FOR idy:= 4 TO 23

*Loop for each relative from EIFUNREL [EiFunRel=4..21]*

**EIFUNUM**

***[Loop: Responses to EIFUNUM are recorded in variables EIFUNU04 to EIFUNU23]***

How many [^relatives from EIFUNREL] paid towards the funeral expenses?

INTERVIEWER: If same relationship, do not include respondent here.

Range: 1..20

*IFEIENUM answered [Eifunum = RESPONSE and >1]*

**EITOTREL @** (See DVEITOTR01 and DVEITOTR02 for first and second son or daughter grouped for non-disclosure. Data for other relatives are not included owing to small numbers)

***[Loop: Responses to EITOTREL are recorded in variables EITOTR04 to EITOTR23]***

In total, how much did the [^first\second etc] [^relative from EIFUNREL] pay towards the funeral expenses?

INTERVIEWER: Enter amount in pounds.

Range: 1..999997

END FILTER

END FILTER

END FILTER

END FILTER

| | END FILTER

| | END FILTER

## **Work and pensions**

### **EIWORINT @**

Now I'd like to ask you some questions about [^deceased ELSA respondent's name]'s employment situation since we last spoke to [^him/her].

1 Continue

### **EIWORKA**

Did [^deceased ELSA respondent's name] do any paid work in the time since we last interviewed [^him/her] on [^date of deceased ELSA respondent's last interview].

- 1 Yes - Full time
- 2 Yes - part time
- 3 Yes - from time to time
- 4 No
- 5 Don't know

*/F deceased did paid work from time to time since last interview [EiWorkA = 3]*

### **EIWHNTM**

When was the last time [^deceased ELSA respondent's name] worked?

INTERVIEWER: Enter month.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

### **EIWHNTY**

(When was the last time [^deceased ELSA respondent's name] worked?)

INTERVIEWER: Enter year.

Range: 2002..2900

### **ELSE**

| | *IF did paid work since the last interview [EiWorkA = 1 or 2]*

### **EISTOP**

| | Had [^deceased ELSA respondent's name] stopped working before [^his/her] death?

- 1 Yes
- 2 No

| | | *IF Had stopped working before death [EiStop = Yes]*

**EIWHEN**

In what month and year did [^he/she] stop working?

INTERVIEWER: Enter month.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**EIWHENY**

INTERVIEWER: Enter year.

Range: 1900..2050

**EIWHY**

***[Multiple responses to EIWHY are recorded in variables EIWHY01 to EIWHY15, EIWHY95]***

SHOW CARD EI12

Why did [^he/she] stop working?

INTERVIEWER: Code all that apply.

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 15 Retired
- 95 Other reason

| | | *IF stopped for other reason [EiWhy=95 (other)]*

**EIWHYOTH @**

What was the reason?

INTERVIEWER: Write in.

STRING 200

```
    |  
    || END FILTER  
    ||  
    || END FILTER  
    ||  
    || END FILTER  
||  
END FILTER
```

**EIPENM**

Was [^he/she] a member of a private pension plan, including employer provided, personal, stakeholder, or any other scheme?

- 1 Yes
- 2 No
- 3 Don't know

*IF member of a private plan [EiPenM = Yes]*

**EIPENN**

How many pension funds did [^deceased ELSA respondent's name] have?

Range: 1..8

*IF response to number of pension funds [EiPenN = RESPONSE]*

**EIPTYPE**

***[Loop: Responses to EIPTYPE are recorded in variables EIPTYP1 to EIPTYP8]***

SHOW CARD EI13

What type of pension scheme was this [^first\second etc] scheme?

- 1 Employer provided (occupational) scheme
- 2 Private Personal pension scheme
- 3 Group Personal pension
- 4 Stakeholder pension
- 5 S226 plan
- 6 Retirement Annuity pension (pre 86 PPPs)
- 7 SIPP (Self invested Personal Pension)
- 8 National Employment Savings Trust
- 9 other retirement saving scheme

*IF employer provided scheme [EiPType = 1]*

**EIEMP @**

What is the name of the employer provided scheme?

INTERVIEWER: If police, local authority etc, probe for name of force/local authority etc. WRITE

IN.

STRING 80

END FILTER

**EIPEN**

*[Loop and multiple responses: Responses to EIPEN are recorded in variables EIPEN1 to EIPEN5, EIPEN95, EIPEN96 for Loop 1; EIPEN6 to EIPEN10, EIPEN97, EIPEN98 for Loop 2; EIPEN11 to EIPEN15, EIPEN99, EIPEN100 for Loop 3; EIPEN16 to EIPEN20, EIPEN102, EIPEN103 for Loop 4]*

When [^he/she] died, what happened to [^his/her] [^ pension type from EiPType]? ...READ OUT...  
CODE ALL THAT APPLY.

- 1 Someone is receiving regular payments
- 2 Someone received a lump sum payment
- 3 Someone expects to receive regular payments in the future
- 4 Someone expects to receive a lump sum payment in the future
- 5 Payments were lost
- 95 Other (specify at next question)
- 96 Don't know

*IF other happened to pension scheme [EiPen=95 (other)]*

**EIPENO @**

*[Loop: Responses to EIPENO are recorded in variables EIPENO1 to EIPENO8]*

INTERVIEWER: Enter details.

STRING 100

END FILTER

*IF Now IN EiPen OR Received IN EiPen OR ExpectP IN EiPen OR ExpectL*

*/ / / IN EiPen [((Now IN EiPen) OR (Received IN EiPen)) OR (ExpectP IN EiPen)) OR*

*(ExpectL IN EiPen)]*

**EIPENWHO**

*[Loop: Responses to EIPENWHO are recorded in variables EIPENWho to EIPENWh2..8]*

SHOW CARD EI14

Who is receiving or expects to receive payments?

INTERVIEWER: Code one only. If respondent is son or daughter code 'Respondent', and not son/daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister

- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative expects to receive payments [EiPenWho = 22]*

**EIPENWR @**

INTERVIEWER: Please specify the other relative.  
STRING 80

ELSE

*IF other non-relative expects to receive payments [EiPenWho = 23]*

**EIPENWN @**

INTERVIEWER: Please specify the other non-relative.  
STRING 80

END FILTER

END FILTER

*IF expect to receive regular payments in future [ElPen =3]*

**EIPENXPM**

***[Loop: Responses to EIPENXPM are recorded in variables EIPENXPM1 to EIPENXP1..8]***

In what month and year do [^you/they] expect to start receiving these regular payments?

INTERVIEWER: Enter month.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**EIPENXPY**

***[Loop: Responses to EIPENXPY are recorded in variables EIPENXPY1 to EIPENXPY8]***

INTERVIEWER: Enter year.

Range: 2002..2900

**EIPENXPA @@**

**[Loop: Responses to EIPENXPA are recorded in variables EIPENXPA1 to EIPENXPA4]**

How much do [^you/they] expect to receive per month?

Range: 0..999997

*IF EiPenxpa not answered [EiPenxpa = NONRESPONSE]*

EiPenxpB

Is it.....

BRACKETS (250, 500, 1000, 2500)

[Loop: Bracket results are recorded in EiPexpl1 to EiPexpl4, EiPexpu1 to EiPexpu4 , EiPexpe1 to EiPexpe4, EiPexpr1 to EiPexpr4]

END FILTER

END FILTER

*IF expect to receive lumpsum in future [ElPen =4]*

**EIPENXLM**

**[Loop: Responses to EIPENXLM are recorded in variables EIPENXLM1 to EIPENXLM4]**

In what month and year do [^you/they] expect to receive the lump sum?

INTERVIEWER: Enter month.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**EIPENXLY**

**[Loop: Responses to EIPENXLY are recorded in variables EIPENXLY1 to EIPENXLY8]**

INTERVIEWER: Enter year.

Range: 2002..2900

**EIPENXLA**

**[Loop: Responses to EIPENXLA are recorded in variables EIPENX1 to EIPENX4]**

How much do [^you/they] expect the lump sum to amount to?

Range: 0..999997

*IF EiPenxla = NONRESPONSE [EiPenxla = NONRESPONSE]*

EiPenxlB

Is it.....

BRACKETS (5000, 10000, 50000, 100000)

[Loop: Bracket results are recorded in EiPexpl1 to EiPexpl4, EiPexlu1 to EiPexlu4 , EiPexle1

to EiPexle4, EiPexlr1 to EiPexlr4]

END FILTER

END FILTER

*IF someone is receiving regular payments [EiPen=1]*

#### **EIPENPD**

**[Loop: Responses to EIPENPD are recorded in variables EIPENPD1 to EIPENP4]**

Thinking about the last regular payment [^you/they] received, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (Explain in a note)

#### **EIPENPA**

**[Loop: Responses to EIPENPA are recorded in variables EIPENPA1 to EIPENPA4]**

How much did [^you/they] receive?

Range: 0..99997

*IF amount not given but period was given [EiPenpA = NONRESPONSE AND (EiPenPd = RESPONSE)]*

*IF EiPenPd IN [OneWeek .. ThrWeek] [EiPenPd IN [OneWeek ..  
/ / / / / ThrWeek]]*

#### **EiPenpW**

Was it.....

BRACKETS (50, 100, 250, 500)

[Loop: Bracket results are recorded in EiPerwl1 to EiPerwl4 , EiPerwu1 to EiPerwu4 , EiPerwe1 to EiPerwe4, EiPerwr1 to EiPerwr4]

ELSE

*IF EiPenPd IN [Fourweek .. OneYear] [EiPenPd IN [Fourweek ..  
/ / / / / OneYear]]*

#### **EiPenpM**

Was it.....

BRACKETS (250, 500, 1000, 2500)

```

| | | | [Bracket results are recorded in EiPerml1 to EiPerml4 , EiPermu1 to EiPermu4 ,
| | | | EiPerme1 to EiPerme4, EiPermr1 to EiPermr4]

| | | ELSE (IF less than one week or one off lump sum or none of these periods)

| | | EiPenpO
| | | Was it.....
| | | BRACKETS (250, 500, 1000, 2500)
| | | [Bracket results are recorded in EiPerol1 to EiPerol4 , EiPerou1 to EiPerou4 ,
| | | EiPeroe1 to EiPeroe4, EiPeror1 to EiPeror4]
| |
| | | END FILTER

If someone received lump sum [EiPen=2]

EIPENLA @@
[Loop: Responses to EIPENLA are recorded in variables EIPENL1 to EIPENL8]
Thinking about the lump sum payment [^you/they] received, how much was this?
Range: 0..999997

If amount not given [EiPenla = NONRESPONSE]

EiPenlb
Was it.....
BRACKETS (5000, 10000, 50000, 100000)
[Bracket results are recorded in EiPerll1 to EiPerll4 , EiPerlu1 to EiPerlu4 ,
| | EiPerle1 to EiPerle4, EiPerlr1 to EiPerlr4]

| | | END FILTER

```

## **Assets and inheritances**

### **EIASINT @**

I would now like to ask you some questions about what happened to [^deceased ELSA respondent's name]'s assets after [^his/her] death.

1 Continue

### **EIASCK**

Can I just check, has [^deceased ELSA respondent's name]'s estate been distributed yet?"

1 Yes

2 No

*If estate has been distributed [EIASCK=yes]*

### **EIWILLA**

Did [^deceased ELSA respondent's name] have a Will?

1 Yes

2 No

3 Don't know

*IF did not have a will or does not know [EiWillA=no or don't know]*

### **EIKIN**

SHOW CARD EI14

Who was [^deceased ELSA respondent's name]'s next of kin?

INTERVIEWER: Code one only. If respondent is son or daughter code 'Respondent', and not son/daughter. Only code 'Son' or 'Daughter' for those other than respondent.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

*IF next of kin was other relative or other non-relative [EiKin =22 or 23]]*

```

| | | EIKINO @
| | | INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to
| | | [^deceased ELSA respondent's name].
| | | STRING 100
| | |
| | | END FILTER
| |
| | | ELSE
| |
| | | IF had a Will [EiWillA = Yes]
| |
| | | EIEXEC
| | | Are you the legal executor of the Will?
| | | 1 Yes
| | | 2 No
| | | 3 Don't know
| |
| | | EIBEN
| | | Are you a beneficiary of the Will?
| | | 1 Yes
| | | 2 No
| | | 3 Don't know
| | | 4 SPONTANEOUS - Assets not yet been shared out
| |
| | | EIPROB
| | | Did/Does [^deceased ELSA respondent's name]'s Will need to go to probate?
| | | 1 Yes
| | | 2 No
| | | 3 Don't know
| |
| | | IF will needed to go to probate [EiProb = Yes]
| |
| | | EIWILLB
| | | Has [^his/her] Will been through probate?
| | | 1 Yes
| | | 2 No
| | | 3 Don't know
| |
| | | IF will has not been through probate [EiWillB = No]
| |
| | | EIWILLPRO @@
| | | What is the total value of [^deceased ELSA respondent's name]'s assets?
| | | Range: 1..999997
| |
| | | END FILTER

```

**EIHOME**

Did [^deceased ELSA respondent's name] own [^his/her] main home or share of [^his/her] main home when [^he/she] died? By main home I mean the place where [^he/she] lived most of the time (before they moved into an institution).

INTERVIEWER: Other properties [^he/she] may have owned will be covered later.

1 Yes

2 No

*IF owned main home or share [EiHome = Yes]*

*| | IF respondent is husband or wife or partner of deceased or spouse of deceased is still alive  
[(EiRRel =1 or 2) or (SurvSp = Yes)]*

**EISP**

Did [^you/ their spouse/partner] inherit the home or [^deceased ELSA respondent's name]'s share of the home?

1 Yes

2 No

*IF respondent/ spouse did not inherit the home or share of home [EiSp = No]*

**EISPOWN**

[^Do you/ Does their spouse/partner] currently own a share of the home?

1 Yes

2 No

*IF currently own a share of the home [EiSpOwn = Yes]*

**EISPSH**

What share of the home [^do/does you/ their spouse/partner] currently own?

INTERVIEWER: Code how question will be answered

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share expressed as percentage [EiSpSh = 1]*

**EISPP**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share expressed as fraction [EiSpSh = 2]*

**EISPF @@**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share expressed as an amount [EiSpSh =3]*

**EISPA**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF did inherit the home or share of the home [EiSp = Yes]*

**EISPINH**

Did [^you/their spouse/partner] inherit the home (or [^deceased ELSA respondent's name]'s share of the home) solely or jointly with some other people?

- 1 Solely inherited
- 2 Jointly inherited

END FILTER

*IF did inherit the home jointly [EiSpInH = 2]*

**EISHARE**

What share of the home did [^deceased ELSA respondent's name] own?

INTERVIEWER: Code how question will be answered

- 1 As a percentage
- 2 As a fraction
- 3 As a monetary amount

*IF deceased's share expressed as a percentage [EiShare = 1]*

**EISHP**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF deceased's share expressed as a fraction [EiShare = 2]*

**EISHF @@**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF deceased's share expressed as an amount [EiShare = 3]*

**EISHA**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

*IF did not inherit home or inherited jointly [(EiSp = No) OR (EiSplnH = 2)]*

**EIHOWH**

**[Multiple responses to EIHOWH are recorded in variables EIHOWH01 to EIHOWH23]**

SHOW CARD EI14

[^Who inherited the home/ deceased ELSA respondent's name share] (that is, what is their relationship to [^deceased ELSA respondent's name])?

CODE ALL THAT APPLY

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative inherited home/ share of home [EiHowH=22]*

**EIHOWOR @**

INTERVIEWER: Please specify the other relative.  
STRING 60  
END FILTER

*IF other non-relative inherited home/ share of home [EiHowH=23]*

**EIHOWON @**

INTERVIEWER: Please specify the other non-relative.  
STRING 60

END FILTER

*IF SHOW CARD E14 (that is, wh = RESPONSE [EiHowH =  
RESPONSE])*

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomSp.idy IN EiHowH [idy IN EiHowH]*

**EIHOWN**

***[Loop: Responses to EIHOWN are recorded in variables EIOWN01 to EIOWN23]***

How many [^type of relative from EIHOWH] are you referring to?

INTERVIEWER: If same relationship, do not include respondent here.

Range: 1..20

END FILTER

END FILTER

END FILTER

*IF only one answer coded at EIHOWH (EiHowN[EiHowH[1].ORD] = 1)*

*IF not husband/ wife or partner who inherited the home [EiHowH<>2 and EiHowH<>3]*

**EIHOLIV**

INTERVIEWER ASK OR CODE: Does this person live in this home at present?

- 1 Yes
- 2 No

END FILTER

ELSE (i.e. more than one type of relative coded at EIHOWH)

**EiHoLv**

Do any of these people currently live in that home?

- 1 Yes
- 2 No

*IF any of these people currently live in that home [EiHoLv = Yes]*

### **EIHOLW**

**[Multiple responses to EIHOLW are recorded in variables EIHOLW01 to EIHOLW23]**

SHOW CARD EI14

Who lives in the house at present? CODE ALL THAT APPLY.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

END FILTER

END FILTER

END FILTER

### **EISPLIVE**

INTERVIEWER ASK OR CODE: Does [^deceased ELSA respondent's name]'s spouse/partner live in that home at present?

- 1 Yes
- 2 No

*IF no one lives in the house [((EiHoLiv <> Yes) AND (EiHoLv <> Yes)) AND (EiSpLive <> Yes)]*

**EIHOSLD** (see also EIHOSZ for backcoded answers)

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to that home [EiHoSId = 95 (Other)]*

**EIHOSOTH @**

INTERVIEWER: Record what has happened to the home.  
STRING 100

END FILTER

END FILTER

**EIHOA @** (see DVEIHOA grouped for non-disclosure)

What [<sup>^</sup>was/is] the [<sup>^</sup>value/selling price] of that home?

Range: 1..9999997

*IF no answer to value question [EiHoa = NONRESPONSE]*

**EiHoab**

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EiHol, EiHou, EiHoe, EiHor]

END FILTER

**EIHOMG**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

1 Yes

2 No

*IF there was outstanding mortgage [EiHoMg = Yes]*

**EIHOMGI**

Did [<sup>^</sup>deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

1 Yes, In full

2 Yes, partially

3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EiHoMgl=2 or 3]*

**EIHOMGA**

How much was the outstanding balance on this mortgage [<sup>^</sup>after the insurance policy pay out]?

Range: 1..9999997

*IF no answer to the outstanding balance [EiHoMga = NONRESPONSE]*

**EiHoMgab**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EiHobl, EiHobu, EiHobe, EiHobr]

END FILTER

END FILTER

END FILTER

ELSE

**EIJOINT**

Did [^deceased ELSA respondent's name] own this home jointly with someone else?

1 Yes

2 No

*IF deceased owned home jointly [EiJoint = Yes]*

**EIOTHO**

**[Multiple responses to EIOTHO are recorded in variables EIOTHO01 to EIOTHO23]**

Who else owned the house with [^deceased ELSA respondent's name] when [^he/she] died?

INTERVIEWER: CODE ALL THAT APPLY INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF who else owned the house with deceased was answered [EiOthO = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomNo.idy IN EiOthO [idy IN EiOthO]*

**EIOTHN**

**[Loop: Responses to EIOTHN are recorded in variables EIOTHN01 to EIOTHN23]**

How many [^type of relative from EIOTHO] are you referring to?  
Range: 1..20

END FILTER

END FILTER

END FILTER

**EIOSHARE**

What share of the house did [^deceased ELSA respondent's name] own?

- 1 As a percentage
- 2 As a fraction
- 3 As a monetary amount

*If share of house expressed as a percentage [EiOShare = 1]*

**EIOSHP**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*If share of house expressed as a fraction [EiOShare = 2]*

**EIOSHF @@**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*If share of house expressed as an amount [EiOShare = 3]*

**EIOSHA**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

**EIOIN**

Did only those with joint ownership inherit [^deceased ELSA respondent's name]'s share of the house?

- 1 Yes
- 2 No
- 3 Don't know

*IF it was not only those with joint ownership who inherited deceased's share [EioIn = No]*

**EIOINW**

**[Multiple responses to EIOINW are recorded in variables EIOINW01 to EIOINW23]**

Who else inherited [^deceased ELSA respondent's name]'s share of the home?

INTERVIEWER: DO NOT CODE JOINT OWNERS AGAIN INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomNo.idy IN EioInW [idy IN EioInW]*

**EIOINN**

**[Loop: Responses to EIOINN are recorded in variables EIOINN01 to EIOINN23]**

How many [^type of relative at EIOINW] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

*ELSE (i.e. IF house was not jointly owned)*

**EioHwH**

SHOW CARD EI14

Who inherited this home (that is, what is their relationship to  
[^deceased ELSA respondent's name]?)

CODE ALL THAT APPLY

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF who inherited the home was answered [EioHwH = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomNo.idy IN EioHwH [idy IN EioHwH]*

**EIOHWN**

***[Loop: Responses to EIOHWN are recorded in variables EIOHWN01 to EIOHWN23]***

How many [^type of relative at EIOHWH] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

END FILTER

*IF only one type of relative mentioned at EioHwH*  
[(((EiOthO.CARDINAL = 1) AND (EiOthN[EiOthO[1].ORD] = 1)) AND (EiOlN = Yes)) OR ((EioHwH.CARDINAL = 1) AND (EioHwN[EioHwH[1].ORD] = 1))]

#### EIOHLIV

INTERVIEWER: ASK OR CODE: Does this person live in the home at present?

- 1 Yes
- 2 No

ELSE (i.e. more than one relative mentioned at EIHHWH)

#### EioHLv

Do any of these people who now own the property currently live in that home?

- 1 Yes
- 2 No

*IF any who now own the property currently live in that home [EioHLv = Yes]*

#### EIOHLW

**[Multiple responses to EIOHLW are recorded in variables EIOHLW01 to EIOHLW23]**

Who lives in the house at present? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

ELSE

*IF none of owners live in home [EioHLv = No]*

**EIOHSLD**

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to the home [EioHSId = 95 (Other)]*

**EIOHSO @**

INTERVIEWER: Record what has happened to the home.

STRING 100

END FILTER

END FILTER

END FILTER

END FILTER

**EIOHA @ (see DVEIOHA grouped for non-disclosure)**

What [^is/was] the [^value/selling price] of that home?

Range: 1..9999997

*IF value of home not answered [EioHa = NONRESPONSE]*

**EioHab**

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EioHl, EioHu, EioHe, EioHr]

END FILTER

**EIOHMG**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

1 Yes

2 No

*IF there was outstanding mortgage [EioHMg = Yes]*

**EIOHMG1**

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

1 Yes, In full

2 Yes, partially

3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EioHMg1 =2 or 3]]*

**EIOHMGA**

How much was the outstanding balance on this mortgage [^after the insurance policy pay out]?  
Range: 1..9999997

*IF no response to outstanding balance [EioHMga = NONRESPONSE]*

**EioHMgab**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EioHbl, EioHbu, EioHbe, EioHbr]

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**EIPRP**

Did [^deceased ELSA respondent's name] own any property, or share of any property, other than their main home

when [^he/she] died? (Exclude business property and other non-residential property, include holiday homes and timeshares.)

1 Yes

2 No

*IF deceased owned property other than main home [EiPrp = Yes]*

**EIPRPN**

How many other properties did [^deceased ELSA respondent's name] own?

Range: 1..20

*IF number of properties answered [EiPrpN = RESPONSE]*

LOOP FOR idx:= 1 TO EiPrpN

*IF respondent is husband or wife or partner of deceased or spouse of deceased is still alive | | |  
[(EiRRel =1 or 2) or (SurvSp = Yes)]*

**EISP** (EISP2 for first other home)

***[Loop: Responses to EISP are recorded in variable EISP2 as maximum number of other properties was 1 so only one loop]***

Did [^you/ their spouse/partner inherit the [first] home or [^deceased ELSA respondent's name]'s share of the home?

1 Yes

2 No

*IF respondent or spouse/partner did not inherit the first other home [EiSp = No]*

**EISPOWN** (EISPOWN02 for first other home)

**[Loop: Responses to EISPOWN are recorded in variable EISPOW2 as maximum number of other properties was 1 so only one loop]**  
 [^Do you/ does their spouse/partner] currently own a share of the home?  
 1 Yes  
 2 No

*IF respondent or spouse partner owns share of the home [EiSpOwn = Yes]*

**EISPSH** (EISPSH2 for first other home)  
**[Loop: Responses to EISPSH are recorded in variable EISPSH2 as maximum number of other properties was 1 so only one loop]**  
 What share of the home [^do you/ does their spouse/partner] currently own?  
 INTERVIEWER: Code how question will be answered  
 1 As a percentage  
 2 As a fraction  
 3 As a monetary amount

*IF share of home expressed as a percentage [EiSpSh = 1]*

**EISPP** (EISPP2 for first other home)  
**[Loop: Responses to EISPP are recorded in variable EISPP2 as maximum number of other properties was 1 so only one loop]**  
 (What share of the home [^do you/does their spouse/partner] currently own?)  
 INTERVIEWER: Give the answer as a percentage.  
 Range: 1..100

**ELSE**

*IF share of home expressed as a fraction [EiSpSh = 2]*

**EISPF @**  
**[Loop: Responses to EISPF are recorded in variable EISPF2 as maximum number of other properties was 1 so only one loop]**  
 (What share of the home [^do you/does their spouse/partner] currently own?)  
 INTERVIEWER: Give the answer as a fraction.  
 STRING 15

**ELSE**

*IF share of home expressed as an amount [EiSpSh = 3]*

**EISPA** (EISPA2 for first other home)  
**[Loop: Responses to EISPA are recorded in variable EISPA2 as maximum number of other properties was 1 so only one loop]**  
 (What share of the home [^do you/does their spouse/partner] currently own?)  
 INTERVIEWER: Give the answer as an amount.  
 Range: 1..9999997

**END FILTER**

**END FILTER**

**END FILTER**

END FILTER

END FILTER

*IF respondent or spouse/partner inherited the first other home [EiSp = Yes]*

**EISPINH** (EISPINH2 for first other home)

**[Loop: Responses to EISPINH are recorded in variable EISPIN2 as maximum number of other properties was 1 so only one loop]**

Did [^you/their spouse/partner] inherit the home (or [^deceased ELSA respondent's name]'s share of the home) solely or jointly with some other people?

- 1 Solely inherited
- 2 Jointly inherited

END FILTER

*IF first other home inherited jointly [EiSplnH = 2]*

**EISHARE** (EISHARE2 for first other home)

**[Loop: Responses to EISHARE are recorded in variable EISHAR2 as maximum number of other properties was 1 so only one loop]**

What share of the home did [^deceased ELSA respondent's name] own?

INTERVIEWER: Code how question will be answered

- 1 As a percentage
- 2 As a fraction
- 3 As a monetary amount

*IF share of home expressed as a percentage [EiShare = 1]*

**EISHP** (EISHP2 for first other home)

**[Loop: Responses to EISHP are recorded in variables EISHP2 as maximum number of other properties was 1 so only one loop]**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share of home expressed as a fraction [EiShare = 2]*

**EISHF @**

**[Loop: Responses to EISHF are recorded in variables EISHF2 as maximum number of other properties was 1 so only one loop]**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

| | | | | *IF share of home expressed as an amount [EiShare = 3]*

| | | | | **EISHA** (EISHA2 for first other home)

| | | | | **[Loop: Responses to EISHA are recorded in variables EISHA2 as maximum number of other properties was 1 so only one loop]**

| | | | | (What share of the home did [^deceased ELSA respondent's name] own?)

| | | | | INTERVIEWER: Give the answer as an amount.

| | | | | Range: 1..9999997

| | | | | END FILTER

| | | | | *IF respondent/spouse/partner does not own all of home [(EiSp = No) OR (EiSpInH = 2)]*

| | | | | **EIHOWH** (EISHA39..61 for first other home)

| | | | | **[Multiple responses to EIHOWH are recorded in variables EIHOWH39 to EIHOWH61]**

| | | | | SHOW CARD EI14

| | | | | [^Who inherited this home/ deceased ELSA respondent's name's share] (that is, what is their relationship to [^deceased ELSA respondent's name])? CODE ALL

| | | | | THAT APPLY

| | | | | INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

| | | | | 01 Respondent (you)

| | | | | 02 Husband/Wife

| | | | | 03 Partner/cohabitee

| | | | | 04 Natural son/daughter

| | | | | 05 Adopted son/daughter

| | | | | 06 Foster son/daughter

| | | | | 07 Step-son/step-daughter/child of partner

| | | | | 08 Son-in-law/daughter-in-law

| | | | | 09 Natural parent

| | | | | 10 Adoptive parent

| | | | | 11 Foster parent

| | | | | 12 Step-parent/parent's partner

| | | | | 13 Parent-in-law

| | | | | 14 Natural brother/sister

| | | | | 15 Half-brother/sister

| | | | | 16 Step-brother/sister

| | | | | 17 Adopted brother/sister

| | | | | 18 Foster brother/sister

| | | | | 19 Brother-in-law/sister-in-law

| | | | | 20 Grandchild

| | | | | 21 Grandparent

| | | | | 22 Other relative (specify at next question)

| | | | | 23 Other non-relative (specify at next question)

| | | | | *IF other relative owns home/share [EiHowH=22]*

**EIHOWOR @**

INTERVIEWER: Please specify the other relative.  
STRING 60

END FILTER

*IF other non-relative owns home/share [EiHowH=23]*

**EIHOWON @**

INTERVIEWER: Please specify the other non-relative.  
STRING 60

END FILTER

*IF answer given to relationship of owner [EiHowH = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN EiHowH [idy IN EiHowH]*

**EIHOWN** (EIHOWN24 to 46 for first other home)

**[Loop: Responses to EIHOWN are recorded in variables EIHOWN24 to EIOWN46]**

How many [^type of relative from EIHOWH] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

*IF only one answer at EIHOWH*

*[(EiHowH.CARDINAL = 1) AND (EiHowN[EiHowH[1].ORD] = 1)]*

*IF first other home not owned by husband/wife/partner [EiHowH<>1 & EiHowH<>2]*

**EIHOLIV** (EIHOLIV2 for first other home)

**[Loop: Responses to EIHOLIV are recorded in variable EIHOLIV2 as maximum number of other properties was 1 so only one loop]**

INTERVIEWER ASK OR CODE: Does this person live in this home at present?

1 Yes

2 No

END FILTER

ELSE (i.e. more than one relative given at EIHOWH)

**EiHoLv** (EIHOLV2 for first other home)

Do any of these people currently live in that home?

1 Yes

2 No

| | | | | *IF any of these people currently live in home [EiHoLv = Yes]*

| | | | | **EIHOLW** (EIHOLW24 to 46 for first other home)

| | | | | **[Multiple responses to EIHOLW are recorded in variables EIHOLW24 to EIHOLW 46 as maximum number of other properties was 1 so only one loop]**

| | | | | SHOW CARD EI14

| | | | | Who lives in the house at present? CODE ALL THAT APPLY.

| | | | | 01 Respondent (you)

| | | | | 02 Husband/Wife

| | | | | 03 Partner/cohabitee

| | | | | 04 Natural son/daughter

| | | | | 05 Adopted son/daughter

| | | | | 06 Foster son/daughter

| | | | | 07 Step-son/step-daughter/child of partner

| | | | | 08 Son-in-law/daughter-in-law

| | | | | 09 Natural parent

| | | | | 10 Adoptive parent

| | | | | 11 Foster parent

| | | | | 12 Step-parent/parent's partner

| | | | | 13 Parent-in-law

| | | | | 14 Natural brother/sister

| | | | | 15 Half-brother/sister

| | | | | 16 Step-brother/sister

| | | | | 17 Adopted brother/sister

| | | | | 18 Foster brother/sister

| | | | | 19 Brother-in-law/sister-in-law

| | | | | 20 Grandchild

| | | | | 21 Grandparent

| | | | | 22 Other relative (specify at next question)

| | | | | 23 Other non-relative (specify at next question)

| | | | | END FILTER

| | | | | END FILTER

| | | | | END FILTER

| | | | | **EISPLIVE** (EISPLIV2 for first other home)

| | | | | **[Loop: Responses to EISPLIVE are recorded in variable EISPLIV2 as maximum number of other properties was 1 so only one loop]**

| | | | | INTERVIEWER ASK OR CODE: Does [^deceased ELSA respondent's name]'s spouse/partner live in that home at present?

| | | | | 1 Yes

| | | | | 2 No

| | | | | *IF no one lives in the home [((EiHoLiv <> Yes) AND (EiHoLv <> Yes)) AND (EiSpLive <> Yes)]*

| | | | | **EIHOSLD** (EIHOSLD2 for first other home)

| | | | | **[Loop: Responses to EIHOSLD are recorded in variable EIHOSLD2 as maximum number of other properties was 1 so only one loop]**

| | | | | What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF Other has happened to home [EiHoSId = 95 (Other)]*

**EIHOSOTH @**

INTERVIEWER: Record what has happened to the home.  
STRING 100

END FILTER

END FILTER

**EIHOA @** (see DVEIHOA2 for first other home grouped for non-disclosure)

**[Loop: Responses to EIHOA are recorded in variable EIHOA2 as maximum number of other properties was 1 so only one loop]**

What [^is/was] the [^value/ selling price] of that home?

Range: 1..9999997

*IF no response to value of home [EiHoa = NONRESPONSE]*

**EiHoab** (for first other home)

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EiHool1, EiHoou1, EiHooe1, EiHoor1]

END FILTER

**EIHOMG** (EIHOMG2 for first other home)

**[Loop: Responses to EIHOMG are recorded in variable EIHOMG2 as maximum number of other properties was 1 so only one loop]**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

1 Yes

2 No

*IF there was outstanding balance on mortgage [EiHoMg = Yes]*

**EIHOMGI** (EIHOMGI2 for first other home)

**[Loop: Responses to EIHOMGI are recorded in variables EIHOMGI2 as maximum number of other properties was 1 so only one loop]**

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

1 Yes, In full

2 Yes, partially

3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EiHoMgl 2 or 3]*

**EIHOMGA** (EIHOMGA2 for first other home)

**[Loop: Responses to EIHOMGA are recorded in variables EIHOMGA2 as maximum number of other properties was 1 so only one loop]**

How much was the outstanding balance on this mortgage [mgtxt]?

Range: 1..9999997

*IF no response to outstanding balance [EiHoMga = NONRESPONSE]*

**EiHoMgab** (first other home)

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EiHobol1, EiHobou1, EiHoboe1, EiHobor1]

END FILTER

END FILTER

END FILTER

ELSE

**EIJJOINT** (EIJJOINT2 for first other home)

**[Loop: Responses to EIJJOINT are recorded in variables EIJJOINT2 as maximum number of other properties was 1 so only one loop]**

Did [^deceased ELSA respondent's name] own this home jointly with someone else?

1 Yes

2 No

*IF deceased owned home jointly [EiJoint = Yes]*

**EIOTHO** (EIOTHO24 to 46 for first other home)

**[Multiple responses to EIOTHO are recorded in variables EIOTHO24 to EIOTHO46]**

Who else owned the house with [^deceased ELSA respondent's name] when [^he/she] died?

INTERVIEWER: CODE ALL THAT APPLY

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF Response given to who else owned home [EiOthO = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN EiOthO [idy IN EiOthO]*

**EIOTHN @**

**[Loop: Responses to EIOTHN are recorded in variables EIOTHN2 as maximum number of other properties was 1 so only one loop]**

How many [^types of relative from EIOTHO] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

**EISHARE** (EISHARE2 for first other home)

**[Loop: Responses to EIOSHARE are recorded in variables EIOSHA01 as maximum number of other properties was 1 so only one loop]**

What share of the house did [^deceased ELSA respondent's name] own?

- 1 As a percentage
- 2 As a fraction
- 3 As a monetary amount

*IF share expressed as a percentage [EiOShare = 1]*

**EIOSHP** (EIOSHP2 for first other home)

**[Loop: Responses to EIOSHP are recorded in variables EIOSHP2 as maximum number of other properties was 1 so only one loop]**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share expressed as a fraction [EiOShare = 2]*

**EIOSHF @@**

**[Loop: Responses to EIOSHF are recorded in variables EIOSHF2 as maximum number of other properties was 1 so only one loop]**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share expressed as an amount [EiOShare = 3]*

**EIOSHA** (EIOSHA2 for first other home)

**[Loop: Responses to EIOSHA are recorded in variables EIOSHA2 as maximum number of other properties was 1 so only one loop]**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

**EIOIN** (EIOIN2 for first other home)

**[Loop: Responses to EIOIN are recorded in variables EIOIN2 as maximum number of other properties was 1 so only one loop]**

Did only those with joint ownership inherit [^deceased ELSA respondent's name]'s share of the house?

1 Yes

2 No

3 Don't know

*IF it was not only those with joint ownership who inherited share of the house [EioIn = No]*

**EIOINW** (EIOINW24 to 46 for first other home)

**[Multiple responses to EIOINW are recorded in variables EIOINW24 to EIOINW46]**

Who else inherited [^deceased ELSA respondent's name]'s share of the home?

INTERVIEWER: DO NOT CODE JOINT OWNERS AGAIN

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

```

    LOOP FOR idy:= 4 TO 23

    IF QFinance.idy IN EioInW [idy IN EioInW]

        EIOINN (EIOINN24 to 46 for first other home)
        [Loop: Responses to EIOINN are recorded in variables EIOINN24 to EIOINN46]
        How many [^type of relative from EIOINW] are you referring to?
        Range: 1..20

    END FILTER

    END FILTER

    END FILTER

ELSE (i.e. IF house was not jointly owned)
    EioHwH (EIOHWH24 to 46 for first other home)
    [Multiple responses to EIOINW are recorded in variables EioHwH24 to EioHwH46]
    SHOW CARD EI14
    Who inherited this home (that is, what is their relationship to
    [^deceased ELSA respondent's name]?
    CODE ALL THAT APPLY
    INTERVIEWER: Only code once for respondent. For example if
    respondent is son or daughter code 'Respondent', and not son or
    daughter. Only code 'Son' or 'Daughter' for those other than
    respondent.
    01 Respondent (you)
    02 Husband/Wife
    03 Partner/cohabitee
    04 Natural son/daughter
    05 Adopted son/daughter
    06 Foster son/daughter
    07 Step-son/step-daughter/child of partner
    08 Son-in-law/daughter-in-law
    09 Natural parent
    10 Adoptive parent
    11 Foster parent
    12 Step-parent/parent's partner
    13 Parent-in-law
    14 Natural brother/sister
    15 Half-brother/sister
    16 Step-brother/sister
    17 Adopted brother/sister
    18 Foster brother/sister
    19 Brother-in-law/sister-in-law
    20 Grandchild
    21 Grandparent
    22 Other relative (specify at next question)
    23 Other non-relative (specify at next question)

    IF who inherited the home was answered [EioHwH = RESPONSE]

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```

| | | | | LOOP FOR idy:= 4 TO 23
| | | | |
| | | | | /IF QFinance.QHomNo.idy IN EioHwH [idy IN EioHwH]
| | | | |
| | | | | EIOHWN (EIOHWN24 to 46 for first other home)
| | | | | [Loop: Responses to EIOHWN are recorded in variables EIOHWN24 to EIOHWN46]
| | | | | How many [^type of relative from EioHwH] are you referring to?
| | | | | Range: 1..20
| | | | |
| | | | | END FILTER
| | | |
| | | | | END FILTER
| | | |
| | | | | END FILTER
| | | |
| | | | | END FILTER
| | |
| | | | | If only one answer at EioHwH
| | | | | /[EioHwH.CARDINAL = 1) AND (EiHowN[EioHwH [1].ORD] = 1)]
| | |
| | | | | EIOHLIV (EIOHLIV2 for first other home)
| | | | | [Loop: Responses to EIOHLIV are recorded in variables EIOHLIV2 as maximum number of other properties was 1 so only one loop]
| | | | | INTERVIEWER: ASK OR CODE: Does this person live in the home at present?
| | | | | 1 Yes
| | | | | 2 No
| | |
| | | | | ELSE (i.e. more than one relative mentioned at EioHwH)
| | | | | EioHLv (EIOHLV2 for first other home)
| | | | | [Loop: Responses to EIOHLV are recorded in variables EIOHLV2 as maximum number of other properties was 1 so only one loop]
| | | | | Do any of these people who now own the property currently live in that home?
| | | | | 1 Yes
| | | | | 2 No
| |
| | | | | IF any other owner lives in the home [EioHLv = Yes]
| | |
| | | | | EIOHLW (EIOHLW24 to 46 for first other home)
| | | | | [Multiple responses to EIOHLW are recorded in variables EIOHLW01 to EIOHLW23]
| | | | | Who lives in the house at present? CODE ALL THAT APPLY.
| | | | | 01 Respondent (you)
| | | | | 02 Husband/Wife
| | | | | 03 Partner/cohabitee
| | | | | 04 Natural son/daughter
| | | | | 05 Adopted son/daughter
| | | | | 06 Foster son/daughter
| | | | | 07 Step-son/step-daughter/child of partner
| | | | | 08 Son-in-law/daughter-in-law
| | | | | 09 Natural parent
| | | | | 10 Adoptive parent
| | | | | 11 Foster parent

```

- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

ELSE

*IF no one lives in the home [EioHLv = No]*

**EIOHSLD** (EIOHSLD2 for first other home)

**[Loop: Responses to EIOHSLD are recorded in variables EIOHSL2 as maximum number of other properties was 1 so only one loop]**

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to home [EioHSId = 95 (Other)]*

**EIOHSO @**

INTERVIEWER: Record what has happened to the home.

STRING 100

END FILTER

END FILTER

END FILTER

END FILTER

**EIOHA** (EIOHA2 for first other home)

**[Loop: Responses to EIOHA are recorded in variables EIOHA2 as maximum number of other properties was 1 so only one loop]**

What [^is/was] the [^value/selling price] of that home?

Range: 1..9999997

*IF no response to value [EioHa = NONRESPONSE]*

**EioHab** (first other home)

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EioHl2, EioHu2, EioHe2, EioHr2]

END FILTER

**EIOHMG** (EIOHMG2 for first other home)

*[Loop: Responses to EIOHMG are recorded in variables EIOHMG2 as maximum number of other properties was 1 so only one loop]*

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

- 1 Yes
- 2 No

*IF EioHMg = Yes [EioHMg = Yes]*

**EIOHMG1** (EIOHMG12 for first other home)

*[Loop: Responses to EIOHMG1 are recorded in variables EIOHMG2 as maximum number of other properties was 1 so only one loop]*

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

- 1 Yes, In full
- 2 Yes, partially
- 3 No

*IF no insurance policy to pay of mortgage fully [EioHMgl =2 or 3]*

**EIOHMGA** (EIOHMGA2 for first other home)

*[Loop: Responses to EIOHMGA are recorded in variables EIOHMGA2 as maximum number of other properties was 1 so only one loop]*

How much was the outstanding balance on this mortgage [^after the insurance policy pay out]?

Range: 1..9999997

*IF no response to outstanding balance [EioHMga = NONRESPONSE]*

**EioHMgab** (for first other home)

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EioHl2, EioHu2, EioHe2, EioHr2]

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**EIPHY**

Did [^deceased ELSA respondent's name] own a business or share in a business, including land or premises?

1 Yes

2 No

*/F owned a business or share [Elphy = Yes]*

**EIPHYA**

In total, how much were these business assets worth (after any debts had been paid off on them)?

Range: 0..9999997

*/F no response to value of business assets [ELPHYA = NONRESPONSE]*

**Elphyab**

Was it.....

BRACKETS (10000, 50000, 150000, 500000)

[Bracket results are recorded in Elphl, Elphu, Elphe, Elphr]

END FILTER

END FILTER

*/F owned a business or share of business [ELPHY = Yes]*

**EIPHYWH**

***[Multiple responses to EIPHYWH are recorded in variables EIPHYW01 to EIPHYW23]***

SHOW CARD EI14

Who inherited these business assets? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild

- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF Other relative inherited business assets or share of business [ElPhyWh= 22]*

**EIPHYWR @**

INTERVIEWER: Please specify the other relative(s).  
STRING 80

END FILTER

*IF Other non-relative inherited business assets or share of business [ElPhyWh= 23]*

**EIPHYWN @**

INTERVIEWER: Please specify the other non-relative(s).  
STRING 80

END FILTER

*IF respondent inherited business assets [ElPhyWh=1]*

**EIPHYRES**

In total, how much did you inherit from these business assets?  
Range: 0..9999997

END FILTER

*IF husband/wife inherited business assets [ElPhyWh=2]*

**EIINHSPS**

In total, how much did the husband/wife inherit from these business assets?  
Range: 0..9999997

END FILTER

*IF partner inherited business assets [ElPhyWh=3]*

**EIINHPRT**

In total, how much did the partner/cohabitee inherit from these business assets?  
Range: 0..9999997

END FILTER

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy [idy IN ElPhyWh]*

**EINUMREL**

*[Loop: Responses to EINUMREL are recorded in variables EINUMRE04 to EINUMR23]*

How many [^type of relative from EIOTHAS] are you referring to?  
INTERVIEWER: If same relationship, do not include respondent here.  
Range: 1..20

*IF response to question about number of relatives [EiNumRel = RESPONSE]*

LOOP FOR idx:= 1 TO EiNumRel

EIAMT

*[Loop: Responses to EIAMT are recorded in variables EIAMT04 to EIAMT400]*

In total, how much did the [^first /second etc] [^type of relative from EIOHAS] inherit  
[^from these]?

**INTERVIEWER:** Enter amount in pounds.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF will has been through probate and assets have been shared out [(QWill.EiBen <> NotYet) AND (QWill.EiWillB <> No)]*

EIOTHAS

*[Multiple responses to EIOTHAS are recorded in variables EIOTHA01 to EIOTHA24]*

SHOW CARD EI14

Excluding any housing, pensions, or businesses [^deceased ELSA respondent's name] had, who inherited the rest of [^his/her] assets? CODE ALL THAT APPLY.

**INTERVIEWER:** Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent
  - 02 Husband/Wife
  - 03 Partner/cohabitee
  - 04 Natural son/daughter
  - 05 Adopted son/daughter
  - 06 Foster son/daughter
  - 07 Step-son/step-daughter/child of partner
  - 08 Son-in-law/daughter-in-law
  - 09 Natural parent
  - 10 Adoptive parent
  - 11 Foster parent
  - 12 Step-parent/parent's partner
  - 13 Parent-in-law
  - 14 Natural brother/sister
  - 15 Half-brother/sister
  - 16 Step-brother/sister
  - 17 Adopted brother/sister

- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)
- 96 No other assets inherited

*IF other relative inherited rest of assets [EiOthAs=22]*

**EIOTHWR @**

INTERVIEWER: Please specify the other relative(s).  
STRING 80

END FILTER

*IF other non-relative inherited rest of assets [EiOthAs=23]*

**EIOTHWN @**

INTERVIEWER: Please specify the other non-relative(s).  
STRING 80

END FILTER

*IF respondent inherited rest of assets [EiOthAs=1]*

**EIOTHRES @** (see DVEIOTHRES grouped for non-disclosure)

In total, how much did you inherit from the rest of [^his/her] assets?  
Range: 0..9999997

END FILTER

*IF husband/wife inherited rest of assets [EiOthAs=2]*

**EIOTHSPS @** (see DVEIOTHSPS grouped for non-disclosure)

In total, how much did the husband/wife inherit from the rest of [^his/her] assets?  
Range: 0..9999997

END FILTER

*IF partner inherited rest of assets [EiOthAs=3]*

**EIOTHPRT**

In total, how much did the partner/cohabitee inherit from the rest of [^his/her]  
assets?  
Range: 0..9999997

END FILTER

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN SHOW CARD EI14 Excluding any [idy IN EiOthAs]*

**EINUMREL**

***[Loop: Responses to EINUMREL are recorded in variables EINUMR24 to EINUMR40]***

How many [^type of relative from EIOTHAS] are you referring to?

INTERVIEWER: If same relationship, do not include respondent here.

Range: 1..20

*IF responded to EINUMREL [EiNumRel = RESPONSE]*

LOOP FOR idx:= 1 TO EiNumRel

**EIAMT**

***[Loop: Responses to EIAMT are recorded in variables EIAMT401 to EIAMT800]***

In total, how much did the [^first\second etc] [^type of relative from EIOTHAS] inherit [^from these]?

INTERVIEWER: Enter amount in pounds.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF assets have not yet been shared out [QWill.EiBen = NotYet (4)]*

**EIAMPROB @@**

Excluding any housing, pensions, or businesses [^deceased ELSA respondent's name] had, what was |the total value of these other assets?

Range: 0..9999997

END FILTER

**EILI**

Did [^deceased ELSA respondent's name] have any life insurance policies which paid out on [^his/her] death?

1 Yes

2 No

*IF had any life insurance [EiLI = Yes]*

**EILIWH**

***[Multiple responses to EILIWH are recorded in variables EILIWH01 to EILIWH23]***

SHOW CARD EI14

Who were the beneficiaries of the life insurance policies? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative was a beneficiary of insurance policy [EILWWh=22]*

**EILIWR @**

INTERVIEWER: Please specify the other relative(s).  
STRING 80

END FILTER

*IF other non-relative was a beneficiary of insurance policy [EILWWh=23]*

**EILIWN @**

INTERVIEWER: Please specify the other non-relative(s).  
STRING 80

END FILTER

**EILIA @** (see DVEILLA grouped for non-disclosure)

How much in total was the pay out from the life insurance?

Range: 1..9999997

LOOP FOR idx:= 1 TO 24

**EILIB**

*[Loop: Responses to EILIB are recorded in variables EILIB01 to EILIB24]*

How much did [^you\the type of relative] receive from these life insurance policies.

Range: 1..9999997

*IF no response to amount received [EiL1b[Idx] = NONRESPONSE]*

**EiL1b**  
Was it.....  
BRACKETS (2000, 10000, 50000, 300000)  
[Bracket results are recorded in EiL1I1-24, EiL1u1-24, EiL1e1-24, EiL1r1-24]

END FILTER

END FILTER

END FILTER

END FILTER

**EIENDA @**

We have asked you many questions about numerous aspects of [^deceased ELSA respondent's name]'s health and finances, and we want to thank you very much for your assistance with them. Is there anything else you would like to add about [^deceased ELSA respondent's name] in [^his/her] last year of life?

INTERVIEWER: If nothing to say, type None and press END.

STRING 500

**EIENDB @**

Thank you once again for all the information you have given us. It will prove extremely useful in helping us to understand how people fare at the end of their lives, and in forming policies which can help them.

Range: 1..1

# English Longitudinal Study of Ageing (ELSA)

**Wave 6 nurse questionnaire**

Archived Version 1 – June 2014

## **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

### **Variables omitted from the archived dataset**

@ - This means that the variable has been omitted from the archived dataset (see User Guide for more information).

### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

### **Program Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the nurse is accurate and consistent. The places where checks were used are indicated in this documentation. These are numbered and all have the prefix "N" (to indicate that they are in the nurse questionnaire): e.g.

#### **[CHECK N1]**

The routing and wording for the checks are in the appendix.

## DEMOGRAPHICS MODULE

### NAME @

NURSE: Enter the name of person number [^person number from Household Grid] from section 7 on the NRF.

String 20

[Don't Know and Refusal are not allowed]

### SEX

NURSE: Code the sex of person number [^person number from Household Grid] from section 7 on the NRF.

1 Male

2 Female

[Don't Know and Refusal are not allowed]

### AGE @

NURSE: Enter the age of person number [^person number from Household Grid] from section 7 on the NRF.

Range: 0..120

[Don't Know and Refusal are not allowed]

### POC

NURSE: Enter the nurse status code for person number ^PNo from section 7 on the NRF.

1 Core member and agreed Nurse visit

2 Core member and refused nurse visit

4 Partner requested Nurse Visit"

[Don't Know and Refusal are not allowed]

*IF (nurse status code for person number ^PNo from section 7 on the NRF [Core member and agreed Nurse visit, Core member and refused Nurse visit]) THEN Nurse status code := nurse status code for person number ^PNo from section 7 on the NRF. ELSEIF (nurse status code for person number ^PNo from section 7 on the NRF = Partner requested Nurse Visit) THEN nurse status code := Partner requested nurse visit  
[(POC IN [1,2]) THEN OC := POC. ELSEIF (POC = 4) THEN OC := 5]*

### OC

Nurse status code:

1 Agreed Nurse Visit (including partners)

2 Refused Nurse Visit

5 Partner requested Nurse Visit

6 Partner refused nurse visit"

[Don't Know and Refusal are not allowed]

|

END FILTER

### MORE

NURSE: Is there anyone else in the household who agreed or refused to see you?  
(i.e. coded 1, 2 or 4 at section 7 on the NRF.)"

1 Yes

2 No

**STRTNUR @**

NURSE: Enter the start time of the interview in hours and minutes using the 24-hour clock (e.g 17:30).

[Don't Know and Refusal are not allowed]

*IF Date of interview = EMPTY [NurDate = EMPTY]*

**DATEOK @**

NURSE: Today's date according to the laptop is [^automatically recorded date of interview]. Is this the correct date?

- 1 Yes
- 2 No

[Don't Know and Refusal are not allowed]

*IF Whether today's date is shown correctly = Yes [DateOK = 1]*

*ELSE IF Whether today's date is shown correctly = No [DateOK = 2]*

**NURDATE @**

NURSE: Enter the date of this interview.

[Don't Know and Refusal are not allowed]

**[Month of interview is recorded in variable VISMON and year of interview is recorded in variable VISYEAR]**

END FILTER

**[CHECK N1]**

END FILTER

**NDOBD @**

Can I just check your date of birth?

NURSE: Enter day, month and year of [^Name of respondent]'s date of birth separately.

Enter the day here.

Range: 1..31

**NDOB M @**

NURSE: Enter the code for the month of [^Name of respondent]'s date of birth.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October

- 11 November
- 12 December

| **NDOBY<sup>1</sup>** @

NURSE: Enter the year of [^Name of respondent]'s date of birth.  
Range: 1890..2100

**[Year of birth is recorded in variable DOBYEAR.  
Respondents aged 90 or over are coded as -7]**

**[There are 2 age variables in the file:**

**HHAGE: Age derived from date of birth and date of nurse visit - used for**

**eligibility for measures throughout interview**

**CONFAGE: Actual age at nurse visit]**

**[CHECKS N2 - N5]**

**DISPAGE @**

CHECK WITH RESPONDENT: So your age is [^respondent's age (derived from respondent's date of birth and today's date)]?

- 1 Yes
- 2 No

**[CHECKS N6a – N6b]**

---

<sup>1</sup> See variable Indobyr in dataset for year of birth. Any respondent aged 90 or older is represented as 90+.

## **PRESCRIBED MEDICATIONS AND DRUG CODING**

### **MEDCNJD**

Are you taking or using any medicines, pills, syrups, ointments, puffers or injections prescribed for you by a doctor or a nurse?

NURSE: If statins have been prescribed by a doctor please code them here. If they have been bought without a prescription code at the Statins question.

1 Yes

2 No

3 Yes, but unable to code as name of drug(s) not available

*IF respondent taking medication = Yes [MEDCNJD = 1]*

### | **MEDINTRO@**

| Could I take down the names of the medicines, including pills, syrups, ointments, | puffers or injections, prescribed for you by a doctor or a nurse?

| NURSE: Including the contraceptive pill.

| Press <1> and <Enter> to continue."

### | **MEDBI@**

| NURSE: Enter name of drug number. Ask if you can see the containers for all | prescribed medicines currently being taken. If Aspirin, record dosage as well as name."

| STRING[50]

### | **MEDBIA**

| Have you taken/used ^MedBI in the last 7 days?"

| 1 Yes

| 2 No

### | **MEDBIC@**

| NURSE CHECK: Any more drugs to enter?"

| 1 Yes

| 2 No

|

| Repeat **MEDBI**, **MEDBIA**, **MEDBIC** for up to 40 drugs

### **STATINS**

Are you taking statins (drugs to lower cholesterol) bought over the counter from a pharmacist, without prescription from a doctor?

NURSE: Here are some examples of common statins, which may be bought over the counter:

Atorvastatin (Lipitor)

Fluvastatin (Lescol, Lescol XL)

Pravastatin (Lipostat)

Rosuvastatin (Crestor) and Simvastatin (Zocor)

1 Yes

2 No

*IF taking statins bought over the counter = yes [STATINS=1]*

| **STATINA**

- | Have you taken/used statins in the last 7 days?"  
|  
| 1 Yes  
| 2 No

**BPTODAY**

May I just check, have you taken any medication for your blood pressure today?"

- 1 Yes  
2 No

*IF taken medication for blood pressure today = yes [BPTODAY=1]*

| **BPHOUR**

- | When did you last take medication for your blood pressure?  
| Was it... READ OUT...  
|  
| 1 Less than 30 minutes ago  
| 2 More than 30 minutes but less than one hour ago  
| 3 More than one hour ago

NURSES HAD THE OPTION TO CODE THE DRUGS ENTERED AT A NUMBER OF STAGES DURING THE INTERVIEW. THIS WAS THE FIRST OPPORTUNITY.

| **DrCod1@**

- | NURSE: To do the drug coding now, press <Ctrl Enter>, select Drug Code with the highlight bar and press <Enter>.  
| Else, press <1> and <Enter> to continue>.

| *IF code drugs now selected*

| **DRC1**

- | NURSE: Enter code for (*name of drug*)  
| STRING 6

**[CHECKS N7a-N7c]**

*IF first two digits of drug code = 02*

|| **YTAKE1**

- || Do you take ^MedBI because of a heart problem, high blood pressure or for some other reason?  
|| 1 Heart problem  
|| 2 High blood pressure  
|| 3 Cholesterol<sup>2</sup>  
|| 4 Other reason

---

<sup>2</sup> This answer option was created retrospectively and coded from the open answers given at YTakeOth1

// IF take drug for another reason [YTake1 = 3]

||| **TAKEOTH1@**

||| NURSE: Give full details of reason(s) for taking ^MedBl.

||| Press <Esc> when finished.

## BLOOD PRESSURE MODULE

### BPMOD @

NURSE: Now follows the Blood Pressure module.

Press <1> and <Enter> to continue.

Range: 1..1

### BPCONST<sup>3</sup>@

(As I mentioned earlier) We would like to measure your blood pressure. The analysis of blood pressure readings will tell us a lot about the health of the population.

NURSE: Does the respondent agree to blood pressure measurement?

- 1 Yes, agrees
- 2 No, refuses
- 3 Unable to measure BP for reason other than refusal  
[Don't Know and Refusal are not allowed]

*IF Whether respondent agrees to BP measurement = Yes [BPConst = 1]*

### CONSUBX

May I just check, have you eaten, smoked, drunk alcohol or done any [^BLANK / vigorous] exercise in the past 30 minutes?

CODE ALL THAT APPLY.

- 1 Eaten
- 2 Smoked
- 3 Drunk alcohol
- 4 Done [^BLANK / vigorous] exercise
- 5 (None of these)

[Don't Know and Refusal are not allowed]

**[Multiple responses to CONSUBX are recorded in variables CONSUB1 to CONSUB3]**

**[Code maximum 4 out of 5 possible responses]**

**[CHECKS N8-N9]**

### OMRONNO @

NURSE: Record blood pressure equipment serial number.

Range: 1..999

### CUFSIZE

NURSE: Select cuff and attach to the respondent's right arm.

Ask the respondent to sit still for five minutes.

READ OUT: 'I am going to leave you to sit quietly now for 5 minutes. During that you must not read and your legs are to remain uncrossed. After the 5 minutes, I will carry out 3 recordings with a minute between them. While I am doing these recordings I will not speak to you, and you must not speak to me. Once I have completed the recordings I will tell you what they are.'

Record cuff size chosen.

1 Child (15-22 cm)

<sup>3</sup> See variable respbps and whynobp in dataset for information about measurements, attempts and refusals.

- | 2      Adult (22-32 cm)
- | 3      Large adult (32-42 cm)")

**AIRTEMP**

NURSE: Record the ambient air temperature.  
Enter the temperature in centigrades to one decimal place.  
Range: 0.0..40.0

**[CHECKS N10 - N11]**

**BPREADY @**

NURSE: During five minute wait, prepare documents for rest of Nurse Visit:  
- Consent booklet  
- Grip strength measurement card  
- Measurement record card  
If appropriate, prepare equipment for rest of Nurse Visit.  
Once respondent has sat still for 5 minutes you are ready to take the measurements.  
Ensure the Ready to measure symbol is lit before pressing the Start button to start the measurements.  
Press <1> and <Enter> to continue.  
String 1

REPEAT MEASUREMENT THREE TIMES (if SYS<>996) [LOOP FOR I:= 1 TO 3]

**DrCod2@**

NURSE: To do the drug coding now, press <Ctrl Enter>, select Drug Code with the highlight bar and press <Enter>.  
Else, press <1> and <Enter> to continue>.

**SYS**

NURSE: Take three measurements from right arm.  
Enter [<sup>1</sup>first / second / third] systolic reading (mmHg).  
If reading not obtained, enter 999.  
If you are not going to get any bp readings at all, enter 996.  
Range: 1..999

**[Responses to SYS are recorded in variables SYS1 to SYS3]**

**[CHECK N12]**

**DIAS**

Enter [<sup>1</sup>first / second / third] diastolic reading (mmHg).  
If reading not obtained, enter 999.  
Range: 1..999

**[Responses to DIAS are recorded in variables DIAS1 to DIAS3]**

**[CHECKS N13 - N14]**

**PULSE**

Enter [<sup>1</sup>first / second / third] pulse reading (bpm).  
If reading not obtained, enter 999.

Range: 1..999  
[Responses to PULSE are recorded in variables PULSE1 to PULSE3]

[CHECKS N15 - N23]

[CHECKS N24 - N25]

END OF LOOP

IF Number of valid BP readings = 0 [Reads = 0]

**WHYNOBP**

NURSE: Enter reason for not recording any full BP readings.

- 1 Blood pressure measurement attempted but not obtained
- 2 Blood pressure measurement not attempted
- 3 Blood pressure measurement refused

END FILTER

END FILTER

[Mean Arterial Pressure (MAP) readings are recorded in variables MAP1 to MAP3.  
Whether each set of readings is complete is computed and recorded in variables FULL1 to FULL3

Whether all BP measurements have been obtained is computed and recorded in variable RespBPS]

**RespBPS**

Number of BP measurements obtained

- 1 Three
- 2 Two
- 3 One
- 4 Tried
- 5 No Try
- 6 Refused

IF (Response to BP measurements = [Two, one, tried, did not try, refused]) OR  
(Whether respondent agrees to have blood pressure measured = No)  
([RespBPS = [2 - 6]] OR (BPConst = 2))

**NATTBPD**

NURSE: Record why [^only two readings obtained /only one reading obtained / reading not obtained / reading not attempted / reading refused / unable to take reading].

CODE ALL THAT APPLY.

- 1 Problems with PC
- 2 Respondent upset / anxious / nervous
- 3 Error reading
- 4 Problems with cuff fitting / painful
- 5 Problems with equipment (not error reading)

| 6 Other reason(s) (specify at next question)  
| **[Multiple responses to NATTBPD are recorded in variables NATTBP1 to  
| NATTBP2]**  
| **/ [Code maximum 6 out of 6 possible responses]**  
|  
END FILTER

*IF (Reason why full set of BP measurements was not collected = Other) OR (Reason  
why full set of BP measurements was not collected = [EMPTY, Other])  
[(NAttBPD = 3) AND (CNattBPD = [EMPTY, 3])]*

| **OTHNBP @**  
| NURSE: Enter full details of other reason(s) for not obtaining / attempting three BP  
| readings.  
| String 140  
|  
END FILTER

*IF Response to BP measurements = [Three, two, one] [RespBPS = [1 - 3]]*

| **DIFBPC**  
| NURSE: Record any problems taking readings.  
CODE ALL THAT APPLY.  
| 1 No problems taking blood pressure  
| 2 Reading taken on left arm because right arm not suitable  
| 3 Respondent was upset / anxious / nervous  
| 4 Problems with cuff fitting / painful  
| 5 Problems with equipment (not error reading)  
| 6 Error reading  
| 7 Other problems (specify at next question)  
| **[Multiple responses to DIFBPC are recorded in variables DIFBPC1 to DIFBPC3]**  
| **/ [Code maximum 3 out of 7 possible responses]**  
|  
| **[CHECK N26]**

END FILTER

*IF Problem taking BP readings = Other [DifBPC = 7]*

| **OTHDIFBP @**  
| NURSE: Record full details of other problem(s) taking readings.  
| String 140  
|  
END FILTER

*IF Response to BP measurements = [Three, two, one] [RespBPS = [1 - 3]]*

| **GPREGB @**  
| Are you registered with a GP?  
| 1 Yes  
| 2 No

| END FILTER

| *IF Whether respondent registered with GP = Yes [GPRegB = 1]*

| | **GPSEND @**

| | May we send your blood pressure readings to your GP?

- | | 1 Yes  
| | 2 No

| | *IF Whether results may be sent to GP = No [GPSend = 2]*

| | | **GPREFC @**

| | | NURSE: Specify reason(s) for refusal to allow BP readings to be sent to GP.  
CODE ALL THAT APPLY.

- | | | 1 Hardly / Never sees GP  
| | | 2 GP knows respondent's BP level  
| | | 3 Does not want to bother GP  
| | | 4 Other (specify at next question)

| | | **[Code maximum 4 out of 4 possible responses]**

| | | *IF Reason why respondent does not want BP results sent to their GP = Other [GPRefC = 4]*

| | | | **OTHREFC @**

| | | | NURSE: Give full details of reason(s) for refusal.

| | | | String 140

| | | END FILTER

| | END FILTER

| END FILTER

| | *IF (Whether respondent registered with GP <> Yes) OR (Whether BP results may be sent to GP = No) [(GPRegB <> 1) OR (GPSend = 2)]*

| | | **Code022@**

| | | NURSE: Circle consent code 02 on the front of the Consent Booklet.

| | | Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet.

| | | Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5 of the Consent Booklet.

| | | Press <1> and <Enter> to continue.

| | | Record not consented for BP results to GP

| | | Press <1> to continue.

| | | *ELSE IF Whether BP results may be sent to GP = Yes [GPSend = 1]*

| | | *IF Response to BP measurements = [Three, two, one] [RespBPS = [1 - 3]]*

| **BPOFFER @ [See Nurse project instructions for definitions of mildly, moderately and considerably raised BP]**

| NURSE: Offer blood pressure results to respondent.

	Systolic	Diastolic	Pulse
i)	[^Sys1]	[^Dias1]	[^Pulse1]
ii)	[^Sys2]	[^Dias2]	[^Pulse2]
iii)	[^Sys3]	[^Dias3]	[^Pulse3]

| Enter these on [^Name of respondent]'s Measurement Record Card.

| Tick the [^considerably raised / moderately raised / mildly raised / normal] box  
and read out to respondent:

| [If BP is considerably raised:

| ^Your blood pressure is high today. Blood pressure can vary from day to day and  
throughout the day so that one high reading does not necessarily mean that you suffer  
from high blood pressure. You are strongly advised to visit your GP within 5 days to  
have a further blood pressure reading to see whether this is a once-off finding or not.

| NURSE: If respondent is elderly, advise [^him / her] to contact GP within next 7 - 10  
days. Please report this reading to the Survey Doctor when you get home.]

| [If BP is moderately raised:

| ^Your blood pressure is a bit high today. Blood pressure can vary from day to day  
and throughout the day so that one high reading does not necessarily mean that you  
suffer from high blood pressure. You are advised to visit your GP within 2 weeks  
to have a further blood pressure reading to see whether this is a once-off finding or not.]

| [If BP is mildly raised:

| ^Your blood pressure is a bit high today. Blood pressure can vary from day to day  
and throughout the day so that one high reading does not necessarily mean that you  
suffer from high blood pressure. You are advised to visit your GP within 2 months to  
have a further blood pressure reading to see whether this is a once-off finding or not.]

| [If BP is normal:

| ^Your blood pressure is normal.]

| Press <1> and <Enter> to continue.

| String 1

| END FILTER

| **CONSFRM1 @**

| NURSE:

| a) Ask respondent to read and initial 'Blood pressure to GP on page 2 of the Consent  
Booklet. Explain the need for written consent and ask the respondent to print name,  
sign and date the Consent Form in the spaces provided at the bottom of page 5 of the  
Consent Booklet.

| Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5  
of the Consent Booklet.

| b) Check that GP name, address and phone no. are recorded on the front of the  
| Consent Booklet.  
| c) Check the name by which GP knows respondent.  
| d) Circle consent code 01on front of the Consent Booklet.  
| Press <1> and <Enter> to continue.  
|  
END FILTER

## GRIP STRENGTH MODULE

### GRINT @

NURSE: Now follows the Grip Strength module.

Press <1> and <Enter> to continue.

Range: 1..1

### MMGSWIL

Now I would like to assess the strength of your hand in a gripping action.

I will count up to three and then ask you to squeeze this handle as hard as you can, just for two or three seconds and then let go.

NURSE: Demonstrate.

READ OUT: I will take alternately three measurements from your right and your left hand.

Would you be willing to have your handgrip measured?

1 Yes

2 No

3 Unable to take measurement

*IF Whether respondent is willing to have grip strength measured = [No, Unable]  
[MMGSWil = [2, 3]]*

### MMGSWN @

| NURSE: Give details why grip strength test not attempted.

| String 60

*ELSE*

### MMGSDOM

| NURSE: ASK OR CODE : Which is your dominant hand?

| 1 Right hand

| 2 Left hand

### MMGSSTA

| Can I just check, have you had a recent hand injury or surgery to either hand within the last six months?

| NURSE: If yes, do not attempt grip strength measure with affected hand(s).

| If respondent cannot use hand(s) for this or any other reason, code below.

| Record respondent status.

| 1 Respondent has the use of both hands

| 2 Respondent is unable to use [^left / right (dominant)] hand

| 3 Respondent is unable to use [^left / right (non-dominant)] hand

| 4 Respondent is unable to use either hand

*END FILTER*

*IF (Whether respondent is willing to have grip strength measured <> Yes) OR  
(Whether respondent is able to use both, one or neither hands = unable to use either)  
[(MMGSWil <> 1) OR (MMGSSta = 4)]*

```

| MMGSSTP @
| NURSE: Stop test, no handgrip measurement to be taken.
| Press <1> and <Enter> to continue with the next section.
| Range: 1..1

| ELSE

| MMGSINT @
| NURSE: Position the respondent correctly.
| Adjust gripometer to hand size by turning the lever and reset arrow at zero.
| Explain the procedure once again.
| Show the respondent how to do the test and let [^him / her] have a practice with one
| hand.
| Press <1> and <Enter> to continue.
| Range: 1..1

| IF Whether respondent is able to use both, one or neither hands = [both, unable to
use dominant] [MMGSSta = [1, 2]]

| MMGSN1
| NURSE: [^Left / Right (Non-dominant)] hand, first measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100

| END FILTER

| IF Whether respondent is able to use both, one or neither hands = [both, unable to
use non-dominant] [MMGSSta = [1, 3]]

| MMGSD1
| NURSE: [^Left / Right (Dominant)] hand, first measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100

| END FILTER

| IF Whether respondent is able to use both, one or neither hands = [both, unable to
use dominant] [MMGSSta = [1, 2]]

| MMGSN2
| NURSE: [^Left / Right (Non-dominant)] hand, second measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100

| END FILTER

| IF Whether respondent is able to use both, one or neither hands = [both, unable to
```

```

| use non-dominant] [MMGSSta = [1, 3]]
|
| MMGSD2
| NURSE: [^Left / Right (Dominant) hand, second measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100
|
| END FILTER
|
| IF Whether respondent is able to use both, one or neither hands = [both, unable to use dominant] [MMGSSta = [1, 2]]
|
| MMGSN3
| NURSE: [^Left / Right (Non-dominant) hand, third measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100
|
| END FILTER
|
| IF Whether respondent is able to use both, one or neither hands = [both, unable to use non-dominant] [MMGSSta = [1, 3]]
|
| MMGSD3
| NURSE: [^Left / Right (Dominant) hand, third measurement.
| Say: 'One, two, three, squeeze!'
| Enter the result to the nearest whole value.
| Range: 0..100
|
| END FILTER
|
| MMGSTP
| NURSE: Record respondent's position.
| 1 Standing without arm support
| 2 Sitting without arm support
| 3 Standing with arm support
| 4 Sitting with arm support
|
| [CHECKS N27 - N38]
|
| MMGSRES
| NURSE CHECK: Code one only.
| 1 All measures obtained
| 2 Some measures obtained
| 3 No measures obtained
|
| IF Number of grip strength measurements obtained = All [MMGSRes = 1]
|
| MMGSPRX @
| NURSE: Record any problems taking the grip strength measurement.

```

```
| | Press <Enter> if no problems encountered.  
| | Press <Alt S> to close the text window and save your answer.  
| | Open  
  
| | ELSE IF Number of grip strength measurements obtained = [some, none]  
| | [MMGSRes = [2, 3]]  
  
| | MMGSPR  
| | NURSE: Give reasons why no or only some measures were obtained.  
| | CODE ALL THAT APPLY.  
| | 1 Respondent refusal  
| | 2 Respondent in pain in hand / joints / muscles  
| | 3 Equipment failure  
| | 95 Other (specify at next question)  
| | [Multiple responses to MMGSPRB are recorded in variables MMGSPR1 to MMGSPR2]  
| | [Code maximum 4 out of 4 possible responses]  
  
| | IF Reasons why no or only some measures obtained = Other [MMGSPrB = 95]  
  
| | | MMGSPRO @  
| | | NURSE: Give details of why no or only some measures obtained.  
| | | String 40  
  
| | | END FILTER  
  
| | END FILTER  
  
END FILTER
```

## BLOOD SAMPLE MODULE

### BLINTRO @

NURSE: Now follows the Blood Sample module.

Press <1> and <Enter> to continue.

Range: 1..1

### CLOTB

NURSE: Explain the purpose and procedure for taking blood.

READ OUT: May I just check, do you have a clotting or bleeding disorder or are you currently on anti-coagulant drugs such as Warfarin or other blood thinning drugs?

(NURSE: Aspirin or other antiplatelet therapy is not a contraindication for blood sample.  
If in doubt press F9 to check list of anticoagulant / antiplatelet drugs).

HELP <F9> DO NOT TAKE A BLOOD SAMPLE IF RESPONDENT IS TAKING: Warfarin Sinthrome (Acenocoumarol) Phenindione Pradaxa (Dabigatran Etxilate) Xareloto (Rivaroxaban).

TAKE A BLOOD SAMPLE IF RESPONDENT IS TAKING: Aspirin (Caprin; Nu-Seals)

Flamasacard Clopidogrel (Plavix) Dipyridamole (Persantin, Persantin Retard, Asasantin Retard) Prasugrel (Efient) Eptifibatide (Inteligrin) Tirofiban (Aggrastat)

PRESS <Esc> TO CLOSE.

1 Yes

2 No

### [CHECK N39]

*IF Whether has a clotting disorder = No [ClotB = 2]*

#### FIT

May I just check, have you ever had a fit (including epileptic fit or convulsion)?

1 Yes

2 No

END FILTER

*IF Whether ever had a fit = No [Fit = 2]*

#### BSWILL

Would you be willing to have a blood sample taken?

1 Yes

2 No

[Don't Know and Refusal are not allowed]

*IF Whether is willing to give blood sample = Yes [BSWill = 1]*

*IF respondent's age < 80 [PAge < 80]*

#### FASTASK

NURSE: Did you ask the respondent to fast?

1 Yes

2 No, advised respondent was not safe to fast

||| 3 Did not contact respondent prior to visit  
 ||| *IF Whether respondent was asked to fast = [yes, did not contact respondent prior to visit] [FastAsk = [1, 3]]*  
 ||| **DATELEAT @**  
 ||| When did you last have anything to eat or drink (excluding water)?  
 ||| NURSE: Enter the date (dd / mm / yyyy).  
 ||| Enter the time at a later question.  
 ||| [Don't Know and Refusal are not allowed]  
 ||| *IF Date when last had anything to eat or drink = RESPONSE [DateLEat = RESPONSE]*  
 ||| **[CHECKS N40 – N41]**  
 ||| *IF Date when last had anything to eat or drink = Date at start of Blood module [DateLEat = BIDate]*  
 ||| **DLEATC1@**  
 ||| NURSE: It seems that the respondent last ate ^whenate. Is this correct?  
 ||| 1 Yes  
 ||| 2 No  
 ||| *IF Whether time when respondent last ate is correct = No [Dleatc1 = 2]*  
 ||| **DLEATC2@**  
 ||| NURSE: Please enter when the respondent last ate.  
 ||| 1 Today  
 ||| 2 Yesterday  
 ||| 3 Other answer (explain in a note)  
 ||| END FILTER  
 ||| *IF Date last ate = Date at start of Blood module AND Whether time when respondent last ate is correct = Yes) Or (Day last ate (if computer derivation incorrect) = Today) [(DateLEat = BIDate AND Dleatc1 = 1) Or (Dleatc2 = 1)]*  
 ||| **TIMELEAT @**  
 ||| NURSE: Enter the time in hours and minutes using the 24 hour clock (e.g. 17:30).  
 ||| [Don't Know and Refusal are not allowed]  
 ||| END FILTER  
 ||| *IF Time when last had anything to eat or drink = RESPONSE [TimeLEat = RESPONSE]*  
 ||| **[CHECK N42]**  
 ||| *IF Time when last had anything to eat or drink < = Time at start of*

```

| | | | | Blood module[TimeLEat <= BiTime]

| | | | | CHKDRK@
| | | | | Have you been drinking water during this time?
| | | | | 1 Yes
| | | | | 2 No
| | | | | [Don't Know and Refusal are not allowed]

| | | | | IF Time last ate <= Time at start of blood module [TimeLEat <= BiTime]

| | | | | TLEATC1@
| | | | | NURSE: It seems that the respondent last ate ^TimeAgo. Is this
| | | | | correct?
| | | | | 1 Yes
| | | | | 2 No
| | | | | [Don't Know and Refusal are not allowed]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (Nurse check when respondent last ate = No) OR (Time last ate > Time
| | | | | at start of blood module) [(Tleatc1 = 2) OR (TimeLEat > BiTime)]

| | | | | TLEATC2@
| | | | | NURSE: Did the respondent eat less than 5 hours ago?
| | | | | 1 Yes
| | | | | 2 No
| | | | | [Don't Know and Refusal are not allowed]

| | | | | IF (Whether last ate less than 5 hours ago = No) [Tleatc2 = 2]

| | | | | TLEATC3@
| | | | | NURSE: Did the respondent eat less than 8 hours ago?
| | | | | 1 Yes
| | | | | 2 No
| | | | | [Don't Know and Refusal are not allowed]

| | | | | END FILTER

| | | | | END FILTER

| | | | | FASTELIG
| | | | | Eligible for a fasting sample? - based on when and what last ate
| | | | | 1 Yes
| | | | | 2 No

| | | | | IF ((Time last ate is more than 5 hours < Time at start of blood module)
| | | | | AND (Nurse check when respondent last ate = Yes)) OR (Whether last ate
| | | | | less than 5 hours ago = No) [((TimeLEat < BiTime) AND (Tleatc1 =
```



Range: 1..1

**CODE03 @**

NURSE: Ask the respondent to read and initial 'Blood Sample Consent part 1', on page 3 of the Consent Booklet. Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet (if not done already).

Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5 of the Consent Booklet.

- Circle consent code **03** on front of the Consent Booklet.

Press <1> and <Enter> to continue.

*IF Whether respondent registered with GP <> RESPONSE*

[GPRegB <> RESPONSE]

**GPSAM @**

NURSE CHECK:

- 1 Respondent registered with GP
- 2 Respondent not registered with GP

END FILTER

*IF (Whether respondent registered with GP = Yes) OR (Whether respondent registered with GP = Registered) [(GPRegB = 1) OR (GPSam = 1)]*

**SENDSAMF @**

May we send the results of your blood sample analysis to your GP?

- 1 Yes
- 2 No

[Don't Know and Refusal are not allowed]

*IF Whether results of blood sample analysis may be sent to GP = Yes*

[SendSam = 1]

**BSSIGN @**

NURSE: Ask the respondent to read and initial 'Blood Sample Consent part 2', on page 3 of the Consent Booklet. Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet (if not done already).

Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5 of the Consent Booklet.

- Circle consent code **05** on front of the Consent Booklet.

Press <1> and <Enter> to continue.

*ELSE IF Whether results of blood sample analysis may be sent to GP = No*  
[SendSam = 2]

**SENSAM @**

Why do you not want your blood sample results sent to your GP?

- 1 Hardly / never sees GP

```

    | | | | 2 GP recently took blood sample
    | | | | 3 Does not want to bother GP
    | | | | 4 Other
    | | | | [Code maximum 4 out of 4 possible responses]
    | | |
    | | | | IF Reason why respondent does not want blood results sent to their GP = Other [SenSam = 4])
    | | |
    | | | | OTHSAM @
    | | | | NURSE: Give full details of reason(s) for not wanting results sent to GP.
    | | | | String 140
    | | |
    | | | | END FILTER
    | | |
    | | | | END FILTER
    | | |
    | | | | END FILTER

    | | | | IF (Whether respondent registered with GP = Not registered) OR (Whether results of blood sample analysis may be sent to GP = No) [(GPSam = 2) OR (SendSam = 2)]
    | | |
    | | | | CODE06 @
    | | | | NURSE: Circle consent code 06 on front of the Consent Booklet.
    | | | | Press <1> and <Enter> to continue.
    | | | | Range: 1..1
    | | |
    | | | | END FILTER

    | | | | CONSTORB @
    | | | | May we have your consent to store any remaining blood for future analysis?
    | | | | 1 Storage consent given
    | | | | 2 Consent refused
    | | | | [Don't Know and Refusal are not allowed]

    | | | | IF Whether consent granted for storing blood for future analysis = Yes [ConStorB = 1]
    | | |
    | | | | CODE09 @
    | | | | NURSE: Ask the respondent to read and initial 'Blood Sample Consent part 3', on page 3 of the Consent Booklet. Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet (if not done already).
    | | | | Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5 of the Consent Booklet.
    | | | | - Circle consent code 09 on front of the Consent Booklet.
    | | | | Press <1> and <Enter> to continue.

    | | | | CONSDNA @
    | | | | There is currently interest in genetic tests which use the DNA contained in blood and you were given a separate leaflet by the interviewer explaining this.

```

Do you have any questions about this?  
NURSE: Answer any questions by referring to the leaflet.  
READ OUT: May we have your consent to extract DNA from your sample and store this DNA for future analysis?  
1 DNA consent given  
2 Consent refused  
[Don't Know and Refusal are not allowed]

*IF Whether consent granted for extracting and storing DNA for future analysis = Yes [ConsDNA = 1]*

**CODE11 @**

NURSE: Ask the respondent to read and initial 'Genetics Consent', on page 4 of the Consent Booklet. Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet (if not done already).  
Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5 of the Consent Booklet.  
- Circle consent code **11** on front of the Consent Booklet.  
Press <1> and <Enter> to continue.

*ELSE IF Whether consent granted for extracting and storing DNA for future analysis = No [ConsDNA = 2]*

**CODE12 @**

NURSE: Circle consent code **12** on front of the Consent Booklet.  
Press <1> and <Enter> to continue.  
Range: 1..1

*If not eligible for DNA sample collection*

**CODE12B**

NURSE: The respondent is not in the refreshment sample. Therefore they are not eligible for DNA sample collection. Circle consent code **12** on front of the Consent Booklet.  
Press <1> and <Enter> to continue.

END FILTER

*ELSE IF Whether consent granted for storing blood for future analysis = No [ConStorB = 2]*

**CODE10 @**

NURSE: Circle consent code **10** on front of the Consent Booklet.  
Press <1> and <Enter> to continue.  
Range: 1..1

END FILTER

**TAKESA1 @**

|| | NURSE:  
 || | - Check that the respondent has initialised all applicable boxes.  
 || | Take the samples in order of priority:  
 || | First the 1.8ml citrate tube (blue)  
 || | then the 6ml plain tube (red)  
 || | [^BLANK / then the 2ml fluoride tube (grey)]  
 || | [^then the 2ml EDTA tube (light purple) / then two 4ml EDTA tubes (dark purple)].  
 || | Press <1> and <Enter> to continue.  
 || | Range: 1..1

**TAKESA2 @**  
 NURSE:  
 - Check that you have the correct sheet of barcode labels for the respondent.  
 - Check with respondent their name and date of birth on the label sheet.  
 - Stick one barcode label on each tube.  
 Press <1> and <Enter> to continue.  
 Range: 1..1

**SAMPF1 @**  
 NURSE: Code if the plain **red** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

**SAMPF2 @**  
 NURSE: Code if the citrate **blue** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

*IF Whether eligible for a fasting sample based on when and what last ate = Yes  
 [FastElig = 1]*

**SAMPF3 @**  
 NURSE: Code if the fluoride **grey** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

END FILTER

**SAMPF4 @**  
 NURSE: Code if the 2ml EDTA **LIGHT purple** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

*IF Whether consent granted for extracting and storing DNA for future analysis  
 = Yes [ConsDNA = 1]*

**SAMPF5 @**  
 NURSE: Code if the first EDTA **DARK purple** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

**SAMPF6 @**  
 NURSE: Code if the second EDTA **DARK purple** tube was filled (include partially filled tube):  
 1 Yes  
 2 No  
 [Don't Know and Refusal are not allowed]

END FILTER

*[Whether a blood sample was obtained is computed and recorded in variable SampTak.*

*Variable SampTak indicates that a blood sample was obtained (value 1)*

*IF ((SAMPF1 = 1) OR (SAMPF2 = 1) OR (SAMPF3 = 1) OR (SAMPF4 = 1) OR (SAMPF5 = 1) OR (SAMPF6 = 1))]*

*IF Blood sample outcome (derived) = Sample obtained [SampTak = 1)]*

**SAMPARM @**  
 NURSE: Code from which arm the blood was taken.  
 1 Right arm  
 2 Left arm  
 [Don't Know and Refusal are not allowed]

**SAMDIF**  
 NURSE: Record any problems in taking blood sample.  
 CODE ALL THAT APPLY.

- 1 No problem
- 2 Incomplete sample
- 3 Collapsing / poor veins
- 4 Second attempt necessary
- 5 Some blood obtained, but respondent felt faint/fainted
- 6 Unable to use tourniquet
- 7 Other (specify at next question)

*[Multiple responses to SAMDIFC are recorded in variables SAMDIF1 to SAMDIF4]*

*[Code maximum 6 out of 7 possible responses]*

**[CHECKS N43 - N44]**

*IF (Problems taking blood sample = Other [SamDifC = 7]*

**OTHBDIF @**  
 NURSE: Give full details of other problem(s) in taking blood sample.  
 String 140

```

    ||| END FILTER

    ||| IF Whether eligible for a fasting sample based on when and what last ate = Yes  

    ||| [FastElig = 1]

    ||| BREAKFAST @
    ||| NURSE: Encourage the respondent to have something to eat now, [^he / she]  

    ||| should not feel faint for the physical performance measures.  

    ||| Press <1> and <Enter> to continue.  

    ||| Range: 1..1

    ||| END FILTER

    ||| SNDRSAM @
    ||| Would you like to be sent the results of your blood sample analysis?  

    ||| 1 Yes  

    ||| 2 No  

    ||| [Don't Know and Refusal are not allowed]

    ||| IF Whether respondent would like to be sent the results of the analysis = Yes  

    ||| [SnDrSam = 1]

    ||| CODE07 @
    ||| NURSE: Circle consent code 07 on front of the Consent Booklet.  

    ||| Press <1> and <Enter> to continue.  

    ||| Range: 1..1

    ||| ELSE IF Whether respondent would like to be sent the results of the analysis = No  

    ||| [SnDrSam = 2]

    ||| CODE08 @
    ||| NURSE: Circle consent code 08 on front of the Consent Booklet.  

    ||| Press <1> and <Enter> to continue.  

    ||| Range: 1..1

    ||| END FILTER

    ||| ELSE IF Blood sample outcome (derived) = Sample not obtained [SampTak = 2]

    ||| NOBSM
    ||| NURSE: Code reason(s) no blood obtained.  

    ||| CODE ALL THAT APPLY.
    ||| 1 No suitable or no palpable vein / collapsed veins  

    ||| 2 Respondent was too anxious / nervous  

    ||| 3 Respondent felt faint / fainted  

    ||| 4 Other
    ||| [Multiple responses to NOBSM are recorded in variables NOBSM1 to NOBSM2]
    ||| [Code maximum 4 out of 4 possible responses]

    ||| IF (Reasons for not obtaining blood sample = Other) [NoBSM = 4]

```

```

| | | | OTHNOBSM @
| | | | NURSE: Give full details of reason(s) no blood obtained.
| | | | String 140
| | | | END FILTER

| | | | CODE10A @
| | | | NURSE: Cross out consent codes 03, 05, 07, 09, and 11 if already circled on
| | | | the front of the Consent Booklet.
| | | | Replace with consent codes 04, 06, 08, 10, and 12 on the front of the Consent
| | | | Booklet.
| | | | Press <1> and <Enter> to continue.
| | | | Range: 1..1
| | | | END FILTER

| | | | ELSE IF Whether is willing to give blood sample = No [BSWill = 2]

| | | | REFBSC
| | | | NURSE: Record why blood sample refused.
| | | | CODE ALL THAT APPLY.
| | | | 1 Previous difficulties with venepuncture
| | | | 2 Dislike / fear of needles
| | | | 3 Respondent recently had blood test / health check
| | | | 4 Refused because of current illness
| | | | 5 Worried about HIV or AIDS
| | | | 6 Other
| | | | [Multiple responses to REFBSC are recorded in variables REFBSC1 to
| | | | REFBSC3]
| | | | [Code maximum 6 out of 6 possible responses]

| | | | IF (Reason why blood sample refused = Other [RefBSC = 6]

| | | | OTHREFBS @
| | | | NURSE: Give full details of other reason(s) for refusing blood sample.
| | | | String 135
| | | | END FILTER

| | | | END FILTER

| | | | END FILTER

| | | | IF((Whether has a clotting disorder = [Yes, NONRESPONSE]) OR (Whether ever had a
| | | | fit = [Yes, NONRESPONSE]) OR (Whether is willing to give blood sample = No))
| | | | [(ClotB = [1, NONRESPONSE]) OR (Fit = [1, NONRESPONSE]) OR (BSWill = 2))]

| | | | NOCODES @
| | | | NURSE: No blood to be taken.
| | | | Circle consent codes 04, 06, 08, 10, and 12 on the front of the Consent Booklet.

```

```
| Press <1> and <Enter> to continue.  
| Range: 1..1  
|  
END FILTER
```

## **VENEPUNCTURE CHECKLIST**

### **VPSYS @**

NURSE: Which system did you use to take blood?

- 1 Vacutainer needle
- 2 Butterfly needle

### **VPHAND @**

NURSE: Was the respondent left handed or right handed?

- 1 Left handed
- 2 Right handed

### **VPARM @**

NURSE: Which arm did you use to take blood?

- 1 The right arm
- 2 The left arm
- 3 Both arms

### **VPSKIN @**

NURSE: Code the skin condition of the arm used.

- 1 Skin intact
- 2 Skin not intact

### **VPALCO @**

NURSE: Did you use an alcohol wipe?

- 1 Yes
- 2 No - water-based wipe used
- 3 No wipe used

### **VPALCONO @**

NURSE: Why was alcohol wipe not used?

OPEN

### **VPSAM @**

NURSE: Code the number of attempts made to take blood.

- 1 Sample taken on first attempt
- 2 Sample taken on second attempt
- 3 Both attempts failed

### **VPPRESS @**

NURSE: Code who applied pressure to the puncture site.

CODE ALL THAT APPLY.

- 1 Nurse,

2 Respondent  
3 Partner or spouse

**VPSENS @**

NURSE: Was the respondent sensitive to the tape or plaster?

- Sensitive to tape/plaster
- Not sensitive to tape/plaster
- Did not check

**VPPROB @**

NURSE: Was there any abnormality noted after 5 minutes?

Please remember to recheck the site after completion of the blood sample module.  
CODE ALL THAT APPLY.

- 1 Sensory deficit
- 2 Haematoma
- 3 Swelling
- 4 Other (describe at next question)
- 5 None

*IF VpProb=OTHER THEN*

| **VPOTHER @**

| NURSE: Record the details of the other abnormality fully.

| STRING135

|

| *IF VPPROB = NOT none THEN*

|

| **VPDETAIL @**

| NURSE: You have coded that an abnormality was noted after 5 minutes.

| Please record the action you took when you noticed this.

| OPEN

|

**VPCHECK @**

NURSE: Did you re-check the puncture site after completion of the blood sample module?

- 1 Yes, site was re-checked
- 2 No, site was not re-checked

## **STANDING HEIGHT MODULE**

### **HGT1INT @**

NURSE: Now follows the Standing Height Measurement module.

Press <1> and <Enter> to continue.

Range: 1..1

### **HTINTRO @**

I would now like to measure your height.

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

### **RESPHTS**

NURSE: Measure standing height and code below.

Include 'disguised' refusals such as 'It will take too long', 'I have to go out' etc. at code 2:

Height refused.

- 1 Height measured
- 2 Height refused
- 3 Height attempted, not obtained
- 4 Height not attempted

[Don't know and refusal are not allowed]

*IF Whether standing height measurement was attempted or obtained = Measured*

*[RespHts = 1]*

### **HEIGHT**

NURSE: Record standing height (in centimetres).

Please record height with one decimal digit, using the full stop as decimal point.

[Don't know and refusal are not allowed]

### **[CHECKS N45 - N46]**

### **RELHITE**

NURSE: Code one only.

1 No problems experienced, reliable height measurement obtained

Problems experienced - measurement likely to be:

- 2 Reliable
- 3 Unreliable

*IF Reliability of standing height measurement according to nurse = Unreliable*

*[RelHite = 3]*

### **HINREL**

NURSE: What caused the height measurement to be unreliable?

- 1 Hairstyle or wig
- 2 Turban or other religious headgear
- 3 Respondent stooped
- 4 Respondent would not stand still
- 5 Respondent wore shoes
- 6 Other, please specify

| | | *IF Reason for standing height measurement to be unreliable = Other [HiNRel = 7]*

| | | **OHINREL @**

| | | NURSE: Please specify what caused unreliable height measurement.  
| | | String 60

| | | END FILTER

| | | END FILTER

| | | **MBOOKHT @**

| | | NURSE: Enter this height measurement on [^Name of respondent]'s Measurement Record Card.  
| | | Height: [^Standing height - centimetres] cm or [^Standing height - feet] feet [^Standing height - inches] inches.  
| | | 1 Continue

| | | *ELSE IF Whether standing height measurement was attempted or obtained = Refused [RespHts = 2]*

| | | **RESNHI**

| | | NURSE: Give reasons for refusal.

- | | | 1 Cannot see point / Height already known / Doctor has measurement
- | | | 2 Too busy / Taken too long already / No time
- | | | 3 Respondent too ill / frail / tired
- | | | 4 Considered intrusive information
- | | | 5 Respondent too anxious / nervous / shy / embarrassed
- | | | 6 Refused (no other reason given)
- | | | 7 Other

| | | [Don't Know and Refusal are not allowed]

| | | *ELSE IF Whether standing height measurement was attempted or obtained = [attempted but not obtained, not attempted] [RespHts = [3 , 4]]*

| | | **NOHTBC**

| | | NURSE: Code reason for not obtaining height.

| | | CODE ALL THAT APPLY.

- | | | 1 Respondent is unsteady on feet
- | | | 2 Respondent cannot stand upright / too stooped
- | | | 3 Respondent is chairbound
- | | | 4 Confined to bed
- | | | 5 Respondent unable to remove shoes
- | | | 6 Ill or in pain
- | | | 7 Stadiometer faulty or not available
- | | | 8 Other - specify

| | | [Don't Know and Refusal are not allowed]

| | | **[Multiple responses to NOHTBC are recorded in variables NOHTBC1 to NOHTBC4]**

| | | **[Code maximum 7 out of 8 possible responses]**

| | | *IF (Reason for not obtaining standing height measurement = Other [NoHtBC = 8]*

```

| | | NOHITCO @
| | | NURSE: Please specify other reason.
| | | String 60
| | |
| | | END FILTER
| | END FILTER

```

*IF Whether standing height measurement was attempted or obtained = [Refused, attempted but not obtained, not attempted] [RespHts = [2, 3, 4]]*

```

| | EHTCH
| | NURSE: Ask the respondent for an estimated height.
| | Will it be given in metres or in feet and inches?
| | If respondent doesn't know height use <Ctrl K>,
| | If respondent isn't willing to give height use <Ctrl R>.
| | 1 Metres
| | 2 Feet and inches

```

*IF Whether estimated height will be in metric or imperial measures = metres [EHtCh = 1]*

```

| | EHTM
| | NURSE: Please record estimated height in metres.

```

*ELSE IF Whether estimated height will be in metric or imperial measures = feet and inches [EHtCh = 2]*

```

| | EHTFT
| | NURSE: Please record estimated height.
| | Enter feet here.
| | Range: 0..7

```

```

| | EHTIN
| | NURSE: Please record estimated height.
| | Enter inches here.
| | Range: 0..11

```

```

| | END FILTER
| | END FILTER

```

**[Final measured or estimated height is recorded in variable EstHt as follows:**

```

IF (Height = RESPONSE) THEN EstHt = Height
ELSE IF (EHtFt = RESPONSE) AND (EHtIn = RESPONSE) THEN
    EstHt = ((EHtFt * 12) + EHtIn) * 2.54
ELSE IF (EHtFt = RESPONSE) AND (EHtIn <> RESPONSE) THEN
    EstHt = EHtFt * 30.48
ELSE IF (EHtm = RESPONSE) THEN EstHt = EHtm * 100
ELSE EstHt = EMPTY]

```

**[CHECK N47]**

## WEIGHT MODULE

### WGTINT @

NURSE: Now follows the Weight Measurement module.

Press <1> and <Enter> to continue.

Range: 1..1

### RESPWTS

NURSE: Measure weight and code.

If the respondent weighs more than 130 kg (20 ½ stones) do not weigh.

Code as weight not attempted.

Include 'disguised' refusals such as 'It will take too long', 'I have to go out' etc. at code 2:

Weight refused.

- 1 Weight measured
- 2 Weight refused
- 3 Weight attempted, not obtained
- 4 Weight not attempted

[Don't know and refusal are not allowed]

*IF Whether weight measurement was attempted or obtained = Measured*

*[RespWts = 1]*

### WEIGHT

NURSE: Record weight (in kilograms).

Record weight with one decimal digit, using the full stop as decimal point.

[Don't know and refusal are not allowed]

### FLOORC

NURSE CODE: Scales placed on?

- 1 Uneven floor
- 2 Carpet
- 3 Neither

### RELWAIT

NURSE: Code one only.

1 No problems experienced, reliable weight measurement obtained

Problems arised, measurement likely to be:

- 2 Reliable
- 3 Unreliable

*[Responses to RELWAITB are recorded in variable RELWAIT]*

### MBOOKWT @

NURSE: Enter the weight measurement on [^Name of respondent]'s Measurement

Record Card.

Weight: [^Weight - kg] kg or [^Weight - stone] stones [^Weight - pounds] pounds.

If weight looks wrong, go back to 'Weight' and re-weigh.

- 1 Continue

*ELSE IF Whether weight measurement was attempted or obtained = [Refused],*

*attempted but not obtained, not attempted] [RespWts = [2 , 3, 4]]*

| *IF Whether weight measurement was attempted or obtained = Refused [RespWts = 2]*

| **RESNWT**

| NURSE: Give reasons for refusal.

- | 1 Cannot see point / Weight already known / Doctor has measurement
- | 2 Too busy / Taken long enough already / No time
- | 3 Respondent too ill / frail / tired
- | 4 Considered intrusive information
- | 5 Respondent too anxious / nervous / shy / embarrassed
- | 6 Refused (no other reason given)
- | 7 Other

| [Don't Know and Refusal are not allowed]

| *ELSE IF Whether weight measurement was attempted or obtained = [attempted but not obtained, not attempted] [RespWts = [3 , 4]]*

| **NOWTBC**

| NURSE: Code reason for not obtaining weight.

| CODE ALL THAT APPLY.

- | 1 Respondent is unsteady on feet
- | 2 Respondent cannot stand upright
- | 3 Respondent is chairbound
- | 4 Confined to bed
- | 5 Respondent unable to remove shoes
- | 6 Respondent weighs more than 130 kg
- | 7 Ill or in pain
- | 8 Scales not working
- | 9 Other - specify

| [Don't Know and Refusal are not allowed]

| **[Multiple responses to NOWTBC are recorded in variables NOWTBC1 to NOWTBC4]**

| **[Code maximum 8 out of 9 possible responses]**

| *IF Reason for not obtaining weight measurement = Other [NoWtBC = 9]*

| **NOWATCO @**

| NURSE: Please specify other reason.

| String 60

| END FILTER

| END FILTER

| **EWTCH**

| NURSE: Ask the respondent for an estimated weight.

| Will it be given in kilograms or in stones and pounds?

| If respondent doesn't know weight use <Ctrl K>.

| If respondent isn't willing to give weight use <Ctrl R>.

| 1 Kilograms

```

| 2 Stones and pounds
|
| IF Whether estimated weight will be in metric or imperial measures = kilograms
| [EWtCh = 1]
|
| EWTKG
| NURSE: Please record estimated weight in kilograms.
|
| ELSE IF Whether estimated weight will be in metric or imperial measures = stones
| and pounds [EWtCh = 2]
|
| EWTST
| NURSE: Please record estimated weight. Enter stones here.
| (Enter pounds at the next question.)
| Range: 0..32
|
| EWTL
| NURSE: Please record estimated weight. Enter pounds here.
| Range: 0..13
|
| END FILTER
|
END FILTER

```

*[Final measured or estimated weight is recorded in variable EstWt as follows:*

*IF (Weight = RESPONSE) THEN EstWt = Weight*

*ELSE IF (EWtSt = RESPONSE) AND (EWtL = RESPONSE) THEN*

*EstWt = ROUND(((EWtSt \* 14) + EWtL) \* 4.54) \* 0.1*

*ELSE IF (EWtSt = RESPONSE) AND (EWtL <> RESPONSE) THEN*

*EstWt = ROUND(EWtSt \* 63.56) \* 0.1*

*ELSE IF (EWtkg = RESPONSE) THEN EstWt = EWtkg*

*ELSE EstWt = EMPTY]*

**[CHECKS N52 - N56]**

## WAIST AND HIP CIRCUMFERENCE MODULE

### WHMOD @

NURSE: Now follows the Waist Measurement.

Press <1> and <Enter> to continue.

Range: 1..1

### WHINTRO<sup>4</sup>

I would now like to measure your waist.

NURSE CODE:

- 1 Respondent agrees to have waist measured
- 2 Respondent refuses to have waist measured
- 3 Unable to measure waist for reason other than refusal

*IF Whether consents to waist measurement = Agree [WHIntro = 1]*

REPEAT UP TO THREE TIMES [LOOP FOR Loop:= 1 TO 3]

*IF (Waist measurement order = [first, second]) OR ((Waist measurement order = third) AND ((First waist measurement <> not obtained) AND (Second waist measurement <> not obtained) AND (Absolute difference between first and second waist measurements > 3cm)))  
[(PLoop = [1, 2]) OR ((PLoop = 3) AND ((Waist1 <> 999.9) AND (Waist2 <> 999.9) AND (ABS (Waist1 - Waist2) > 3)))*

#### WAIST

NURSE: Measure the waist to the nearest mm.

Enter the [**first / second / third**] waist measurement in centimetres.

(Remember to include the decimal point.)

If measurement not obtained, enter '999.9'.

[Don't know and refusal are not allowed]

**[Responses to WAIST are recorded in variables WAIST1 to WAIST3]**

**[CHECK N57]**

END FILTER

*IF (First waist measurement = not obtained) OR (Second waist measurement = not obtained) OR (First hip measurement = not obtained) OR (Second hip measurement = not obtained)*

*[(Waist1 = 999.9) OR (Waist2 = 999.9) OR (Hip1 = 999.9) OR (Hip2 = 999.9)]*

#### YNOWH

NURSE: Enter reason for not getting both measurements.

- 1 Both measurements refused
- 2 Attempted but not obtained
- 3 Measurement not attempted

<sup>4</sup> See variable whwill in the dataset

END FILTER

**[Whether all waist measurements have been obtained is computed and recorded in variable RespWH]**

*IF (Response to waist measurement = [Only one obtained, refused, not attempted]) OR (Reason why none or only some measurements were obtained = Both measurements refused) [(RespWH = [2, 3, 4]) OR (YNoWH = 1)]*

**WHPNABM**

NURSE: Give reason(s) [^for refusal / why unable / for not obtaining measurement / for not attempting / why only one measurement obtained].

CODE ALL THAT APPLY.

- 1 Respondent is chairbound
- 2 Respondent is confined to bed
- 3 Respondent is too stooped
- 4 Respondent did not understand the procedure
- 5 Respondent is embarrassed / sensitive about their size
- 6 No time / busy / already spent enough time on this survey
- 95 Other (specify at next question)

**[Multiple responses to WHPNABM are recorded in variables WHPNAB1 to WHPNAB3]**

**[Code maximum 7 out of 7 possible responses]**

*IF (Reason for not obtaining waist and hip measurements = Other [WHPNABM = 95])*

**OTHWH @**

NURSE: Give full details of 'other' reason(s) for not getting full waist measurement  
String 140

END FILTER

END FILTER

*IF (First waist measurement <> [not obtained, EMPTY]) OR (Second waist measurement <> [not obtained, EMPTY])*

*[(Waist1 <> [999.9, EMPTY]) OR (Waist2 <> [999.9, EMPTY])]*

**WJREL**

NURSE: Record any problems with waist measurement:

- 1 No problems experienced, reliable waist measurement
- 2 Problems experienced - waist measurement likely to be reliable
- 3 Problems experienced - waist measurement likely to be slightly unreliable
- 4 Problems experienced - waist measurement likely to be unreliable

*IF Whether any problems with waist measurement = some problems experienced*  
*[WJRel = [2, 3, 4]]*

**PROBWJ**

NURSE: Record whether problems experienced are likely to increase or decrease

```
| | the waist measurement.  
| | 1 Increases measurement  
| | 2 Decreases measurement  
|  
| END FILTER  
|  
END FILTER  
|  
IF Response to waist measurement = [Both obtained, Only one obtained]  
[RespWH = [1, 2]]  
|  
| WHRES @  
| NURSE: Offer to write results of waist measurement, where applicable,  
| onto respondent's Measurement Record Card.  
|  
| Waist  
| [^Waist1] cms inches  
| [^Waist2] cms inches  
|  
| Press <1> and <Enter> to continue.  
| String 1  
|  
END FILTER
```

## LUNG FUNCTION MODULE

### LFINT @

NURSE: Now follows the Lung Function module.

The next part of my visit is a lung function test. This will involve you breathing out as hard and as fast as you can for as long as you can into a tube. Before I explain more about the test, I need to ask you a couple of questions to make sure it is safe for you to do.

Press <1> and <Enter> to continue.

Range: 1..1

### HASURG

Can I check, have you had abdominal or chest surgery in the past three months?

- 1 Yes
- 2 No

*IF Whether respondent has had abdominal or chest surgery in last 3 months = No [HaSurg = 2]*

### EYESURG

Do you have detached retina or have you had eye or ear surgery in the past 3 months?

- 1 Yes
- 2 No

*IF Whether respondent has had eye surgery in the last 3 months = No [EyeSurg = 2]*

*| | IF EyeSurg=No AND age>15*

### LFHRT

Have you had a heart attack in the past 3 months?

- 1 Yes
- 2 No

*| | IF HASURG = No*

### HASTRO

Have you been admitted to hospital for a heart complaint in the past month?

- 1 Yes
- 2 No

### LFTB

Are you currently taking any medications for the treatment of tuberculosis?

- 1 Yes
- 2 No

*| | IF (Whether respondent has had abdominal or chest surgery in last 3 weeks = Yes)*

*| | OR (Whether respondent has had eye surgery in the last 4 weeks = Yes) OR*

*| | (Whether respondent admitted to hospital for heart complaint in last 6 weeks = Yes)*

*| | [(HaSurg = 1) OR (EyeSurg = 1) OR (HaStro = 1)]*

### NOLUNG

NURSE: This respondent is not eligible for a lung function test.  
Explain to the respondent that it will not be safe for them to do the lung function test.  
Press <1> and <Enter> to continue.

*ELSE IF (Whether respondent has had abdominal or chest surgery in last 3 weeks = No) AND (Whether respondent has had eye surgery in the last 4 weeks <> Yes) AND (Whether respondent admitted to hospital for heart complaint in last 6 weeks <> Yes) (HaSurg = 2) AND (EyeSurg <> 1) AND (HaStro <> 1)*

#### **LFWILL**

A lung function test tells us how well people's lungs are working. It measures the amount of air you can blow out of your lungs and how fast you can blow the air out. On its own this test can't tell me if there are any problems with your lungs so if you have any concerns about your lungs you should talk to your GP.  
To do the test you will need to blow out into a tube as hard and as fast as you can for as long as you can. To get an accurate test you will need to do more than one blow. Would you be willing to have your lung function measured?

1 Yes, agrees  
2 No, refuses  
3 Yes but unable to take lung function measurement for reason other than refusal

*IF LFWill = Yes but unable to take lung function measurement for reason other than refusal*

#### **NOATTLF**

NURSE: Record why unable to take reading.  
CODE ALL THAT APPLY.

1 Respondent is breathless  
2 Respondent is unwell  
3 Respondent upset/anxious/nervous  
9 Other reason (PLEASE SPECIFY)

*IF NOATTLF= other reason*

#### **NOATTO@**

NURSE: Give other reason why the respondent did not attempt / refused lung function test.  
STRING 250

*IF LFWill=1 AND Smoke=1-3 THEN*

#### **LFSMOK**

Can I just check, have you smoked in the last 24 hours? This may have been a cigarette, cigar or pipe

1 Yes  
2 No

*IF LFSMOK=Yes THEN*

#### **LFSMHR**

How many hours ago did you last smoke?

|| NURSE: Code the number of hours. If less than one hour, code 0.  
 || Range : 0..24

|| **INHALER**  
 || (Can I just check), have you used an inhaler, puffer or any medication for your  
 || breathing in the last 24 hours?  
 || 1 Yes  
 || 2 No

|| *IF Whether used an inhaler / puffer in last 24 hours = Yes [Inhaler = 1]*

|| **INHALHRS**  
 || How many hours ago did you use it?  
 || NURSE: Enter number of hours. If less than one hour, code 0.  
 || Range: 0..24  
 || **[Responses to INHALHRS are recorded in variable INHALHR]**

|| *IF Whether respondent admitted to hospital for heart complaint in last 6 weeks = No [HaStro = 2]*

|| **CHESTINF**  
 || In the past three weeks, have you had any respiratory infections such as influenza,  
 || pneumonia, bronchitis or a severe cold?  
 || 1 Yes  
 || 2 No  
 || **[Responses to CHESTINF are recorded in variable CHESTIN]**

||  
 || END FILTER

|| *IF LFRESP = NONE*  
 || **LFCODE3 @**  
 || NURSE: Circle consent code 14 on front of the Consent Booklet.  
 || Press <1> and <Enter> to continue.

|| *IF NOATLF = RESPONSE*  
 || **LFCODE5 @**  
 || NURSE: Circle consent code 14 on front of the Consent Booklet.  
 || Press <1> and <Enter> to continue.

|| || **ELSE**

|| || **LFPRAC@**  
 || || NURSE: Launch the spirometry program and Explain the manoeuvre to the  
 || || respondent. Point out the following:  
 || || Tight seal round the spirette  
 || || Breathe in as deeply as possible  
 || || Straight away blast the air out as hard as they can and as fast as they can and keep  
 || || going for as long as possible  
 || || Need a few blows, will guide them through  
 || || Demonstrate the blow to the respondent

/ | Give the spirometer to the respondent. Ask them to breath normally.  
 / | PRESS <1> AND <Enter> TO LAUNCH THE SPIROMETRY SOFTWARE.  
 / | 1 Yes  
 / | 2 No  
 / |  
 / | REPEAT THREE TIMES [LOOP FOR *Idx*:= 1 TO 3]  
 / |  
 / | *IF (First FVC reading <> 9.95) AND (Whether no readings obtained = No)*  
 / | *[(FVC1 <> 9.95) AND (NoRead = 2)]*  
 / |  
 / | **FVC**  
 / | Enter FVC reading. If no reading obtained enter '0'.  
 / | If you are not going to obtain any readings at all enter '9.95'.  
 / | **[Highest technically satisfactory FVC reading is recorded in variable HTFVC]**  
 / |  
 / | **[ Whether no LF readings were obtained is computed and recorded in variable NoRead]**  
 / |  
 / | **[CHECKS N68 - N69]**  
 / |  
 / | *IF FVC reading (litres) < 9.95 [FVC < 9.95]*  
 / |  
 / | **FEV**  
 / | Enter FEV reading. If no reading obtained enter '0'.  
 / | **[Highest technically satisfactory FEV reading is recorded in variable HTFEV]**  
 / |  
 / | **[CHECKS N70 - N74]**  
 / |  
 / | **PEF**  
 / | Enter PEF reading. If no reading obtained enter '0'.  
 / | Range: 0..995  
 / | **[Highest technically satisfactory PEF reading is recorded in variable HTPEF]**  
 / |  
 / | **[CHECKS N75 - N77]**  
 / |  
 / | **PCFEV**  
 / | Enter @IFEV1%@I reading.  
 / | If no reading obtained enter '0'.  
 / | Range: 0..100  
 / |  
 / | **PCFVC**  
 / | Enter @IFVC1%@I reading.  
 / | If no reading obtained enter '0'.  
 / | Range: 0..100  
 / |  
 / | **PCPEF**  
 / | Enter @IPEF1%@I reading.

```

    | | | | If no reading obtained enter '0'."  

    | | | | Range: 0..100  

    | | |  

    | | | END OF LOOP  

    | |  

QUALITY  

    | | Derived: Outcome from lung function software (A - F).  

    | | Testing: Enter quality level letter.  

    | | STRING 1  

    | |  

IF Quality= C OR D OR F  

QUALCDF@  

    | | Nurse: Explain the reason for the session quality for this respondent.  

    | | STRING 200  

    | |  

IF Other IN QualCDF THEN  

QUALOTH@  

    | | NURSE: Please give other reason.  

    | | STRING 250  

    | | ENDIF  

    | |  

IF QUALITY= C OR D OR F  

CDFCOM1@  

    | | NURSE: Are there any comments which need to be noted about this respondent's  

    | | lung function test.  

    | | 1 Yes  

    | | 2 No  

    | |  

IF Quality= A or B THEN  

QUALAB@  

    | | NURSE: Are there any comments which need to be noted about this respondent's  

    | | lung function test.  

    | | 1 Yes  

    | | 2 No  

    | |  

IF QualAB = Yes THEN  

QUALABOT@  

    | | NURSE: Please note comment about this respondent's spirometry test.  

    | | STRING 250  

    | |  

NULLLF@  

    | | NURSE: Record why you were unable to take any readings.  

    | | STRING 200  

    | |  

IF (Whether willing to have lung function measured = Yes) AND (How many technically  

correct blows were obtained = [All, some]) [(LFWill = 1) AND (LFResp =[1, 2])]  

    | |  

IF Whether respondent registered with GP <> RESPONSE  

[GPRegB <> RESPONSE]

```

```

| | | LFSAM @
| | | NURSE: If not already asked: (Can I just check) are you registered with a GP?
| | |   1 Respondent registered with GP
| | |   2 Respondent not registered with GP

| | | END FILTER

| | | IF (Whether or not satisfactory blow = At least one and respondent registered with GP) OR (Whether respondent registered with GP = Yes) OR (Whether respondent registered with GP = Yes)
| | | [((NLSatLF = 1) AND (GPRegB = 1))OR (LFSam = 1) OR (GPRegB = 1)]

| | | GPSENDLF @
| | | May we send your lung function test results to your GP?
| | |   1 Yes
| | |   2 No

| | | END FILTER

| | | IF Whether results may be sent to GP = No [GPSendLF = 2]

| | | LFCODE4 @
| | | NURSE: Circle consent code 04 on front of the Consent Booklet.
| | | Press <1> and <Enter> to continue.
| | | Range: 1..1

| | | GPRLFM @
| | | NURSE: Specify reason(s) for refusal to allow LF readings to be sent to GP.
| | | CODE ALL THAT APPLY.
| | |   1 Hardly / Never sees GP
| | |   2 GP knows respondent's LF level
| | |   3 Does not want to bother GP
| | |   4 Other (SPECIFY AT NEXT QUESTION)
| | | [Code maximum 4 out of 4 possible responses]

| | | IF Why results may not be sent to GP = Other [GPRLFM = 4]

| | | OTHREFM @
| | | NURSE: Give full details of reason(s) for refusal.
| | | String 140

| | | END FILTER

| | | ELSE IF Whether results may be sent to GP = Yes [GPSendLF = 1]

| | | NCINS1 @
| | | NURSE: Ask the respondent to read and initial 'Lung Function to GP consent', on page 5 of the consent booklet
| | | Explain the need for written consent and ask the respondent to print name, sign and date the Consent Form in the spaces provided at the bottom of page 5 of the Consent Booklet (if not done already).

```

| | | Nurse: Print your name, sign and date in the spaces provided at the bottom of  
| | | page 5 of the Consent Booklet.  
| | | - Check the name by which the GP knows the respondent.  
| | | - Check GP name, address and phone number are recorded on the front of the  
| | | consent booklet.  
| | | - Circle consent code 13 on the front of the Consent Booklet.  
| | | Press <1> and <Enter> to continue."

| | | *IF (LFWill IN [No, YesUn]) OR (LFSam = NotReg) OR (LungEx = Yes) OR  
(GPSSendLF = No) THEN*

| | | **CODE04**

| | | NURSE: Circle code 06 on the front of the Consent Booklet.  
| | | Press <1> and <Enter> to continue.

| | | END FILTER

| | END FILTER

END FILTER

## BALANCING MODULE

### **BALINT @**

NURSE: Now follows the Balancing module.

Press <1> and <Enter> to continue.

Range: 1..1

### **MMBCINT @**

NURSE: Explain the purpose of the tests:

'I would now like to carry on with some more physical performance measurements, this will involve asking you to move your body in different ways.'

I will first describe and show each movement to you, then I'd like you to try to do it.

If you cannot do a particular movement, or if you feel it would be unsafe to try to do it, please tell me and we'll move on to the next one.

Let me emphasize that I do not want you to try to do any exercise that you feel might be unsafe.

Do you have any questions before we begin?'

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

### **MMBCSC**

NURSE: Check respondent's status and availability.

ASK: 'Do you have any problems from recent surgery, injury or other health conditions that might prevent you from standing up from a chair or balancing?'

1 Yes

2 No

*IF Whether respondent has any problems / health conditions = Yes [MmBCSc = 1]*

### **MMBCCH @**

| NURSE: After you describe each test, discuss with respondent whether [^he / she] should attempt the test given [^his / her] physical problems.

| Do not assume a respondent is too physically limited to attempt a test without discussing it with [^him / her].

| However, remember that the respondent's health is paramount.

| Press <1> and <Enter> to continue.

| Range: 1..1

| END FILTER

### **MMSSINT @**

NURSE: First explain and then demonstrate the side-by-side stand to the respondent.  
'Now I will show you the first movement.'

I want you to try to stand with your feet together, side-by-side, for about 10 seconds.

You may use your arms, bend your knees, or move your body to maintain your balance, but try not to move your feet.

Try to hold this position until I tell you to stop.

You may support yourself on a chair, table or wall while getting into position.'

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

**MMSSSC**

Do you feel that would be safe?

- 1 Yes
- 2 No

*IF Whether respondent feels it is safe to attempt side-by-side stand = Yes  
[MmSSSc = 1]*

**MMSSSTT @**

When I want you to start, I will say: 'Ready, begin'.

NURSE: Ask the respondent to stand up. Stand to the side of the respondent.

SAY: 'Ready, begin!'

Press the start button to start the stopwatch as soon as the respondent gets into the position and removes their hand from the support.

If necessary, provide gentle support to the respondent's arm to help [^him / her] into the side-by-side stand.

SAY: 'Ready, begin!' and then let go of [^his / her] arm.

Stop the stopwatch and say 'Stop' after 10 seconds or when the participant steps out of position or grabs your arm.

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

**MMSSRE**

NURSE: Record the outcome of the side-by-side stand.

- 1 Held for 10 seconds
- 2 Held for less than 10 seconds
- 3 Not attempted

*IF Outcome of side-by-side stand = held for less than 10 seconds [MmSSRe = 2]*

**MMSTI**

NURSE: Record the time in seconds to two decimal places.

(enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).

Use the full stop as the decimal point, e.g. 6.55.

END FILTER

END FILTER

*IF (Whether respondent feels it is safe to attempt side-by-side stand = No) OR  
(Outcome of side-by-side stand = not attempted) [(MmSSSc = 2) OR (MmSSRe = 3)]*

**MMSSNA**

NURSE: Record reason side-by-side stand was not attempted.

- 1 Tried but unable
- 2 Participant could not hold position unassisted
- 3 Not attempted, you felt unsafe
- 4 Not attempted, participant felt unsafe
- 5 Participant unable to understand instructions

- | 6 Participant refused
- | 7 Other reason |

END FILTER

*IF Outcome of side-by-side stand = held for 10 seconds [MmSSRe = 1]*

**MMSTINT @**

NURSE: First explain and then demonstrate the semi-tandem stand to the respondent:  
'Now I will show you the next movement.'

I want you to try to stand with the side of the heel of one foot touching the big toe of the other foot for about 10 seconds.

You may put either foot in front, whichever is more comfortable for you.

You may use your arms, bend your knees, or move your body to maintain your balance, but try not to move your feet.

Try to hold this position until I tell you to stop.

You may support yourself on a chair, table or wall while getting into position.'

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

**MMSTSC**

Do you feel that would be safe?

- | 1 Yes
- | 2 No

*IF Whether respondent feels it is safe to attempt semi-tandem stand = Yes [MmSTSc = 1]*

**MMSTTSTT @**

When I want you to start, I will say: 'Ready, begin'.

NURSE: Ask the respondent to stand up. Stand to the side of the respondent.

SAY: 'Ready, begin!'

Press the start button to start the stopwatch as soon as the respondent gets into the position and removes their hand from the support.

If necessary, provide gentle support to the respondent's arm to help [^him / her] into the semi-tandem position.

SAY: 'Ready, begin!' and then let go of [^his / her] arm.

Stop the stopwatch and say 'Stop' after 10 seconds or when the participant steps out of position or grabs your arm.

NURSE: Press <1> and <Enter> to continue.

Range: 1..1

**MMSTRE**

NURSE: Record the outcome of the semi-tandem stand.

- | 1 Held for 10 seconds
- | 2 Held for less than 10 seconds
- | 3 Not attempted

*IF Outcome of semi-tandem stand = held for less than 10 seconds [MmSTRRe = 2]*

**MMSTTI**  
 NURSE: Record the time in seconds to two decimal places.  
 (enter the large numbers on the stopwatch display before the decimal point  
 and the small numbers after it).  
 Use the full stop as the decimal point, e.g. 6.55.

END FILTER

END FILTER

*IF (Whether respondent feels it is safe to attempt semi-tandem stand = No) OR  
 (Outcome of semi-tandem stand = not attempted) [(MmSTSc = 2) OR (MmSTRRe = 3)]*

**MMSTNA**  
 NURSE: Code the reason why semi-tandem stand was not attempted.  
 1 Tried but unable  
 2 Participant could not hold position unassisted  
 3 Not attempted, you felt unsafe  
 4 Not attempted, participant felt unsafe  
 5 Participant unable to understand instructions  
 6 Participant refused  
 7 Other reason

END FILTER

*IF Outcome of semi-tandem stand = held for 10 seconds [MmSTRRe = 1]*

**MMFTINT @**  
 NURSE: First explain and then demonstrate the full tandem stand to the respondent:  
 'Now I will show you the next movement.  
 I want you to try to stand with the heel of one foot in front of and touching the toes of  
 the other foot for about [^30 / 10] seconds.  
 You may put either foot in front, whichever is more comfortable for you.  
 You may use your arms, bend your knees, or move your body to maintain your  
 balance, but try not to move your feet.  
 Try to hold this position until I tell you to stop.  
 You may support yourself on a chair, table or wall while getting into position.'  
 NURSE: Press <1> and <Enter> to continue.  
 Range: 1..1

**MMFTSC**  
 Do you feel that would be safe?  
 1 Yes  
 2 No

*IF Whether respondent feels it is safe to attempt full tandem stand = Yes  
 [MmFTSc = 1]*

**MMFTSTT @**  
 When I want you to start, I will say: 'Ready, begin'.  
 NURSE: Ask the respondent to stand up. Stand to the side of the respondent.

SAY: 'Ready, begin!'  
Press the start button to start the stopwatch as soon as the respondent gets into the position and removes their hand from the support.  
If necessary, provide gentle support to the respondent's arm to help [^him / her] into the full tandem position.  
SAY: 'Ready, begin!' and then let go of [^his / her] arm.  
Stop the stopwatch and say 'Stop' after [^30 / 10] seconds or when the participant steps out of position or grabs your arm.  
NURSE: Press <1> and <Enter> to continue.  
Range: 1..1

#### **MMFTRE**

NURSE: Record the outcome of the full tandem stand.

- 1 Held for [^30 / 10] seconds
- 2 Held for less than [^30 / 10] seconds
- 3 Not attempted

**[Variable MMFTRE2 indicates whether the respondent held the full tandem stand for 10 or 30 seconds (which depended on their age)]**

*IF Outcome of full tandem stand = held for less than 30 / 10 seconds  
[MmFTRe = 2]*

#### **MMFTTI**

NURSE: Record the time in seconds to two decimal places.  
(enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).  
Use the full stop as the decimal point, e.g. 6.55.

#### **[CHECK N82]**

END FILTER  
END FILTER

*IF (Whether respondent feels it is safe to attempt full tandem stand = No) OR  
(Outcome of full tandem stand = not attempted) [(MmFTSc = 2) OR (MmFTRe = 3)]*

#### **MMFTNA**

NURSE: Record reason full tandem stand was not attempted.

- 1 Tried but unable
- 2 Participant could not hold position unassisted
- 3 Not attempted, you felt unsafe
- 4 Not attempted, participant felt unsafe
- 5 Participant unable to understand instructions
- 6 Participant refused
- 7 Other reason

END FILTER  
END FILTER  
END FILTER

## LEG RAISE MODULE

*IF (Age of respondent (computed) <= 69) AND (Outcome of side-by-side stand = Held for 10 seconds) [(HHAge <= 69) AND (MmSSRe = 1)]*

### **LEGINT @**

NURSE: Now follows the Leg Raise module.

Press <1> and <Enter> to continue.

Range: 1..1

### **MMLQINT @**

NURSE: First explain and then demonstrate the leg raise to the respondent:

'Now I will show you the next movement.

I want you to try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches.

Stand for as long as you can - I will stop you at 30 seconds.

You may use your arms, bend your knees, or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop.

You may support yourself on a chair, table or wall while getting into position.'

NURSE: Make sure there is a firm support nearby and allow the respondent to practice.

Press <1> and <Enter> to continue.

Range: 1..1

### **MMLOSC**

Do you feel that would be safe?

1 Yes

2 No

*IF Whether respondent feels it is safe to attempt leg raise (eyes open) = Yes  
[MmLOSc = 1]*

### **MMLOSTT @**

When I want you to start, I will say: 'Ready, begin'.

NURSE: Ask the respondent to stand up near to a firm support, eg wall or chair.

Stand to the side of the respondent. SAY: 'Ready, begin!'

Press the start button to start the stopwatch as soon as the respondent raises one foot off the ground and removes their hand from the support.

If necessary, provide gentle support to the respondent's arm to help [^him / her] into position.

SAY: 'Ready, begin!' and then let go of [^his / her] arm.

Stop the stopwatch and say 'Stop!' either

A) when the raised leg touches the floor as the respondent loses [^his / her] balance or

B) after 30 seconds, whichever happens first.

Press <1> and <Enter> to continue.

Range: 1..1

### **MMLORE**

NURSE: Record the outcome of the leg raise.

- 1 Held for 30 seconds
- 2 Held for less than 30 seconds
- 3 Not attempted

*IF Outcome of leg raise (eyes open) = held for less than 30 seconds  
[MmLORe = 2]*

**MMLOTI**

NURSE: Record the time in seconds to two decimal places.  
(enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).  
Use the full stop as the decimal point, e.g. 6.55.

END FILTER

END FILTER

*IF (Whether respondent feels it is safe to attempt leg raise (eyes open) = No) OR  
(Outcome of leg raise (eyes open) = not attempted)  
[(MmLOSc = 2) OR (MmLORe = 3)]*

**MMLONA**

NURSE: Record reason leg raise was not attempted.

- 1 Tried but unable
- 2 Participant could not hold position unassisted
- 3 Not attempted, you felt unsafe
- 4 Not attempted, participant felt unsafe
- 5 Participant unable to understand instructions
- 6 Participant refused
- 7 Other reason

END FILTER

*IF Outcome of leg raise (eyes open) = held for 30 seconds [MmLORe = 1]*

**MMLSINT @**

NURSE: First explain and then demonstrate the leg raise with eyes closed to the respondent:  
'Now I would like you to repeat the procedure one more time, this time with your eyes closed.

I want you to close your eyes and try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches.

Stand for as long as you can - I will stop you at 30 seconds.

You may use your arms, bend your knees, or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop.

You may support yourself on a chair, table or wall while getting into position.'

NURSE: Make sure there is a firm support nearby and allow the respondent to practice.

Press <1> and <Enter> to continue.

Range: 1..1

**MMLSSC**

Do you feel that would be safe?

- 1 Yes
- 2 No

*IF Whether respondent feels it is safe to attempt leg raise (eyes shut)= Yes  
[MmLSSc = 1]*

**MMLSSTT @**

When I want you to start, I will say: 'Ready, begin'.

NURSE: Ask the respondent to stand up near to a firm support, eg wall or chair.

Stand to the side of the respondent. SAY: 'Ready, begin!'

Press the start button to start the stopwatch as soon as the respondent raises one foot off the ground and removes their hand from the support.

If necessary, provide gentle support to the respondent's arm to help [^him / her] into position.

SAY: 'Ready, begin!' and then let go of [^his / her] arm.

Stop the stopwatch and say 'Stop!' either

A) when the raised leg touches the floor as the respondent loses [^his / her] balance or

B) after 30 seconds, whichever happens first.

Press <1> and <Enter> to continue.

Range: 1..1

**MMLSRE**

NURSE: Record the outcome of the leg raise with eyes shut.

- 1 Held for 30 seconds
- 2 Held for less than 30 seconds
- 3 Not attempted

*IF Outcome of leg raise (eyes shut) = held for less than 30 seconds  
[MmLSRe = 2]*

**MMLSTI**

NURSE: Record the time in seconds to two decimal places.

(enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).

Use the full stop as the decimal point, e.g. 6.55.

END FILTER

END FILTER

*IF (Whether respondent feels it is safe to attempt leg raise (eyes shut) = No) OR  
(Outcome of leg raise (eyes shut) = not attempted)  
[(MmLSSc = 2) OR (MmLSRe = 3)]*

**MMLSNA**

NURSE: Record reason leg raise with eyes shut was not attempted.

- 1 Tried but unable
- 2 Participant could not hold position unassisted

```
| | | 3 Not attempted, you felt unsafe  
| | | 4 Not attempted, participant felt unsafe  
| | | 5 Participant unable to understand instructions  
| | | 6 Participant refused  
| | | 7 Other reason  
| |  
| | END FILTER  
| |  
| | END FILTER  
|  
END FILTER
```

## CHAIR RISE MODULE

### **CHRINT @**

NURSE: Now follows the Chair Rise module.

Press <1> and <Enter> to continue.

Range: 1..1

### **MMCRAV**

NURSE: Check the availability of a suitable chair.

- 1 Suitable chair available
- 2 No suitable chair available

*IF Whether suitable chair for chair rise available = available [MmCRAv = 1]*

### **MMCRINT @**

The next test measures the strength in your legs.

NURSE: First explain and then demonstrate the procedure:

'I want you to try to stand up from a firm straight-backed chair, like a dining chair.  
First, fold your arms across your chest and sit so that your feet are on the floor; then stand up keeping your arms folded across your chest.'

Press <1> and <Enter> to continue.

Range: 1..1

### **MMCRSC**

Do you feel it would be safe to do this?

NURSE: If the participant cannot rise without using arms,

SAY: 'Okay, try to stand up using your arms.'

- 1 Yes
- 2 No

*IF Whether respondent feels safe to attempt single chair rise = Yes [MmCRSc = 1]*

### **MMCRRE**

NURSE: Record the outcome of single chair rise measure.

- 1 Participant stood without using arms
- 2 Participant used arms to stand
- 3 Test not completed

*IF Outcome of single chair rise measure = Not completed [MmCRRe = 3]*

### **MMCRNA**

NURSE: Record the reason why the test was not completed.

- 1 Tried but unable
- 2 Participant could not hold position unassisted
- 3 Not attempted, you felt unsafe
- 4 Not attempted, participant felt unsafe
- 5 Participant unable to understand instructions
- 6 Participant refused
- 7 Other reason

[Refusal is not allowed]

END FILTER

END FILTER

*IF Outcome of single chair rise measure = Stood without using arms  
[MmCRRRe = 1]*

**MMRRINT @**

NURSE: Use the same chair and the same place as in the single chair rise.

Explain the test to the respondent:

'Now I would like you to repeat the procedure but this time I want you to stand up straight as quickly as you can [^ten / five] times, without stopping in between and without using your arms to push off.

After standing up each time, sit down and then stand up again.

Keep your arms folded across your chest. I'll be timing you with a stopwatch.'

NURSE: Demonstrate.

Press <1> and <Enter> to continue.

Range: 1..1

**MMRRSC**

Do you feel it would be safe to do that?

- 1 Yes
- 2 No

*IF Whether respondent feels safe to attempt multiple chair rise = Yes  
[MmRRSc = 1]*

**MMRRSTT @**

NURSE: Ask the respondent to resume the sitting position [^he / she] was in just before standing up, with feet resting on the floor and arms folded across the chest.

When the participant is properly seated, say 'Ready? Begin!'.

Start the stopwatch as soon as you say 'Ready? Begin!'.

Count out loud as [^he / she] rises each time, up to [^ten / five] times.

A rise is complete when the respondent is fully standing with their back straight.

When the respondent completes the fifth rise, press the split timer on the stopwatch.

Continue counting out loud.

When the respondent has straightened up completely for the [^tenth / fifth] time, stop the stopwatch.

Press <1> and <Enter> to continue.

Range: 1..1

**MMRRRE**

NURSE: Record the total number of rises completed.

Range: 0..10

END FILTER

*IF Outcome of multiple chair rises (number of rises completed) = [5 - 10]  
[MMRRRe = [5 - 10]]*

**MMRRFTI**

NURSE: Record the time in seconds to two decimal places to complete five chair rises (enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).

Use the full stop as the decimal point, e.g. 26.55.

**[CHECKS N83 - N84]**

*IF (Age of respondent (computed) <= 69) AND (Outcome of multiple chair rises (number of rises completed) = 10) [(HHAge <= 69) AND (MMRRRe = 10)]*

**MMRRTTI**

NURSE: Record the time in seconds to two decimal places to complete ten chair rises (enter the large numbers on the stopwatch display before the decimal point and the small numbers after it).

Use the full stop as the decimal point, e.g. 26.55.

**[CHECKS N85 - N87]**

END FILTER

END FILTER

*IF (Whether respondent feels safe to attempt multiple chair rise = No) OR  
(Outcome of multiple chair rises (number of rises completed) < 5) OR ((Age of respondent (computed) <= 69) AND (Outcome of multiple chair rises (number of rises completed) < 10))  
[(MmRRSc = 2) OR (MMRRRe < 5) OR ((HHAge <= 69) AND (MMRRRe < 10))]*

**MMRRNA**

NURSE: Record reason why participant did not attempt or failed to complete all chair rises.

- 1 Tried but unable
  - 2 Participant could not hold position unassisted
  - 3 Not attempted, you felt unsafe
  - 4 Not attempted, participant felt unsafe
  - 5 Participant unable to understand instructions
  - 6 Participant refused
  - 7 Other reason
- [Refusal is not allowed]

END FILTER

END FILTER

END FILTER

## **HAIR SAMPLING**

### **HAIRINTR@**

NURSE: Now follows the Hair sampling module.

Press <1> and <Enter> to continue.

### **HAIREXCL**

NURSE: Do not read out - Participants are excluded from the hair sample in the following circumstances:

- Pregnancy (in 'younger partner' participants)
- Breastfeeding (in 'younger partner' participants)
- Current scalp condition rendering the hair sample soiled or at risk of transmission of an unknown / known blood borne virus (e.g. active bleeding or infection)
- Respondent is unable to sit with head remaining still (e.g. continual tremor / head shaking)
- Has less than 2cms of hair length in the posterior vertex scalp area (not including any hair extensions)

Is the respondent excluded from providing a hair sample for any of the above reasons?"

- 1 Yes  
2 No

*IF HAIREXCL = Yes*

/

### **HAIREXC2**

| NURSE: Please code the reason for respondent being excluded from hair sample collection.

- | 1 Pregnant  
| 2 Breast feeding  
| 3 Current scalp condition rendering hair sample soiled or at risk of transmission of blood borne virus  
| 4 Participant unable to sit with head remaining still  
| 5 Participant has less than 2cms of hair in the posterior vertex scalp area (not including any hair extensions)  
| 6 Other reason (please specify)

| | *IF HAIREXCL Y = Other*

### **HAIREXO@**

| | NURSE: Enter full details of other reason(s) for not attempting hair sample.

| | STRING 140

### **HAIRINTRO@**

| | READ OUT: We are interested in measuring a hormone called cortisol. Cortisol levels will tell us about any stress you might experience. This is of particular interest because stress may be related to heart disease.

| | The amount of cortisol released over time can be measured in hair.

| | *END FILTER*

| | **HAIRPROC**

| NURSE: Explain to the respondent what is involved in the hair sample collection  
 | procedure (this is outlined in the project instructions / hair sample collection procedure  
 | sheet). We would like to take a small sample of your hair to test it for cortisol. Would  
 | you be willing to do this?  
 | 1 Yes  
 | 2 No  
 |  
 | | IF HAIRPROC = No  
 | |  
 | | | **HAIRWHY<sup>5</sup>@**  
 | | | NURSE: Give reasons for refusal.  
 | | | STRING 140  
 | |  
 | | | **HAIRNO @**  
 | | | NURSE: Circle consent code 16 on front of the Consent Booklet.  
 | | | Press <1> and <Enter> to continue.  
 | |  
 | | | END FILTER  
 | |  
 | | | ELSEIF HAIRPROC = Yes  
 | |  
 | | | **HAIRCONS@**  
 | | | NURSE: Ask the respondent to read and initial 'Hair Sample Consent', on page 5 of  
 | | | the Consent Booklet. Explain the need for written consent and ask the respondent to  
 | | | print name, sign and date the Consent Form in the spaces provided at the bottom of  
 | | | page 5 of the Consent Booklet (if not done already).  
 | | | Nurse: Print your name, sign and date in the spaces provided at the bottom of page 5  
 | | | of the Consent Booklet.  
 | | | Circle consent code 15on front of the Consent Booklet.  
 | | | Press <1> and <Enter> to continue.  
 | |  
 | | | **HAIRCUT@**  
 | | | NURSE: Take the hair sample. Once the hair sample has been cut, tighten the wire to  
 | | | ensure the hair strands do not become free.  
 | | | Place the hair sample into the sample envelope with the scalp (cut end) uppermost.  
 | | | Bend the end of the wire tie over the envelope closure to provide a fixing point for the  
 | | | sample and seal the envelope over the tie.  
 | | | Press <1> and <Enter> to continue.  
 | |  
 | | | **HAIRPACK**  
 | | | NURSE: Place a pre-prepared respondent sample label on the sample envelope, on  
 | | | the same side as the envelope closure. Complete the CAPI and dispatch note as per  
 | | | project instructions. Place the labelled hair sample envelope into the hard backed A5  
 | | | dispatch envelope with the dispatch note and post.  
 | | | Was a hair sample obtained?  
 | | | 1 Yes  
 | | | 2 No  
 | |  
 | | | **CODE16a@**

---

<sup>5</sup> Answers here coded into variables HairWhy1-HairWhyZ

| | NURSE: Cross out consent code 15 if already circled on the front of the Consent Booklet. Replace with consent code16 on the front of the Consent Booklet.  
| | Press <1> and <Enter> to continue.

| | *IF HAIRPACK = Yes*

| |   **HAIRCOL**  
| |   NURSE: What colour is the hair sample?  
| |   1 Brown  
| |   2 Blonde  
| |   3 Red/auburn/ginger  
| |   4 White  
| |   5 Grey  
| |   6 Black  
| |   7 Other colour (please specify)

| |   **HAIRCLO@**  
| |   NURSE: Please give other hair colour.  
| |   STRING 40

| |   *END FILTER*

| | **HAIRDYE**  
| | NURSE: Is your hair dyed?  
| | 1 Yes  
| | 2 No

| | *IF HAIRDYE = Yes*

| |   **HAIRDYEL**  
| |   NURSE: When did you last have it dyed?  
| |   1 Yesterday  
| |   2 A few days ago  
| |   3 1-2 weeks ago  
| |   4 3-4 weeks ago  
| |   5 Over a month ago

| |   **HAIRDYET**  
| |   NURSE: What type of dye did you use?  
| |   1 Permanent  
| |   2 Semi-permanent  
| |   3 Don't Know (SPONTANEOUS ONLY)

| |   *END FILTER*

| | **HAIRTREA**  
| | Has your hair been chemically treated (eg. Perm, chemical straightening)?  
| | 1 Yes  
| | 2 No

| | *| IF HAIRTREAT = Yes*

```
| | HAIRTREA2
| | When did you last have it done?
| | 1 Yesterday
| | 2 A few days ago,
| | 3 1-2 weeks ago
| | 4 3-4 weeks ago
| | 5 Over a month ago
| |
| | END FILTER
| |
| | HAIRWET@
| | Apart from when it rains, on average how many times per week do you get your hair
| | wet, e.g. from swimming or washing?
| | STRING 50
| |
| | ELSE
| |
| | HAIRNOSA@
| | NURSE: Why was no hair sample obtained?
| | 1 Respondent changed mind after consent gained
| | 2 Respondent too uncomfortable during procedure
| | 3 Could not get long enough sample
| | 4 Other reason (please specify)
| |
| | | IF HAIRNOSA = Yes
| | | HAIRNOY@
| | | NURSE: Enter full details of other reason(s) for not obtaining hair sample.
| | | STRING 140
```

## **FINAL QUESTIONS MODULE**

### **ALLCHECK @**

Check before leaving the respondent:

- # That all respondents have the relevant copies from the Consent Booklet.
- # That you have re-checked the puncture site after taking blood for that individual (if applicable)..
- # That full GP details are entered on front of the Consent Booklet, along with the name by which GP knows respondent.
- # That all details are completed on front of the Consent Booklet.
- # That there are eight appropriate consent codes ringed on front of the Consent Booklet.
- # That all necessary initials and signatures have been collected.

Press <1> and <Enter> to continue.

Range: 1..1

### **ENDREACH @**

NURSE: End of questionnaire reached.

Press <1> and <Enter> to continue.

Range: 1..1

### **NUROUTC**

NURSE: Why were you not able to complete the nurse schedule for person ^PerNum ^RName?"

- 79 Partner but nurse schedule completed
  - 80 Refused nurse visit in main interview - and still refuses nurse visit",
  - 81 Nurse schedule completed
  - 82 No contact made
  - 83 Refusal by person
  - 84 Proxy refusal
  - 85 Broken appointment
  - 86 Ill (at home)
  - 87 Ill (in hospital)
  - 88 Away (other reason)
  - 89 Other reason for schedule not being completed
- [Don't Know and Refusal are not allowed]

*IF whether respondent completed and sent back self-completion questionnaire=Not complete yet [INtSC2=3]*

|  
| **INTSC5 @**

- | NURSE: Has the respondent completed the self-completion questionnaire(s)?
- | 1 Completed, to be posted back by nurse
  - | 2 To be posted back by respondent
  - | 3 Respondent refused
- | [Don't Know and Refusal are not allowed]

|  
| END FILTER

### **SURDOC @**

NURSE: Has the respondent given you any survey (other) documents left with them by

the interviewer?

- 1 Yes
- 2 No

*IF whether respondent gave nurse interviewer document=yes [SurDoc = 1]*

**WHHDOC @**

NURSE: Code which document(s) you have been given.  
CODE ALL THAT APPLY.

- 1 Orange self completion booklet
- 2 Purple or green self completion booklet
- 3 Yellow consent form
- 4 Pink NHS register linkage consent form

*IF Interviewer documents given to nurse = Blue self completion booklet [Whhdoc=1]*

**SCDOC @**

Please put theself completion booklet in pre-paid envelope and post back to the office.  
Press <1> and <Enter> to continue.  
1..1

END FILTER

*| IF Interviewer documents given to nurse = Yellow consent form OR Pink NHS register linkage consent form [Whhdoc=2 or 3]]*

**FULLDOC @**

NURSE: If the respondent is giving you a completed consent form - check that serial number, check letter and person number have been filled in on the relevant form(s) (yellow and/or pink).  
Tear off top copy and return to office in prepaid envelope.  
Leave bottom copy with respondent for their records.  
Press <1> and <Enter> to continue."  
1..1

END FILTER

*| IF Interviewer documents given to nurse = Thank you letter with cheque [Whhdoc=4]*

**THKDOC @**

NURSE: : Leave thank you letter with cheque the with respondent. It is a token of our appreciation.  
If respondent cannot cash cheque or wishes to convert it to vouchers,  
encourage them to phone the office.  
Press <1> and <Enter> to continue."  
1..1

END FILTER

END FILTER

**THANK @**

NURSE: Thank the respondent for [^his / her] co-operation.

Then press <1> and <Enter> to finish.

Range: 1..1

## APPENDIX - PROGRAM CHECKS

There are two types of checks: soft checks and hard checks.

A *soft* check is a warning that appears when the value entered is extreme or unlikely. It can be suppressed by the interviewer without changing the value entered.

A *hard* check is a warning that appears when the value entered is impossible. A hard check cannot be suppressed by the interviewer without changing the value entered.

### DEMOGRAPHICS MODULE CHECKS

*IF Whether today's date is shown correctly = Yes [DateOK = 1]*

| **CHECK N1 (Soft)**

| CHECK: date of interview <> automatically recorded date of interview  
[NurDate <> MachDate]

| | Are you sure? You previously entered the date of interview as [^MachDate:  
automatically recorded date of interview].

| | If [^MachDate: automatically recorded date of interview] is the correct date of  
interview, please change to this.

| | Else, press <S> to continue.

| | END CHECK

| END FILTER

*IF Checking respondent's date of birth - year <> EMPTY [NDoBY <> EMPTY]*

| **CHECK N2 (Soft)**

| CHECK: date of birth (derived) = EMPTY [NDoB = EMPTY]

| | Please enter the day, month and year of a valid date.

| | If any of these are really unknown, suppress this warning.

| | END CHECK

| END FILTER

*IF Checking respondent's date of birth - year = RESPONSE [NDoBY = RESPONSE]*

| **CHECK N3 (Hard)**

| CHECK: date of birth (derived) > date of interview [NDoB > NurDate]

| | NURSE: This date of birth is after the date you have entered for today's date.

| | Please change one or the other.

| | END CHECK

```

| IF Date of birth = RESPONSE [DOB = RESPONSE]
| |
| | CHECK N4 (Soft)
| | CHECK: date of birth (derived) <> date of birth (recorded) [NDoB <> DOB]
| |
| | NURSE: The interviewer recorded [^DoB: date of birth (recorded)] as the date
| | of birth, please query.
| | Then either amend the date of birth which you entered, or suppress this
| | warning and explain in a note <Ctrl M>.
| |
| | END CHECK
| |
| | END FILTER
| |
| | CHECK N5 (Soft)
| | CHECK: age of respondent (confirmed) > 99 [ConfAge > 99]
| |
| | This gives an age of [^ConfAge: age of respondent (confirmed)] years old, please
| | check.
| |
| | END CHECK
| |
| | END FILTER

```

*IF (Age of respondent (confirmed) = RESPONSE) AND (Age of respondent >= 1)*  
*[(DispAge = RESPONSE) AND (RAge >= 1)]*

```

| CHECK N6a (Soft)
| CHECK: age of respondent (from household grid) <> age of respondent
| (confirmed) [(RAge <> ConfAge)
| |
| | NURSE: You recorded the age as [^Rage: age of respondent (from household
| | grid)] in the Household Grid, please query.
| | Then either amend the date of birth which you entered, or suppress this warning
| | and explain in a note <Ctrl M>.
| |
| | END CHECK
| |
| | END FILTER

```

**CHECK N6b (Hard)**  
CHECK: Whether age of respondent (confirmed) is right <> Yes [DispAge <> 1]

```

| |
| | NURSE: Press <Enter> and sort out the correct date of birth.
| |
| | END CHECK

```

## **PRESCRIBED MEDICATIONS AND DRUG CODING MODULE CHECKS**

**CHECK N7a (Hard)**

CHECK: Whether drug code length is 6 digits]  
|  
| NURSE: The drug code is a six digit number. Please enter it using only the digits 0-9  
|  
END CHECK

**CHECK N7b (Hard)**

CHECK: Whether drug code is valid based on the look up table of codes from the codeframe]  
|

| NURSE: Please check, this drug code doesn't seem to be valid.  
|  
END CHECK

**CHECK N7c (Soft)**

CHECK: Whether drug code = 020102 OR 021001 OR 021002]  
|

| NURSE: Are you sure? This code is used for acute hospital treatment of heart attack.  
Please check your coding.  
|  
END CHECK

## BLOOD PRESSURE MODULE CHECKS

*IF Whether respondent has done anything that will affect their BP measurement = None  
[CONSUBX = 5]*

| **CHECK N8 (Hard)**  
| CHECK: (whether respondent has done anything that will affect their BP  
| measurement = none of these) AND (whether respondent has done anything that  
| will affect their BP measurement = at least one other answer)  
| [ConSubX.CARDINAL <> 1]  
| | ConSubX: '(None of these)' is an exclusive category.  
| |  
| END CHECK  
|

END FILTER

**CHECK N9 (Soft)**

CHECK: (*Done anything that will affect BP in last 30 minutes = eaten, smoked, drunk alcohol, or done exercise*) [(ConSubX=1,2,3 or 4)]

| NURSE: This could affect their blood pressure measurements. If possible see other  
| members of the household first in order to give time for the effects to wear off. If you  
| ARE able to do this please change answer here to 5 (None of these).  
|  
END CHECK

*IF (ambient air temperature (centigrades) = RESPONSE) [AirTemp = RESPONSE]*

**CHECK N10 (Soft)**

CHECK: Air temperature: decimal point = 0 [FRAC(AirTemp) = 0]

Please record air temperature with one decimal digit, using the full stop as decimal point. If the decimal is zero, suppress this warning and continue.

END CHECK

**CHECK N11 (Soft)**

CHECK: (air temperature > 25) OR (air temperature < 15)  
[(AirTemp > 25) OR (AirTemp < 15)]

Please check, is very unusual for the room temperature to be more than 25 centigrades or less than 15 centigrades. If this temperature is correct, please try to alter it before taking blood pressure readings.

END CHECK

END FILTER

**CHECK N12 (Hard)**

CHECK: (BP: systolic reading <> [51 - 299, 844, 996, 999]) AND (BP: systolic reading = RESPONSE)  
[(Sys <> [51 - 299, 844, 996, 999]) AND (Sys = RESPONSE)]

Systolic reading should be between 51 and 299 or 844 or 999.

END CHECK

**CHECK N13 (Hard)**

CHECK: (BP: diastolic reading <= 31) AND (BP: diastolic reading = RESPONSE)  
[(Dias <= 31) AND (Dias = RESPONSE)]

Diastolic should be more than 31.

END CHECK

**CHECK N14 (Hard)**

CHECK: (BP: diastolic reading > 199) AND (BP: diastolic reading <> [844, 999])  
[(Dias > 199) AND (Dias <> 844, 999)]

Diastolic should be less than 200 or 844 or 999.

END CHECK

**CHECK N15 (Hard)**

CHECK: (BP: pulse reading < 30) AND (BP: pulse reading = RESPONSE)  
[(Pulse < 30) AND (Pulse = RESPONSE)]

| Pulse should be more than 29.  
|  
END CHECK

**CHECK N16 (Hard)**

CHECK: (BP: pulse reading <> [30 .. 160, 844, 999]) AND (BP: pulse reading = RESPONSE)  
[(Pulse <> [30 - 160, 844, 999]) AND (Pulse = RESPONSE)]

| Pulse should be between 30 and 160 or 844 or 999.  
|  
END CHECK

**CHECK N17 (Soft)**

CHECK: (BP: pulse reading <= 48) AND (BP: pulse reading = RESPONSE)  
[(Pulse <= 48) AND (Pulse = RESPONSE)]

| This Pulse reading is rather low. Please double check.  
|  
END CHECK

**CHECK N18 (Soft)**

CHECK: (BP: pulse reading <> [1 .. 110, 844, 999]) AND (BP: pulse reading = RESPONSE)  
[(Pulse <> [1 - 110, 844, 999]) AND (Pulse = RESPONSE)]

| This Pulse reading is rather high. Please double check.  
|  
END CHECK

**CHECK N19 (Soft)**

CHECK: (BP: systolic reading < 90) AND (BP: systolic reading = RESPONSE)  
[(Sys < 90) AND (Sys = RESPONSE)]

| This Systolic reading is rather low. Please double check.  
|  
END CHECK

**CHECK N20 (Soft)**

CHECK: (BP: systolic reading > 250) AND (BP: systolic reading <> [844, 996, 999])  
[(Sys > 250) AND (Sys <> [844, 996, 999])]

| This Systolic reading is rather high. Please double check.  
|  
END CHECK

**CHECK N21 (Soft)**

CHECK: (BP: diastolic reading < 60) AND (BP: diastolic reading = RESPONSE)  
[(Dias < 60) AND (Dias = RESPONSE)]

| This Diastolic reading is rather low. Please double check.

|  
| END CHECK

**CHECK N22 (Soft)**

CHECK: (BP: diastolic reading > 130) AND (BP: diastolic reading <> [844, 999])  
[(Dias > 130) AND (Dias <> [844, 999])]

| This Diastolic reading is rather high. Please double check.

|  
| END CHECK

|  
*IF (BP: systolic reading = [1 - 843, 845 - 995]) AND (BP: pulse reading = [1 - 843, 845 - 998]) AND (BP: diastolic reading = [1 - 843, 845 - 998])  
[(Sys = [1 - 843, 845 - 995]) AND (Pulse = [1 - 843, 845 - 998]) AND  
(Dias = [1 - 843, 845 - 998])]*

|  
*IF (BP: systolic reading = [1 - 843]) AND (BP: diastolic reading = [1 - 843])  
[(Sys = [1 - 843]) AND (Dias = [1 - 843])]*

|  
| **CHECK N23 (Hard)**

CHECK: BP: systolic reading <= BP: diastolic reading [Sys <= Dias]

| Systolic reading must be greater than diastolic reading. Go back and amend.

|  
| END CHECK

|  
| END FILTER

|  
| END FILTER

|  
*IF (Number of BP reading = [2, 3]) AND ((BP: First systolic reading < 844)  
AND (BP: First diastolic reading < 844))  
[((I = [2, 3]) AND (Sys[I] < 844) AND (Dias[I] < 844))]*

|  
*IF ((Previous systolic reading < 844) AND (Previous diastolic reading < 844))  
[((Sys[I-1] < 844) AND (Dias[I-1] < 844))]*

|  
| **CHECK N24 (Soft)**

CHECK: Absolute difference between two systolic readings >= 40  
[ABS (BPRead[I].Sys - BPRead[I-1].Sys) >= 40]

| The difference between the two systolic readings is equal to or more than  
40mmHg. Please check you have entered the readings correctly.

|  
| END CHECK

|  
| **CHECK N25 (Soft)**

CHECK: Difference between two diastolic readings >= 30  
[ABS (BPRead[I].Dias - BPRead[I-1].Dias) >= 30]

| The difference between the two diastolic readings is equal to or more than

```
| | | 30mmHg. Please check you have entered the readings correctly.  
| |  
| | END CHECK  
| |  
| | END FILTER  
| |  
END FILTER
```

*IF Whether any difficulty with taking BP measurements = no problems (DifBPC = 1)*

```
| | CHECK N26 (Hard)  
| | CHECK: (difficulty with taking BP measurements = no difficulty) AND (difficulty with  
| | taking BP measurements = at least one other answer) [DifBPC.CARDINAL <> 1]  
| |  
| | DifBPC: code 1 is exclusive for this question.  
| |  
| | END CHECK  
| |  
END FILTER
```

## GRIP STRENGTH MODULE CHECKS

*IF First measurement with dominant hand = RESPONSE [MMGSD1 = RESPONSE]*

```
| | CHECK N27 (Soft)  
| | CHECK: First measurement with dominant hand > 65 [MMGSD1 > 65]  
| |  
| | NURSE: Are you sure? This reading (^MMGSD1: First measurement with  
| | dominant hand) is very high!  
| |  
| | END CHECK  
| |  
END FILTER
```

*IF Second measurement with dominant hand = RESPONSE  
[MMGSD2 = RESPONSE]*

```
| | CHECK N28 (Soft)  
| | CHECK: Second measurement with dominant hand > 65 [MMGSD2 > 65]  
| |  
| | NURSE: Are you sure? This reading (^MMGSD2: Second measurement with  
| | dominant hand) is very high!  
| |  
| | END CHECK  
| |  
END FILTER
```

*IF Third measurement with dominant hand = RESPONSE [MMGSD3 = RESPONSE]*

```
| CHECK N29 (Soft)
| CHECK: Third measurement with dominant hand > 65 [MMGSD3 > 65]
| |
| | NURSE: Are you sure? This reading (^MMGSD3: Third measurement with
| | dominant hand) is very high!
| |
| END CHECK
|
END FILTER
```

*IF First measurement with non-dominant hand = RESPONSE  
[MMGSN1 = RESPONSE]*

```
| CHECK N30 (Soft)
| CHECK: First measurement with non-dominant hand <= 65 [MMGSN1 <= 65]
| |
| | NURSE: Are you sure? This reading (^MMGSN1: First measurement with
| | non-dominant hand) is very high!
| |
| END CHECK
|
END FILTER
```

*[MMGSN2 = RESPONSE]*

```
| CHECK N31 (Soft)
| CHECK: Second measurement with non-dominant hand <= 65 [MMGSN2 <= 65]
| |
| | NURSE: Are you sure? This reading (^MMGSN2: Second measurement with
| | non-dominant hand) is very high!
| |
| END CHECK
|
END FILTER
```

*IF Third measurement with non-dominant hand = RESPONSE  
[MMGSN3 = RESPONSE]*

```
| CHECK N32 (Soft)
| CHECK: Third measurement with non-dominant hand > 65 [MMGSN3 > 65]
| |
| | NURSE: Are you sure? This reading (^MMGSN3: Third measurement with non-
| | dominant hand) is very high!
| |
| END CHECK
|
END FILTER
```

*IF (Second measurement with dominant hand = RESPONSE) AND (First  
measurement with dominant hand = RESPONSE)*

```
[(MMGSD2 = RESPONSE) AND (MMGSD1 = RESPONSE)]  
|  
| CHECK N33 (Soft)  
| CHECK: ((First measurement with dominant hand - Second measurement with  
| dominant hand) > 20) OR ((Second measurement with dominant hand - First  
| measurement with dominant hand) >20)  
| [((MMGSD1 - MMGSD2) > 20) OR ((MMGSD2 - MMGSD1) > 20)]  
|  
| | NURSE: Please check you have entered the correct value!  
|  
| END CHECK  
|  
END FILTER
```

```
IF (Third measurement with dominant hand = RESPONSE) AND (First measurement  
with dominant hand = RESPONSE)  
[(MMGSD3 = RESPONSE) AND (MMGSD1 = RESPONSE)]  
|  
| CHECK N34 (Soft)  
| CHECK: ((First measurement with dominant hand - Third measurement with  
| dominant hand) > 20) OR ((Third measurement with dominant hand - First  
| measurement with dominant hand) >20)  
| [((MMGSD1 - MMGSD3) > 20) OR ((MMGSD3 - MMGSD1) > 20)]  
|  
| | NURSE: Please check you have entered the correct value!  
|  
| END CHECK  
|  
END FILTER
```

```
IF (Third measurement with dominant hand = RESPONSE) AND (Second  
measurement with dominant hand = RESPONSE)  
[(MMGSD3 = RESPONSE) AND (MMGSD2 = RESPONSE)]  
|  
| CHECK N35 (Soft)  
| CHECK: ((Second measurement with dominant hand - Third measurement with  
| dominant hand) > 20) OR ((Third measurement with dominant hand - Second  
| measurement with dominant hand) > 20)  
| [((MMGSD2 - MMGSD3) > 20) OR ((MMGSD3 - MMGSD2) > 20)]  
|  
| | NURSE: Please check you have entered the correct value!  
|  
| END CHECK  
|  
END FILTER
```

```
IF (Second measurement with non-dominant hand = RESPONSE) AND (First  
measurement with non-dominant hand = RESPONSE)  
[(MMGSN2 = RESPONSE) AND (MMGSN1 = RESPONSE)]  
|  
| CHECK N36 (Soft)
```

```

| CHECK: ((First measurement with non-dominant hand - Second measurement with
| non-dominant hand) > 20) OR ((Second measurement with non-dominant hand -
| First measurement with non-dominant hand) >20)
| [((MMGSN1 - MMGSN2) > 20) OR ((MMGSN2 - MMGSN1) > 20)]
|
| | NURSE: Please check you have entered the correct value!
|
| END CHECK
|
END FILTER

```

*IF (Third measurement with non-dominant hand = RESPONSE) AND (First measurement with non-dominant hand = RESPONSE)  
[(MMGSN3 = RESPONSE) AND (MMGSN1 = RESPONSE)]*

```

| CHECK N37 (Soft)
| CHECK: ((First measurement with non-dominant hand - Third measurement with
| non-dominant hand) > 20) OR ((Third measurement with non-dominant hand - First
| measurement with non-dominant hand) >20)
| [((MMGSN1 - MMGSN3) > 20) OR ((MMGSN3 - MMGSN1) > 20)]
|
| | NURSE: Please check you have entered the correct value!
|
| END CHECK
|
END FILTER

```

*IF (Third measurement with non-dominant hand = RESPONSE) AND (Second measurement with non-dominant hand = RESPONSE)  
[(MMGSN3 = RESPONSE) AND (MMGSN2 = RESPONSE)]*

```

| CHECK N38 (Soft)
| CHECK: ((Second measurement with non-dominant hand - Third measurement
| with non-dominant hand) > 20) OR ((Third measurement with non-dominant hand -
| Second measurement with non-dominant hand) > 20)
| [((MMGSN2 - MMGSN3) > 20) OR ((MMGSN3 - MMGSN2) > 20)]
|
| | NURSE: Please check you have entered the correct value!
|
| END CHECK
|
END FILTER

```

## BLOOD SAMPLE MODULE CHECKS

### **CHECK N39 (Soft)**

CHECK: Blood sample: whether has a clotting disorder = Yes [ClotB = 1]

```

| |
| | NURSE: You have coded that the respondent has a clotting / bleeding disorder or
| | is taking anti-coagulant drugs. This means that no blood is to be taken.

```

```
| Is this correct?  
| If yes suppress this warning and continue. If no, go back and code 2.  
|  
END CHECK
```

#### **CHECK N40 (Hard)**

CHECK: date when last had anything to eat or drink > date at start of Blood module [DateLEat > BIDate]

```
| Please check, you have entered a future date.  
|  
END CHECK
```

#### **CHECK N41 (Soft)**

CHECK: date when last had anything to eat or drink > two days before date at start of Blood module [DateLEat < (BIDate-(0, 0, 2))]

```
| Please check, that is more than 24 hours ago.  
| If respondent has not eaten/drunk anything in the last 24 hours please explain in a  
| note.  
|  
END CHECK
```

#### **CHECK N42 (Soft)**

CHECK: time when last had anything to eat or drink <= time at start of Blood module [TimeLEat <= BITime]

```
| Please check, you seem to have entered a future time.  
| If time is correct please explain in a note why this has occurred.  
|  
END CHECK
```

*IF ((Whether citrate blue tube was filled = No) OR (Whether plain red tube was filled = No) OR (Whether fluoride grey tube was filled = No) OR (Whether (first) EDTA purple tube was filled = No) OR (Whether second EDTA purple tube was filled = No) OR (Whether third EDTA purple tube was filled = No))  
[((SampF1 = 2) OR (SampF2 = 2) OR (SampF3 = 2) OR (SampF4 = 2) OR (SampF5 = 2) OR (SampF6 = 2))]*

#### **CHECK N43 (Soft)**

CHECK: Whether any problems in taking sample = no problem [(SamDifC = 1)]

```
| | You should not code 'No problems' as you did not fill all six tubes.  
| | Please amend or explain in a note <Ctrl M>.  
| |  
| END CHECK
```

END FILTER

#### **CHECK N44 (Hard)**

CHECK: (Whether any problems in taking sample = no problem) AND (Whether any problems in taking sample = at least one other answer)

[SamDifC.CARDINAL <> 1]

| If code 1 'No problem' is used then no other codes are allowed.

| END CHECK

## STANDING HEIGHT MODULE CHECKS

*IF Standing height - centimeters = RESPONSE [Height = RESPONSE]*

### **CHECK N45 (Soft)**

CHECK: (Standing height: decimal point = 0 [(FRAC (Height) = 0)])

| Please record height with one decimal digit, using the full stop as decimal point.

| If the decimal is zero, suppress this warning and continue.

| END CHECK

### **CHECK N46 (Soft)**

CHECK: ((Standing height < Lower limit\*) OR (Standing height > Upper limit\*))

|[((Height < HtLow) OR (Height > HtHigh))

| This person's height is [^Foot] feet [^Inch] inches. Is this correct?

| If correct, suppress this warning.

| END CHECK

| END FILTER

	Male	Female
*Lower limit - HtLow	165 - 0.132*HHAge	155.5 - 0.158*HHAge
*Upper limit - HtHigh	193 - 0.118*HHAge	179.1 - 0.132*HHAge

*IF (Whether estimated standing height will be in metric or imperial measures = RESPONSE) AND ((Estimated standing height - feet = RESPONSE) OR (Estimated standing height - inches = RESPONSE) OR (Estimated standing height - metres = RESPONSE)) AND (Final measured / estimated standing height - cm = RESPONSE) [((EhtCh = RESPONSE) AND ((EhtFt = RESPONSE) OR (EhtIn = RESPONSE) OR (Ehtm = RESPONSE))) AND (EstHt = RESPONSE)]*

### **CHECK N47 (Soft)**

CHECK: ((Estimated standing height < Lower limit\*) OR (Estimated standing height > Upper limit\*))

|[((EstHt < HtLow) OR (EstHt > HtHigh))

| This person's height is [^Foot] feet [^Inch] inches. Is this correct?

```

| | If correct, suppress this warning.
| |
| END CHECK
|
END FILTER

```

	Male	Female
*Lower limit - HtLow	165 - 0.132*HHAge	155.5 - 0.158*HHAge
*Upper limit - HtHigh	193 - 0.118*HHAge	179.1 - 0.132*HHAge

## WEIGHT MODULE CHECKS

*IF Weight = RESPONSE [Weight = RESPONSE]*

```

| CHECK N52 (Soft)
| CHECK: (Weight: decimal point = 0) [(FRAC (Weight) = 0)]
|
| Please record weight with one decimal digit, using the full stop as decimal point.
| If the decimal is zero, suppress this warning and continue.
|
| END CHECK
|
| CHECK N53 (Soft)
| CHECK: Weight = 130 [Weight = 130]
|
| You have recorded the weight as exactly 130.0 kg. Is this the actual weight, or
| should you have entered an estimate?
| If correct, press <S> to suppress this warning.
|
| END CHECK
|
| CHECK N54 (Soft)
| CHECK: ((Weight < Lower limit*) OR (Weight > Upper limit*))  

| [((Weight < WtLow) OR (Weight > WtHigh))
|
| This person's weight is [^Stone] stones [^Pound] pounds. Is this correct?
| Press <S> to suppress this warning.
|
| END CHECK
|
END FILTER

```

	Male	Female
*Lower limit - WtLow	0.039*HHAge + 52.37	0.043*HHAge + 40.32
*Upper limit - WtHigh	0.02*HHAge + 102.18	0.0375*HHAge + 89.4

*IF (Reason for not obtaining weight measurement = respondent weighs more than 130 kg) AND ((Estimated weight - stone = RESPONSE) OR (Estimated weight - kg = RESPONSE)) AND (Final measured or estimated weight - kg = RESPONSE)  
 [(NoWtBC = 6) AND ((EWtSt = RESPONSE) OR (EWtkg = RESPONSE)) AND (EstWt = RESPONSE)]*

**CHECK N55 (Soft)**

CHECK: Final measured or estimated weight <= 130 [EstWt <= 130]

| | Earlier the respondent was coded as being heavier than 130 kg (20 ½ stones).  
 | | Please change estimated weight or NoWtBC.

| | END CHECK

| END FILTER

*IF (Whether estimated weight will be in metric or imperial measures = RESPONSE)  
 AND ((Estimated weight - stone = RESPONSE) OR (Estimated weight - pounds = RESPONSE) OR (Estimated weight - kg = RESPONSE)) AND (Final measured or estimated weight - kg = RESPONSE)  
 [(EWtCh = RESPONSE) AND ((EWtSt = RESPONSE) OR (EWtL = RESPONSE) OR (EWtkg = RESPONSE)) AND (EstWt = RESPONSE)]*

**CHECK N56 (Soft)**

CHECK: ((Estimated weight < Lower limit\*) OR (Estimated weight > Upper limit\*))  
 | |[((EstWt < WtLow) OR (EstWt > WtHigh))

| | This person's weight is [^Stone] stones [^Pound] pounds. Is this correct?  
 | | If correct, press <S> to suppress this warning.

| | END CHECK

| END FILTER

	Male	Female
*Lower limit - WtLow	0.039*HHAge + 52.37	0.043*HHAge + 40.32
*Upper limit - WtHigh	0.02*HHAge + 102.18	0.0375*HHAge + 89.4

## WAIST MEASUREMENT MODULE CHECKS

**CHECK N57 (Hard)**

CHECK: Waist measurement = 1000 [Waist = 1000]

| | 1000 is above the valid range, please amend.  
 | | IF (Waist < 999) THEN WInch := Waist / 2.54

| | END CHECK

**CHECK N59 (Soft)**

CHECK: (Waist measurement <> [50 - 150]) AND (Waist measurement <> 999.9)  
[(Waist <> [50 - 150]) AND (Waist <> 999.9)]

| Are you sure?

| END CHECK

| *IF (First waist measurement <> measurement not obtained) AND (Second waist measurement <> measurement not obtained)*  
| [(DoneWst <> 1) AND (Waist1 <> 999.9) AND (Waist2 <> 999.9)]

| **CHECK N61 (Soft)**

| CHECK: Absolute difference between two waist measurements > 3 cm  
| [ABS (Waist1 - Waist2) > 3]

| | NURSE: The waist measurements are more than 3 cm apart. (^Waist1 / ^Waist2).  
| | If you have entered the measurement wrongly, please go back and amend.  
| | Otherwise, press <S> and take a third measurement.

| | END CHECK

| END FILTER

| *IF (First hip measurement <> measurement not obtained) AND (Second hip measurement <> measurement not obtained)*  
| [(DoneHip <> 1) AND (Hip1 <> 999.9) AND (Hip2 <> 999.9)]

| **CHECK N62 (Soft)**

| CHECK: Absolute difference between two hip measurements > 3 cm  
| [ABS (Hip1 - Hip2) > 3]

| | NURSE: the Hip measurements are more than 3 cm apart. (^Hip1 / ^Hip2).  
| | If you have entered the measurement wrongly, please go back and amend.  
| | Otherwise, press <S> and take a third measurement.

| | END CHECK

| END FILTER

REPEAT FOR ALL MEASUREMENTS [LOOP FOR I:= 1 TO 3]

| *IF Waist measurement = RESPONSE [Waist = RESPONSE]*

| | **CHECK N63 (Soft)**

| | CHECK: Waist measurement: decimal point = 0 [FRAC (Waist) = 0]

| | | Please record waist measurement with one decimal digit, using the full stop  
| | | as decimal point. If the decimal is zero, suppress this warning and continue.

| | | END CHECK

```

| |
| END FILTER
|
| IF Hip measurement = RESPONSE [Hip = RESPONSE]
|
| CHECK N64 (Soft)
| CHECK: Hip measurement: decimal point = 0 [FRAC (Hip) = 0]
|
| Please record hip measurement with one decimal digit, using the full stop
| as decimal point. If the decimal is zero, suppress this warning and continue.
|
| END CHECK
|
| END FILTER
|
END OF LOOP

```

#### **CHECK N65 (Soft)**

CHECK: (First waist measurement = Second waist measurement) AND (First waist measurement <> 999.9)  
 $[(\text{Waist1} = \text{Waist2}) \text{ AND } (\text{Waist1} <> 999.9)]$

The two measurements are exactly the same. Is this correct?

END CHECK

## LUNG FUNCTION MODULE CHECKS

#### **CHECK N67 (Soft)**

CHECK: Air temperature: decimal point = 0 [FRAC (LFTemp) = 0]

NURSE: Please record the temperature with one decimal digit, using the full stop  
as decimal point. If the decimal is zero, suppress this warning and continue.

END CHECK

#### **CHECK N68 (Soft)**

CHECK: (FVC reading (litres) > 7) AND (FVC reading (litres) <> 9.95)  
 $[(\text{FVC} > 7) \text{ AND } (\text{FVC} <> 9.95)]$

Are you sure? This value seems a bit high.

END CHECK

#### **CHECK N69 (Soft)**

CHECK: (FVC reading (litres): decimal point = 0) AND (FVC reading (litres) <> 0)  
 $[(\text{FRAC} (\text{FVC}) = 0) \text{ AND } (\text{FVC} <> 0)]$

| Please record the value with one decimal digit, using the full stop as decimal point.  
| If the decimal is zero, suppress this warning and continue.  
|  
END CHECK

**CHECK N70 (Soft)**

CHECK: FEV reading (litres) > 7 [FEV > 7]

|  
| Are you sure? This value seems a bit high.  
|  
END CHECK

**CHECK N71 (Soft)**

CHECK: (FEV reading (litres): decimal point = 0) AND (FEV reading (litres) <> 0)  
[(FRAC (FEV) = 0) AND (FEV <> 0)]

|  
| Please record the value with one decimal digit, using the full stop as decimal point.  
| If the decimal is zero, suppress this warning and continue.  
|  
END CHECK

**CHECK N72 (Hard)**

CHECK: FEV reading (litres) > 9.95 [FEV > 9.95]

|  
| FEV must be less than 9.95. Please correct.  
|  
END CHECK

**CHECK N73 (Soft)**

CHECK: (FVC reading (litres) = FEV reading (litres)) AND (FEV reading (litres) <> 0)  
[(FVC <> FEV) AND (FEV <> 0)]

|  
| Are you sure? Both values are the same.  
|  
END CHECK

**CHECK N74 (Soft)**

CHECK: (FVC reading (litres) <= FEV reading (litres)) AND (FVC <> 0)  
[(FVC <= FEV) AND (FVC <> 0)]

|  
| This is incorrect, FEV must be less than FVC. Please try again.  
|  
END CHECK

**CHECK N75 (Soft)**

CHECK: PF reading (litres per minute) > 700 [PF > 700]

|  
| Are you sure? This value seems a bit high.  
|  
END CHECK

**CHECK N76 (Hard)**

CHECK: PF reading (litres per minute) > 995 [PF > 995]

| PF must be less than 995. Please correct.

| END CHECK

| *IF Lung Function Measurement order = 1 [PLoop = 1]*

**CHECK N77 (Soft)**

| CHECK: (FVC reading (litres) <= 0) OR (FEV reading (litres) <= 0) OR (PF reading (litres per minute) <= 0) [(FVC<= 0) OR (FEV <= 0) OR (PF <= 0)]

| | If you are not going to obtain any readings at all please enter '9.95' at FVC.

| END CHECK

| END FILTER

| *IF (Whether technique for all three measurements was satisfactory = Yes)*

| *[(Techni1 = 1) AND (Techni2 = 1) AND (Techni3 = 1)]*

**CHECK N78 (Hard)**

| CHECK: How many technically correct blows were obtained <> All [LFResp <> 1]

| | All blows were correct technique. LFResp should be code 1.

| END CHECK

| ELSE

**CHECK N79 (Hard)**

| CHECK: How many technically correct blows were obtained = All [LFResp = 1]

| | Some blows were not correct technique. LFResp cannot be code 1.

| END CHECK

| END FILTER

| *IF Whether technique for at least one measurement was satisfactory = Yes*

| *[(Techni1 = 1) OR (Techni2 = 1) OR (Techni3 = 1)]*

**CHECK N80 (Hard)**

| CHECK: How many technically correct blows were obtained = [All, some] [LFResp = [1, 2]]

| | LFResp should be code 2 as some blows were correct technique.

| END CHECK

```

| ELSE IF Whether technique for all three measurements was satisfactory = No
| [(Techni1 = 2) AND (Techni2 = 2) AND (Techni3 = 2) )

| CHECK N81 (Hard)
| CHECK: How many technically correct blows were obtained = Some [LFResp = 2]
| |
| | None of the blows were correct technique. LFResp cannot be code 2.
| |
| END CHECK

END FILTER

```

## BALANCE MODULE CHECKS

```

CHECK N82(Hard)
CHECK: Time full tandem stand held (seconds) >= [^30 / 10] [MmFTTi >= [^30 / 10]]
|
| NURSE: This is more than [^30 / 10] seconds. Please re-enter time if is less than
| [^30 / 10] seconds, otherwise arrow back to MmFTRe and enter code 1.
|
END CHECK

```

## CHAIR RISE MODULE CHECKS

```

IF Time to complete five rises (seconds) = RESPONSE
[MmRRFTi = RESPONSE]

| CHECK N83 (Soft)
| CHECK: Time to complete five chair rises (seconds) < 5 [MmRRFTi < 5]
| |
| | Are you sure? This time seems rather low.
| | Please check and amend your coding if necessary.
| |
| END CHECK

| CHECK N84 (Soft)
| CHECK: Time to complete five chair rises (seconds) > 20 [MmRRFTi > 20]
| |
| | Are you sure? This time seems rather high.
| | Please check and amend your coding if necessary.
| |
| END CHECK

END FILTER

```

*IF Time to complete ten rises (seconds) - only eligible if under 70 yrs =  
RESPONSE [MMRRTTi = RESPONSE]*

**CHECK N85 (Soft)**

CHECK: Time to complete ten chair rises (seconds) < 10 [MMRRTTi < 10]

| Are you sure? This time seems rather low.  
| Please check and amend your coding if necessary.

END CHECK

**CHECK N86 (Soft)**

CHECK: Time to complete ten chair rises (seconds) > 40 [MMRRTTi > 40]

| Are you sure? This time seems rather high.  
| Please check and amend your coding if necessary.

END CHECK

END FILTER

*IF (Time to complete ten rises (seconds) - only eligible if under 70 yrs =RESPONSE)  
AND (Time to complete five rises (seconds) = RESPONSE)  
[(MMRRTTi = RESPONSE) AND (MmRRFTi = RESPONSE)]*

**CHECK N87 (Hard)**

CHECK: Time to complete ten chair rises (seconds) <= Time to complete five chair  
rises (seconds) [(MMRRTTi <= MmRRFTi)]

| This time should be greater than the time recorded to complete five rises.  
| Please amend.

END CHECK

END FILTER

# **ENGLISH LONGITUDINAL STUDY OF AGEING (ELSA)**

***HEALTH AND LIFESTYLES OF  
PEOPLE  
AGED 50 AND OVER***

**P8096  
WAVE 6**

**NURSE VISIT  
PROJECT INSTRUCTIONS**

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# 1 ABOUT THE STUDY

## 1.1 Background and introduction to the study

The English Longitudinal Study of Ageing (ELSA) is a study of people aged 50 and over and their partners. The aim is to interview the same group of people every two years to explore **the health, lifestyles and financial situation** of people as they grow older. The field name of the study is ‘health and lifestyles of people aged 50 and over’.

Over time, the study will allow us to explore many questions, for example:

- How does people’s health and level of disability change over time?
- What explains who has good health in later life and who does not?
- When do people retire and how do they plan for their retirement?
- Do people have enough savings to provide for their older age?
- How do people’s activities, relationships and quality of life change over time?
- How do changes in memory and concentration affect well being?
- What is the relationship between these different factors?

ELSA is modelled on a similar study in the US (the Health and Retirement Study, HRS). A parallel study, the Survey of Health, Ageing and Retirement in Europe (SHARE), completed its third wave of data collection across Europe in 2009. Equivalent studies are being developed in many other countries of the world, most recently Korea. The various longitudinal studies of ageing being carried out will be used to compare experiences across countries and understand how national policies and contexts affect people’s lives.

ELSA began with Wave 1 in 2002-2003 (interview only) and subsequent waves have taken place every other year so we can learn how people’s lives change over time. Once every other wave (once every four years) we carry out a nurse visit to collect key physical measures. Wave 4 was completed in July 2009 (interview and nurse visit) and Wave 5 finished in May 2011. Wave 6 contains both a core interview and nurse visit and the mainstage is due to go live in May 2012.

Half of the funding for ELSA has been provided by the US National Institute on Aging which also funds the Health and Retirement Study mentioned above. The remaining funding for the study has been provided by a consortium of UK government departments including Department for Work and Pensions, Department of Health and the Office for National Statistics (ONS).

The study is being carried out as a collaboration between NatCen, the Department of Epidemiology and Public Health at University College London (UCL), the Institute for Fiscal Studies (IFS) and the University of Manchester. The principal investigator in the research team is Professor Sir Michael Marmot, Head of the Department of Epidemiology and Public Health at UCL.

You (and respondents) can find out more about the study at [www.natcen.ac.uk/elsa/](http://www.natcen.ac.uk/elsa/).

## **1.2 Summary of the survey design**

There are two parts to the survey: an interviewer-administered interview and a visit by a nurse to carry out measurements. Co-operation is entirely voluntary at each stage. Someone may agree to take part in the interviewer stage, but decide not to take part in the nurse visit stage. The results from previous waves suggest that most respondents are willing to take part in the nurse visits and find them a positive aspect of the study.

The interviewer and nurse assigned to a survey point will work together as a team.

An advance letter is sent to each selected respondent by the office a week prior to fieldwork briefly explaining the survey and its purpose. At the end of their interview, the interviewer will then give the respondent information leaflets about the nurse visit and DNA sample (only those sample members in the refreshment sample will be asked for a DNA sample, this is covered in detail later on these instructions) to provide the respondent with more detail.

Fuller details of the sample are given in Section 2. See Sections 4, 5 and 7 for information about associated documents.

## **1.3 The interviewer visit**

Interviews are administered using Computer-Assisted Personal Interviewing (CAPI).

For each household there is a short **Household Questionnaire** that checks who is still living with the ELSA sample member(s) and collects some basic facts about them and the household. For each selected individual respondent there is an **Individual Questionnaire**, which covers a range of issues including physical health, mental health, economic circumstances etc, and includes two short self-completion paper questionnaires. It is a very long interview, lasting an average of one hour and 45 minutes per person. In effect, this means that in one person sessions, the personal interview takes, on average, one hour and twenty-five minutes. In two-person (concurrent) sessions, they take an average of two hours and five minutes. The length of interviews varies and some respondents will have received very long personal interviews before you visit.

At the end of the interview, the nurse visit is introduced and the interviewer either arranges an appointment for the nurse to visit a few days later or tells the respondent that the nurse will telephone them to arrange the visit (depending on the method you agree with the interviewer).

During their interview respondents will be asked to complete two self completion questionnaires – a core self-completion (**orange**) and a green (male) or purple (female) sexual relationships self-completion, either before, during or after their interview. If any of the self-completions are left behind with the respondent then the interviewer may arrange with the respondent for you to collect it when you do your visit. The interviewer will record this in their admin block and the information will be transferred to you (via the e-NRF which is explained in more detail later) if you need to collect any of the self completion questionnaires you will be reminded about this by the CAPI at the beginning of your visit. If the respondent has lost either of their self-completion questionnaires, please give them a new one to complete. If the

respondent has completed the self-completion questionnaire(s), please ensure that it has the respondent's serial number on and post it back with other documents.

There are a few other documents that interviewers give to respondents that you may encounter. The interviewer should have dealt with most of the issues about these documents and so in most cases you will not have to do anything. However, in a small minority of cases the respondent may ask for your help with them. If you send any documents back to the office please make sure that they have the correct serial numbers and person numbers written on them.

1. New consent form for links to administrative data (**yellow**) – Some respondents may have been left this form to think about. If they have filled it in then please check it is complete and return it to the office. The respondent should keep the white carbon copy.
2. New consent form for linkage to NHS register (**pink**) – same as above.

In the very unlikely event that a respondent wants to withdraw their consent for links to administrative data they should write on a piece of paper (or their copy of the consent form):

- their serial number, check letter, person number
- their full name and address
- 'I withdraw my consent for NatCen to link my survey data to health and/or financial administrative data'
- their signature and the date.

Please then return this to the office.

#### **1.4 The nurse visit**

All **CORE MEMBERS** who are interviewed at Wave 6 are eligible for a nurse visit, except for those who are interviewed by proxy. A nurse will be allocated to each sample point to work with the interviewer.

The interviewer should contact you after each interview they do to let you know the following information:

- Whether the respondent(s) agreed or refused to have a nurse visit
- The appointment time (if the interviewer is making the appointment) or any information about the respondent's availability
- Changes to the respondent's address or telephone number
- Parking instructions if relevant
- Any concerns they have about whether the respondent is able to give blood or fast
- Any other information about the respondent which may be of use – e.g. reluctance or concerns about particular measures

**You should telephone the respondent in ALL cases before the visit in order to arrange or confirm the appointment and to discuss preparation for the visit.**

The nurse visit is carried out in the respondent's home and involves a series of measurements:

- blood pressure
- grip strength – this is a measure of upper body strength, during which the respondent is asked to squeeze a grip gauge up to three times with each hand
- blood samples – fasting if possible
- standing height
- weight
- waist measurement
- lung function – this is a measure of how much air respondents can blow out from their lungs, and is measured using a spirometer
- balance – respondents are asked to stand in three different positions for up to 30 seconds
- leg raise – respondents under 70 years old are asked to lift one foot off the ground for up to 30 seconds
- chair rises – this is a measure of lower body strength, during which respondents are asked to stand up from a firm chair without using their arms. If they succeed, they are asked to stand up and down as quickly as they can for either five rises if they are aged 70 and over, or up to ten rises if aged 69 and under
- hair sample - a sample of hair is collected from the respondent in order to measure the respondent's level of cortisol, a stress hormone.

If a cause for medical concern is identified through blood pressure or blood sample measures collected during the nurse visit, then the respondent's GP will be notified (if the respondent gives prior permission).

Should you have any other immediate concerns for the respondent's health then you must advise the respondent to contact their GP urgently. You should then complete an incident report form to notify the office of your concerns and the action you have taken / advice given to the respondent.

Four of the measures we will be taking are *physical performance measures*: grip strength, balance measures, leg raise and chair rises. Taken together with the gait speed (or timed walk) measure which is carried out during the personal interview, these performance tests provide a very good measure of the respondent's physical well-being and are an excellent way of tracking change in health over time.

## 1.5 Survey materials

The following is a list of documents and equipment you will need for this survey. Before starting work, check that you have received the following supplies.

Document	Colour
Sample Cover sheet	White
NRF pad	White
Survey leaflet	Blue
Nurse visit leaflet	Purple
Genetics testing leaflet	Orange
Nurse appointment card	Yellow
Consent booklet	Green
Measurement record card	Lilac
Frankfort plane card	White
Protocol card for balance measure and leg raise	White
Protocol card for chair raise and grip strength	White
Protocol card for hair collection	White
Stopwatch instructions	White
Lung function protocol checklist	White
Sharps disposal letter	White
Coding prescribed medicines booklet	Orange
Hair sample dispatch note	White
Barcode labels	White
Address labels for NRFs	N/A
Spare core self-completion questionnaires	Orange
Spare sexual function self-completion questionnaires (male)	Green
Spare sexual function self-completion questionnaires (female)	Purple
Self-completion polyope envelopes (pre-paid return to Brentwood)	N/A

## Equipment

The equipment that is required for this project is as follows:

- BNF 61
- Stopwatch
- Popper fixing tape measure
- Digital Thermometer and probe (and spare battery)
- Calibrated Omron, small, medium and large cuffs (and Omron mains charger)
- NDD Easy On Spirometer, spiroettes, nose clips
- Stadiometer
- Spirometer Calibration Syringe (to be kept at home and used to calibrate Spirometer prior to working each day)
- Grey adapter for calibration syringe
- Calibrated Tanita Body Fat Scales (weight only option to be used) and spare batteries
- Gripometer
- Blood sample and dispatch equipment
- Hair sample and dispatch equipment
- Clipboard (for use when completing consent forms)

It is particularly important that you sort out any problems with equipment as soon as possible. We could lose a lot of measurements (e.g. weight) because of equipment not working. If there is a problem with your equipment please contact Brentwood equipment store straight away.

With regards to the Tanita Body Fat Scales – Please ensure that you have some spare batteries with you in case you need to replace them. If you need to change the batteries, please claim the money back in the usual way. The batteries used are commonly available. We don't want to lose measurements because of faulty equipment, and you might have to go back to a household if this happens.

The remainder of the equipment is described in more detail later in the sections on the measurement protocols and in your standard NatCen nurse protocols.

You will receive ELSA specific equipment which will be sent out to your home addresses from Brentwood. However much of the equipment above is used on Understanding Society and so you will only receive those items of equipment or consumable supplies that are ELSA specific. You must also therefore, make sure that you have enough consumable supplies (e.g. for blood sampling; lung function etc) to cover the extent of your allocated Fieldwork across the projects you might be working on while also working on ELSA.

#### **Notifying the Police is not required**

Nurses are no longer **required to call** at the local police station to register their presence in the area before starting fieldwork or register via the local police non-emergency. Respondents can seek reassurance by visiting our website [www.natcen.ac.uk/ELSA](http://www.natcen.ac.uk/ELSA), by calling the NatCen freephone number 0800 652 4574, or by emailing [ELSA@natcen.ac.uk](mailto:ELSA@natcen.ac.uk).

## **2 SAMPLE INFORMATION**

### **2.1 Sample source**

The sample for ELSA was originally drawn from the Health Survey for England (HSE). The HSE is a study conducted jointly by the Department of Epidemiology and Public Health, UCL, and the National Centre for Social Research, on behalf of the Department of Health. The major advantage of the HSE sampling source is that extensive data had already been collected about respondents' health (details of morbidity, lifestyle, diets and blood samples). Most ELSA sample members will have had a nurse visit at HSE, as well as at ELSA Wave 2 and ELSA Wave 4.

At Wave 6 the sample consists of two groups of sample members: existing sample and Wave 6 refreshment sample.

### **2.2 Existing sample**

The existing sample consists of individuals who first participated in ELSA either at Wave 1 or for the first time at Wave 3. The HSE years selected for Wave 1 were 1998, 1999 and 2001. The majority of our sample was first interviewed as part of the HSE in one of these years. Most were then interviewed a second time at ELSA Wave 1. Wave 1 is considered to be the baseline for ELSA. Most of the Wave 1 sample would have completed a Wave 2 and Wave 3 interview, a Wave 2 nurse visit and some also a Life History interview, however, some sample members may have missed one or more of these interviews. And some sample members have become eligible by moving into an ELSA household since the time of the HSE interview and so may have joined the study later than others.

The existing sample also includes those individuals who were introduced to ELSA at Wave 3 when we refreshed the younger sample members (ages 50-53) so that our sample continued to include the full range of age groups. These sample members were taken from HSE 2001, 2002, 2003 and 2004. We selected people aged 50 to 53 and their Old/Young partners.

### **2.3 Wave 6 refreshment sample**

There is a new refreshment sample at Wave 6, this time covering people aged between 50 to 55 years.

For Wave 6, we identified people from households that took part in HSE 2008 who could potentially become core members, along with their cohabiting Young or Old partners. The interviewer may also interview new partners of core members who have joined the household since HSE.

We are issuing 2,253 individuals in 1,311 households as part of the refreshment sample. The points you have been allocated will consist of a mixture of existing and refreshment sample.

## **2.4 Core Members and Partners**

There are two types of respondents who are eligible to take part in the study: **Core Members** and **Partners**. The interviewer will attempt to interview all Core Members and Partners. The Core Members are the people who we are most interested in and we want as many Core Members as possible who are interviewed in person at Wave 6 to have a nurse visit.

Partners are not eligible for a nurse visit and we do NOT want you to carry out a nurse visit with Partners, however if a Partner is adamant that they want a nurse visit (to you or the interviewer) we are allowing you to carry out nurse visits in this situation as we know that some Partners are unhappy that they were not allowed a nurse visit at Wave 2 or Wave 4. You may take all the measures for partners that they wish.

### **3 LIAISING WITH YOUR INTERVIEWER PARTNER**

You and your interviewer partner will need to work very closely together, so a good working relationship is essential. **The interviewer has been told to make contact with you to set this up before they begin interviewing respondents.** (See Appendix 1 for a summary of this procedure).

The formal lines of communication between you and your interviewer are described in the next sections. The informal lines are equally important. An important part of the interviewer's job is to keep you fully informed about the outcomes of all his/her attempts to interview people, whether or not they are productive. We want to minimise the length of time between the interview and your visit. **You will therefore need to talk to each other frequently by telephone.** Make sure you let your interviewer know the best times to get in touch with you (which you can write on the appointment preference form).

You should decide together with the interviewer how you are going to make appointments for your visits, i.e. if the interviewer is going to make them for you or if you are going to make them with the respondent by telephone after the interview.

If the interviewer is going to make the appointments for you, let him/her know the days and times on which you are available to see respondents again using the nurse appointment preference form. Make sure you keep a careful note of the times you give her/him. You will need to liaise frequently in order to update this information. **Never** put the interviewer in the situation where (s)he makes an appointment for you in good faith, only to discover you have a prior commitment. Give the interviewer as much flexibility as possible for making appointments. People lead very busy lives nowadays. They are doing something to help us and may not give it the greatest priority.

The interviewer has been asked to give you good warning of all appointments made for you. Make sure the interviewer knows the best times to reach you by telephone. If you want more than two days' notice, tell the interviewer so that she/he can phone through other appointments too.

If you are making the appointments yourself then it may also be helpful for you to give the interviewer a rough idea about your availability so that he/she can let the respondent know.

The interviewer will do everything possible to provide you with an even flow of work and to minimise the number of visits you have to make to an area, but this will be limited by respondent availability. Discuss with the interviewer the time you will need to travel to the area so that he/she can take account of this. Plan together how best to make this appointment system work.

You may also wish to discuss practical details such as parking arrangements.

Where possible, you should be able to see all the people who need a nurse visit in a household one after the other on the same visit. Each visit we expect will take around 75 minutes per person. You will of course also need some time to introduce yourself to the household and generally set up equipment. The duration of the visit is likely to vary slightly from nurse to nurse and with respondents of different ages.

Information about each household and details of any appointments that have been made will be passed to you by the interviewer by telephone and the interviewer-nurse link will also be established once the interviewer has transmitted their case back – you will only receive details of those households on your laptop where you need to carry out a nurse visit (see Nurse Link section below). **However, interviewers will also phone after each interview as well.** You will have a nurse sample cover sheet detailing all the households that have been issued in your area and where nurse visits may be required. Please use this to keep an eye on how your cases are going and to identify any cases which you are expecting to visit, but have not appeared on your laptop via the nurse link.

### 3.1 Nurse Sample Cover Sheet

You will have a nurse sample cover sheet detailing all the serial numbers that you could receive from the interviewers via the nurse link. The sample cover sheet helps you keep track of the addresses in your point.

At the end of your assignment, if there are any households which you have not received via the nurse link, or for which you have not received a No Nurse Visit form, please call the interviewer to check what the outcome was on those addresses – it is likely that they were not covered by the interviewer, and this information will be useful to us, however there is the possibility that there has been a problem with the nurse link and we will need to know about this – please contact Brentwood straight away in this instance.

The nurse summary sheet has the following information:

- Point number.
- Field area.
- Interviewer name and number.
- Serial number and address of each household.

For each household you will need to enter:

- The outcome for the household:
  - A – At least one person agreed to the nurse visit
  - B – No nurse visit was required
- The final outcome code for that household
- The date(s) you posted the documents back and transmitted the data

### **3.2 The Nurse Link**

The nurse link is how information on a household requiring a nurse visit is transferred from the interviewer's laptop to your laptop. All the addresses you could be allocated start on the interviewer's laptop. When the interviewer confirms that the respondent would like a nurse visit during the interview the address is transferred to your laptop, once the interviewer has transmitted the case back.

It takes one working day for an address to appear on your laptop after the interviewer has transmitted the address back, so for example if an interviewer transmits a case back on the Monday morning, on the Tuesday morning the address will appear on your laptop. The nurse link is dependent upon you logging on frequently; we would like you to connect to the host at least twice per week.

Another thing to be aware of is that the respondents' address transmitted to you via the nurse link maybe different to the issued address on the sample coversheet – this is because the respondents may have moved. Similarly if an interviewer finds that the respondents in an issued household have split up, instead of receiving one serial number you will receive two, so for example if the two respondents in household 299991111 split up you will receive serial number 299991111 and serial number 299991112. **Always use the address and respondent details which have been transmitted via the nurse link as this is the most up to date address.**

You will only receive those addresses where at least one respondent has agreed to a nurse visit. You will NOT receive addresses which do not need a nurse visit for example where the interviewer has not managed to get an interview (as the respondents refused the main interview or they are now ineligible), or if all Core Members have refused the nurse visit. So, at the beginning of fieldwork before the interviewer has transmitted any addresses back your ELSA slot will be blank, addresses will only start appearing once the interviewer has transmitted addresses which require a visit from you.

If you experience any problems with the nurse link please phone Brentwood as soon as you discover the problem.

We hope that the new nurse link will make it easier for you to keep track of your work. Most of you should be used to this system, as it is now in operation on the Health Survey for England.

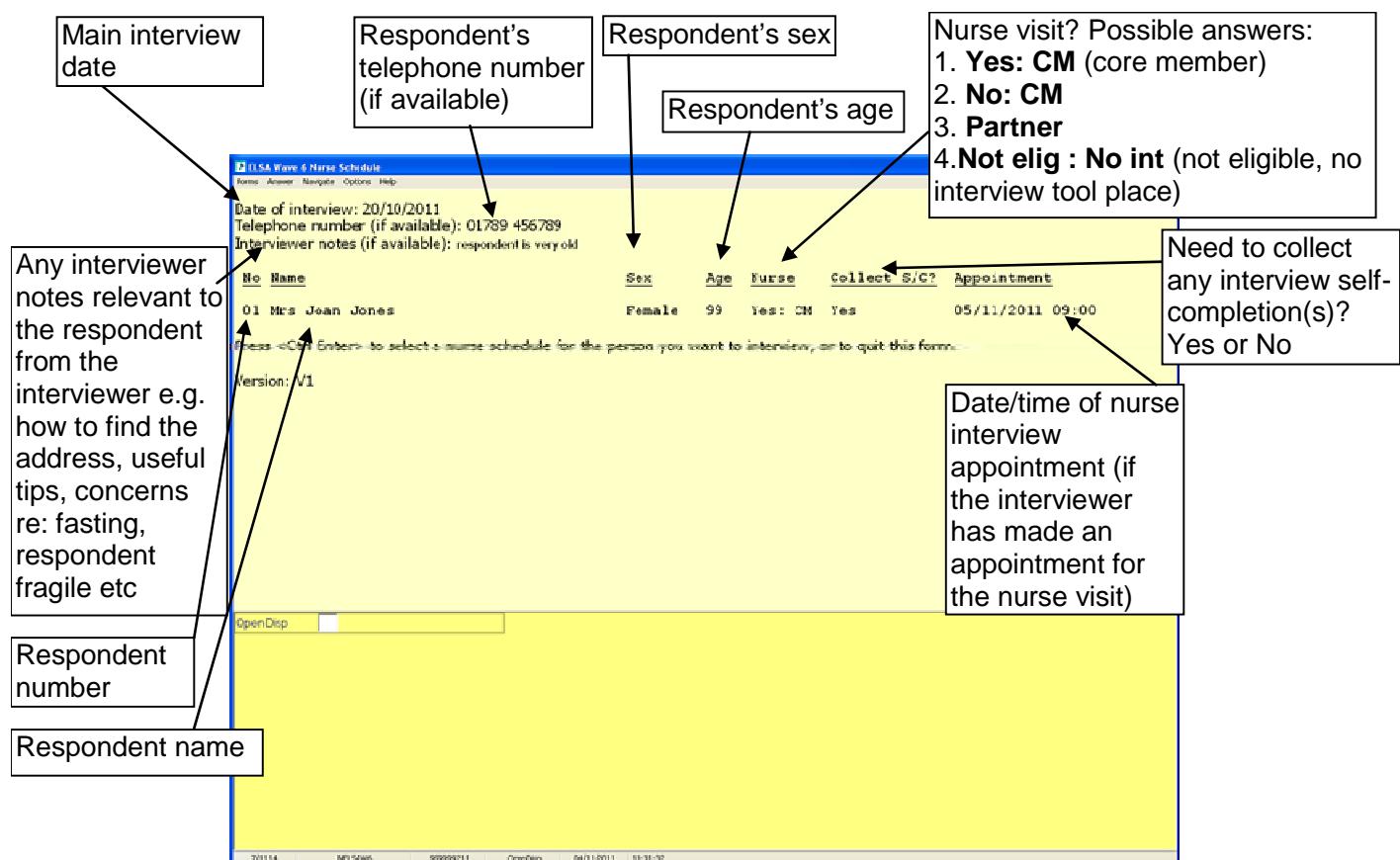
### 3.3 The e-NRF& the NRF

### **A. The e-NRF**

We have changed the way that information is transferred from the interviewer to you – we are not using the NRF but instead using an eNRF – which has been used on other nurse surveys. Certain information which used to be recorded by the interviewer on the NRF and posted to you is taken from the main interview and transferred to you via the eNRF, such as the names and details of the people in the household.

The eNRF will appear at the beginning of the nurse interview. You must open up the eNRF for the household before you visit.

Below is a screen shot of the ELSA eNRF.



There is one e-NRF **per household** and it contains the following information:

- Telephone number (s)
- Person number(s)
- Name = title, first name, surname(s)
- Sex (es)
- Age (s)
- Nurse = Nurse visit needed? Answers could be yes / no / partner / not elig – no int (not eligible – no interview)
- Collect self completion = nurse needs to collect self-completions? Y / N
- Appointment date and time = if an appointment was made by the interviewer for the nurse
- Interviewer notes = any notes relevant to the nurse from the interviewer, for example any useful tips you have about how to find the address, if this is difficult, and write in change of address details

#### ***B. The NRF Pad***

All information from the eNRF must be transferred by hand by you to the paper NRF pad before you visit the household. Transfer all information from the NRF pad to the admin block and transmit back when the nurse interview has been completed. It is important that all relevant information is transferred from the NRF pad to the admin block as we are not keeping the NRF pad. After use, shred the completed NRF pad.

Please turn over for sections of the NRF pad explained.

**Date of nurse interview**

appointment (if the interviewer has made an appointment for the nurse visit or to be used if you have made an appointment)

Main Nurse Appointment		
Day	Date	Time

**NatCen**  
Social Research

FOR NURSE USE ONLY

**Trip name** (code received when you've transmitted your completed interview)

P8096

**Health and Lifestyles of people aged 50 and over  
(ELSA) NURSE RECORD FORM (NRF)**

TRIP NAME:

SLOT NAME:

Interviewer name:

Interview date:

ADDRESS LABEL

INTERVIEWER NOTES FROM E-NRF:

**Interviewer notes** space to record respondent details or any useful notes from the interviewer

**Address label**  
space to record the respondent's address. Labels will be provided

CONTACT/WEB = TELEPHONE NUMBER &amp; USEFUL TIPS FROM E-NRF

**Contact names...** space to record the contact names, age, telephone numbers and any useful tips from the interviewer

1. TELEPHONE CALL RECORD (Record all telephone calls, even if no reply)

3 Wk Appt deadline:

Call No.	Date DD/MM	Day of week	Call Start Time 24hr Clock	TELEPHONE CALLS RECORD Record all telephone calls, even if no reply	Call Status (Enter codes only)	Call End Time 24hr Clock
1						
2						
3						
4						
5						
6						
7						
8						

Call Status codes: 1 = No reply 2 = Contact made 3 = Appointment made 4 = Any other outcome (please record this in the 'Telephone Calls Record' column)

2. VISIT RECORD (Record all visits to the house, even if no reply)

3 Wk completion deadline:

Visit No.	Date DD/MM	Day of week	Visit Start Time 24hr Clock	VISITS RECORD Record all visits, even if no reply	Visit Status (Enter codes only)	Visit End Time 24hr Clock	Visit followed by respondent from E-NRF Time 9/10 AM
1							
2							
3							
4							
5							
6							

**Visit record**  
please record any visits to the respondent, even if there is no reply

**Telephone call record** please record any telephone calls with the respondent, even if there is no reply

**Call Status** - Please use the codes below the grid:

- 1 = No reply
- 2 = Contact made
- 3 = Appointment made
- 4 = Any other outcome (please record this in the 'Telephone Calls Record' column)

**Appointment and completion deadlines**

COMPLETION OUTCOMES												
		If Not Completed Enter Why (Enter code)										
PERSON NUMBER	FULL NAME & TITLE (MR/MRS/MS)		SEX 1=m, 2=f	AGE	PERSON STATUS (Enter codes below only)*	NEED TO COLLECT GENETICS	NURSE TO COLLECT SELF - COMPLETION	APPT. DATE	APPT. TIME	NURSE SCHEDULE COMPLETED	A - Main reason** (see box below)	B - Reasons for refusal*** (see box below)
			1 2			Y/N	Y/N		:	Yes / No		
			1 2			Y/N	Y/N		:	Yes / No		
			1 2			Y/N	Y/N		:	Ye		
			1 2			Y/N	Y/N		:	Ye		
			1 2			Y/N	Y/N					

\*Person status: 1 = Yes – Core Member; 2 = Refusal – Core Member; 3 = Not Eligible – Core Member; 4 = Partner

**Completion Outcome**  
please complete the outcome(s) for the nurse visit. A and B do NOT need to be filled in if there was a completed nurse visit

**IF NOT COMPLETED CODES**

**A - MAIN REASON**

No contact made	82
Refusal by person	83
Proxy refusal	84
Broken appointment	85
III (at home)	86
III (in hospital)	87
Away (other reason)	88
Other	89

**IF REFUSAL (CODES 83 OR 84) - B - REASONS FOR REFUSAL**

Own doctor has information	0
Given enough time already to this survey / expecting too much	1
Too busy, cannot spare the time	2
Had enough of medical tests / medical profession at present time	3
Worried about what nurse may find out / tempt fate	4
Scared of medical profession / particular medical procedures (e.g. blood sample)	5
Not interested / can't be bothered / no particular reason	6
Other reason	7

**Person Status**  
Please complete the outcomes(s) for whether there should be a nurse visit based on the information on the eNRF using the codes directly below the grid:  
1 = Core member agreed to nurse visit  
2 = Refusal core member  
3 = Respondent either not interviewed or died  
4 = Partner requested a nurse visit

**TRANSMITTED**

**Nurse to collect self-completion?**  
Y = if at least one self-completion to pick up, either core or sexual activities and relationships

## **More detail on the NRF Pad**

### Person number (p.2)

In the column to the left of each person's name is their **Person Number**. Whenever you enter a serial number for that person you must use this and **only** this Person Number.

### Person status code (p.2)

On the grid on page 2 you will complete the nurse visit status as either 1, 2, 3 or 4. **Contact only those persons who are codes 1** – these are the household members who agreed both to be interviewed **and** to see a nurse. Code 1 indicates that a core member agreed the nurse visit. Code 4 indicates that the respondent is a Partner and not eligible for a nurse visit. You can interview a partner but only if they request a nurse visit. Code 2 indicates a Core Member was interviewed but refused to see you. Code 3 indicates a Core Member could not be interviewed (e.g. they were mentally incapable, refused, etc).

Occasionally you will find that someone in the household with code 2 (Core Member who refused nurse) or code 3 (Core Member who was not interviewed) decides they want to have a nurse visit after all. If they are code 2 you **can** take the measurements, as these people have already completed a full interview. Make a note on the NRF Pad explaining what has happened. If they are code 3 (i.e. Core Member who was not interviewed) you **cannot** take any measurements. Under no circumstances must you measure an individual before an interviewer has completed a full interview on CAPI.

### Self-completion(s) (p.2)

The column 'Nurse to collect self-completion' should be completed from the eNRF to show whether you need to collect the self completion paper questionnaire(s). You may have to collect the main questionnaire and/or the sexual activity and relationships paper self-completion and return them to the office. An envelope was provided by the interviewer for the respondent to use for completed questionnaires. You should not aid the respondent with any specific queries they have about the sexual activity questionnaire. These queries should be directed to the interviewer or to Brentwood.

You should complete the rest of the NRF as you begin contacting the address:

- Enter the calls and visits record as normal. Include the date when you called and what the status of that call/visit was.
- Once you have made an appointment with the respondent (or if an interviewer has made one for you) there is space on the top of the front page to record the date of the appointment.
- Enter the outcome code for all respondents eligible for nurse visit on p.2 including the reason for refusal using the codes below the main grid. This is very important for us to understand.
- For all productive households – enter for whom you obtained a consent booklet and a completed self-completion questionnaire on p.2

Please shred the NRF pad once you have finished with that address, you do NOT need to return it to the office but remember to transfer all the information from the NRF pad to the admin block.

## 4 WHAT THE RESPONDENT KNOWS ABOUT YOUR VISIT

The interviewer introduces your visit at the end of the interview by reading out the following:

*There are two parts to this survey. You have just helped with us with the first part. We hope you will also help us with the second part, which is a visit by a qualified nurse to collect more medical information and carry out some measurements. (I would like to make an appointment for the nurse to come round and explain some more about what is required. May I suggest some dates and times and see when you are free?)*

The box below shows the general points given to interviewers to help them answer questions about your visit.

*Information you may need to know if the respondent asks you questions about the nurse visit*

- It is an integral part of the survey - the information the nurse collects will make the survey even more valuable.
- The nurse is highly qualified. They have all had extensive experience, working in hospitals, health centres etc, and have also received further training to undertake the specific measurements within the ELSA survey.
- If the respondent wants, they will be given the results of the measurements carried out by the nurse. If they like, this information will also be sent to their GP.
- They are not committing themselves in advance to agreeing to everything the nurse wants to do. The nurse will ask separately for permission to do each test - so the respondent can decide at the time if they do not want to help with a particular one.
- An independent medical ethics committee has been consulted and has given approval to the survey.

If a person is reluctant, the interviewer is asked to stress that all they wish to do is arrange for you to go and explain what is involved. They point out that by agreeing to see you they are not necessarily agreeing to take part in all, or any, of the tests. We hope your general professional approach will convince nervous respondents more effectively than can an interviewer.

Unlike other studies, all respondents will be aware that they will be invited to give us a blood sample before the nurse visit. There are two reasons for this. Firstly, respondents will be asked to fast (if appropriate) before giving blood and, as you will only be visiting them once, they need to be told about this beforehand. Secondly, two of the blood samples are taken for the purpose of genetics research and so we are required by law to give respondents enough time to decide whether they want to give consent for their DNA to be extracted from a blood sample you may take. We are only taking a genetics sample from the Wave 6 refreshment sample.

At the end of the interview each respondent is given a yellow appointment record card describing preparation needed for your visit (see below), and respondents in the refreshment sample are also given an orange genetics leaflet which explains the

genetics research. The interviewer will also give each eligible respondent a lilac nurse leaflet which briefly describes the purpose of your visit.

#### **4.1 Appointment Record Card**

The interviewer will give each eligible respondent a yellow appointment record card. This confirms the appointment time (if appropriate) and reminds them that we would like them to avoid eating, smoking, drinking alcohol or doing any vigorous exercise for 30 minutes before you arrive. It also asks them to wear light, non-restrictive clothing.

A copy of the appointment record card is in your workpack for your information. You will need to go through it very carefully with the respondent when you telephone them before your visit (see Section 6.1 and Appendix 2).

Since we are asking some respondents to fast for the blood samples, the card also gives information about what they can eat on the day of their appointment. If the nurse visit is before 1pm, the respondents are asked not to eat or drink anything (apart from water) on the day of the appointment. If the nurse appointment is between 1pm and 6pm, the respondents can have a light breakfast of items listed on the appointment record card before 8am but are not to eat or drink anything (except water) after 1pm. If the appointment is after 6pm, they are instructed that they can have a usual breakfast and a light lunch of items listed on the appointment record card before 1pm. They are asked not to eat or drink anything (except water) after 1pm.

If you ask a respondent to fast, you should tell them to drink water during the fast. This is also written on the appointment record card to remind respondents.

**We would ask that you let the respondent know that you will be contacting them again the night before the visit to encourage them to remind them of the fasting rules (if appropriate) and to emphasises the importance of drinking water if they are fasting.**

## 5 WHAT TO DO ON INITIAL CONTACT

### 5.1 Telephoning respondents before the visit

Your initial contact with respondents should be by telephone and should be within the first week of being fed forward the information from the interviewer via the e-NRF. You should keep your introduction short and concise. Some of the people you approach may be hesitant about continuing with the survey, and if you say too much you may simply put them off. The general rule is keep your initial introduction brief, simple, clear and to the immediate point. An example of how to introduce yourself on the telephone is given below.

Say who you are:

*"I am a nurse called ...."*

Say who you work for:

*"I work for The National Centre for Social Research"*

Remind respondents about their interview:

*"A few days ago you saw an interviewer about the English Longitudinal Study of Ageing and (s)he told you that I would like to come and see you." (Remind respondent of appointment, if already set up by the interviewer).*

For most people this will be enough. They will be happy to talk to you about preparations for your visit and all you will have to do is explain what your visit will cover and what you want them to do. Others will be reluctant and need further persuading. Build on what has gone before. Be prepared to answer questions about the survey. Some respondents may have forgotten what the interviewer told them about the survey's purpose or what your visit involves. You should therefore be prepared to explain again the purpose of the study and about your visit. You may also need to answer questions, for example, about how the household was sampled. Some points you might need to cover are shown in the following box.

- *who you are working for* – the National Centre for Social Research (NatCen), University College London (UCL) and the Institute for Fiscal Studies (IFS)
- *who is funding the study* – half of the funding is from various government departments and the other half is from the National Institute on Aging in the United States.
- *why the study is being carried out* – (see Section 1).
- *what you are going to do* – (see Section 1.4).
- *how the respondent was selected* (see Section 2) Once a household has been selected, we cannot replace it with another. This is particularly important for ELSA as it is a panel study and we are trying to measure how people change over time.
- *the confidential nature of the study* – individual information is not released to anyone outside the research team.
- *how much time you need* – this varies a bit but it is best to allow around

75 minutes for each person plus another 15 minutes per household (to put equipment away and so on).

Only elaborate if you need to, introducing one new idea at a time. Do **not** give a full explanation right away - you will not have learned what is most likely to convince that particular person to take part. Do not quote points from the boxes except in response to questions raised by the respondent.

**Be careful to avoid calling your visit a "health check".** One of the most common reasons given for respondents refusing to see the nurse is "I don't need a medical check - I have just had one". Avoid getting yourself into this situation. You are asking the respondent to help with a survey.

If the respondent is willing for you to carry out your visit you will need to go through the appointment record card with them and do the following:

1. Confirm or arrange the date and time of your appointment.
2. Explain that they should not eat, smoke, drink alcohol or do any vigorous exercise for 30 minutes before your visit.
3. Ask them to wear light, non-restrictive clothing and to avoid wearing thick belts or long garments that will prevent you from seeing their feet (this is important for the physical performance measures).
4. Remind them to drink a good amount of water if they are fasting.
5. Find out if they are eligible to have a blood sample taken by asking if they:
  - have a clotting or bleeding disorder
  - have had a fit / convulsion in the last 5 years - Ensure they DO NOT give blood if they have suffered a fit in the last 5 years.
  - are taking anticoagulant drugs (such as Warfarin, protamine or acenocoumarol)
  - are pregnant (not very likely with ELSA respondents!).
6. If they are eligible to have a blood sample taken then you will need to determine if they are eligible to fast. Respondents will NOT be eligible to fast if they:
  - are aged 80 or over
  - are diabetic and on treatment
  - are malnourished or otherwise unfit to fast in your judgement (One of the pieces of information you may want from the interviewer when they telephone you after their visit is if the respondent seems particularly frail).

If they are eligible and willing to fast, then you will need to explain the fasting rules (see Section 5.1). Emphasise that they can take their medication as normal.

## 5.2 Being persuasive

It is essential to persuade reluctant people to take part, if at all possible.

You will need to tailor your arguments to the particular household, meeting their objections or worries with reassuring and convincing points. This is a skill that will develop as you get used to visiting respondents. If you would like to discuss ways of persuading people to take part, speak to your Team Leader, Nurse Supervisor (or your Area Manager).

### **5.3 Broken appointments**

If someone is out when you arrive for an appointment, it may be a way of telling you they have changed their mind about helping you. On the other hand, they may have simply forgotten all about it or had to go out for an urgent or unexpected reason.

In any case, make every effort to re-contact the person and fix another appointment. Try telephoning the respondent to find out what the problem is. Allay any misconceptions and fears. Make them feel they are important to the success of the survey. A chat with your interviewer partner might help. (S)he might be able to give you an indication of what the particular respondent's fears might be, and may have notes that would tell you when would be the most likely time to find the respondent at home. Keep on trying until you receive a definite outcome of some sort.

### **5.4 The number of calls you must make**

You are asked to keep a full account of each call you make at a household on the **Nurse Record Form Pad**. Complete a row for each call you make, include telephone calls to the household as well as personal visits. Note the exact time (using the 24-hour clock) you made the call, and the date on which you made it. In the notes section keep a record of the outcome of each call - label your notes with the call number.

You must make at least 1, but ideally **4 personal visits per respondent** before you give up. Each of these calls must be at different times of the day and on different days of the week and are ideally made when passing through or near the area when working on either that point or for another project in the same or neighbouring post codes. However, we hope you will make a lot more than four calls to get a difficult-to-track down respondent. If you fail to make contact, keep your Team Leader updated with your efforts and reasons for non contact.

### **5.5 Approaching respondents in institutions**

It is possible that a respondent who is eligible for a nurse interview has moved into an institution (i.e. a nursing or a care home). Respondents in institutions are still eligible for a nurse visit as long as they had their core interview in person (not via proxy).

If any of your respondents have moved into an institution you must ensure that the interviewer has provided you with the details of the contact person at the institution, such as a Care Home Manager. Please contact this person (before contacting the respondent) to explain the purpose of the survey and content of the nurse interview. It is important that you explain the measurements that are involved and check whether it would be safe to carry out each of them with the respondent.

If the institutional contact agrees to the nurse visit you will need to check that the respondent is contactable by phone, so you can explain the nurse visit, and if so that you have the correct details for them. If you are unable to contact the respondent by telephone you will need to visit the respondent in person before their nurse interview to explain what it involves and what they need to do to prepare for the nurse visit (e.g. fasting).

Please bear in mind when visiting respondents within institutions that although they have all been capable of completing an interview with the interviewer, as the nurse you must make your own assessment as to whether they are capable of understanding and consenting to the nurse measurements, as well as physically capable. If you feel that a procedure has not been understood please DO NOT continue with or take the measurement.

## **6 CARRYING OUT THE NURSE VISIT**

### **6.1 Who to visit**

You can only interview and measure respondents who have completed a full individual interview with the interviewer and who are core sample members (or are Partners who have requested a nurse visit). Respondents must have completed this interview **before** you see them.

### **6.2 Nurse visit documents**

The Nurse Schedule is on computer (CAPI). As well as the computer schedule, you will complete two other documents during the interview itself: the consent booklet and the measurement record card (which includes grip strength). The consent booklet contains the forms the respondent has to initial and sign to give written consent for:

- blood pressure readings to be sent to their GP
- blood samples to be taken
- blood test results to be sent to their GP
- blood test results to be sent to respondent
- blood sample for storage for future analysis
- blood sample for DNA extraction and storage
- lung function readings to be sent to their GP
- hair sample to be collected

### **6.3 General tips on use of the documents and computer program**

Read out the questions in the Nurse Schedule **exactly as worded**. This is very important to ensure comparability of answers. You may think you could improve on the wording. Resist the temptation to do so. Enter the code number beside the response appropriate to that respondent indicating the answers received or the action you took.

Some questions take the form of an instruction to you to enter something without needing to ask the respondent a question. In most cases these instructions have "NURSE:" written at the beginning of them.

When you get a response to a question which makes you feel that the respondent has not really understood what you were asking or the response is ambiguous, repeat the question. If necessary, ask the respondent to say a bit more about their response.

## **6.4 Preparing the documents/computer**

**Before you leave home**, you should connect your computer to the host (separate instructions about this are provided) and pick up any work via the nurse link which is ready for you. Remember you will only have information about households which require a nurse visit from you.

When you enter the nurse schedule you should check that it is the right one by looking at the serial number and viewing the eNRF. You should also check carefully that you entered the respondent's correct serial number on all the documents.

## **6.5 Introducing your measurement tasks**

The interviewer will have introduced your visit, but has been told to give only a brief outline of what it is about. (S)he will have told respondents that you are the best person to explain what your visit is about.

So, at the beginning of your visit, before you make any measurements, you will need to explain what you hope to do during your visit and to reassure nervous respondents that every stage is optional.

If the respondent wishes, they and their GP will be given their blood pressure and lung function readings. If they consent to giving us a blood sample, they will be given the results of the blood test (by letter) and these can also be sent to their GP if they wish.

## 7 THE CONSENT BOOKLET

**Never** prepare the consent booklet in advance of your visit. There is a serious danger that you will use the wrong one for the wrong person. It is all too easy to do in the stress of the moment.

Use a black or blue pen when completing the consent booklets, and ensure that signatures are always in pen, not pencil. Use capital letters and write clearly. Do not erase any of the personal information. If necessary, cross out errors and rewrite so that any corrections can be seen.

Write the address at which you are interviewing in the box at the top of the Consent Booklet. Stick a serial number barcode in the appropriate box. Be sure you use the correct barcode for the respondent – check their name and date of birth on the sheet of barcode labels. Accuracy is vital.

Enter your Nurse Number at Item 1, the date on which you are interviewing at Item 2 and the Point Number at Item 3.

***Complete Items 4 to 6 before you start using the computer to collect the information from the respondent.***

At Item 4 record the **full** name of the respondent. We will be using this to write a thank-you letter to the respondent giving them their test results (if they wish), and to write to their GP (with their permission) to give him/her their test results. The name by which the GP knows the respondent is checked, if appropriate, during the interview. This may, for example, be a maiden name.

Ask the respondent for his/her date of birth and enter this in the boxes provided at Item 6. The respondent may say they have already given it to the interviewer. Explain that you have been asked to get it again as it will help ensure the right documents get put together.

***Items 7 to 9 are completed during the course of your interview.***

At Item 7 you write in the name, address and telephone number of the respondent's GP if the respondent gives consent for blood pressure, lung function and/or blood test results to be sent to the GP. If a respondent does not know the name of her/his GP, leave the top line blank (otherwise the computer will send out nonsense letters like *Dear Dr. Ash Grove Practice*).

Fill in the full name and address of the GP on each individual's consent booklet for a household, even when all members have the same GP. Each individual is treated separately once they reach the office.

At Item 8 record how complete you believe the GP address to be. If you are sure that a letter posted out of the area to that address would arrive, then ring code 1. However, should the respondent not have available a full address and telephone number then you are required to complete this yourself at home, when completing your admin. for this address. The quickest way of doing this is by looking up the details through the NHS Choices services web search. Go to [www.nhs.uk](http://www.nhs.uk) and place the respondent's post code into the 'Health Services Near You' section. Press the

red 'Find GP Practices'. The search will give you the GP practices within a 5 mile radius to the respondent's post code. This activity is accounted for in the fees for this project. (See Appendix 3)

Item 9 is very important. Throughout the visit you record here the outcome of your requests for permission for:

- a) The blood pressure results to be sent to the GP
- b) Blood samples to be taken
- c) Blood sample results to be sent to their GP
- d) Blood sample results to be sent to the respondent
- e) Blood sample storage for future analysis
- f) Blood sample for DNA extraction and storage
- g) Lung function results to be sent to the GP
- h) Hair sample to be collected

By the end of the interview every respondent should have **EIGHT** codes ringed at Item 9.

There are **FIVE** different consent sections contained in the consent booklet:

- 1 Blood pressure results to GP.
- 2 Blood sample:
  - Blood sample to be taken
  - NatCen to inform GP of blood result.
  - Remaining blood to be stored for future analysis.
- 3 Extraction and storage of DNA for use in future medical research studies.
- 4 Lung function results to GP.
- 5 Hair sample to be taken

The CAPI will prompt you to complete these different consent forms as you go through the nurse schedule. You will be prompted to:

- ask the respondent to read, initial, sign and date the form;
- to circle the appropriate consent code on the front of the Consent Booklet.

The Consent booklet also contains two despatch notes for the blood samples. These are described in Section 12D.

**NOTE:** Please use the clipboard you have been provided with when you and the respondent are completing the consent forms – this is to prevent initials and signatures from transferring through the carbonised pages onto the next consent form.

## **8 THE NURSE SCHEDULE**

### **8.1 Organising the interview**

Before setting out to carry out any interviews, you must check to make sure that you have received the household information through the Nurse Link via the connection to the host. You will not be able to conduct the interview without having done this.

You should also have contacted the respondent(s) before visiting the household to establish whether bloods are likely to be taken and whether he/she should fast (see Section 5.1).

When you arrive at the household, before starting to carry out your interview, check whether any of the people you have come to see have eaten, smoked, drunk alcohol or done any vigorous exercise in the last 30 minutes. This could affect their measurements. If someone has done any of these things, arrange to see the other eligible member(s) of the household first in order to give time for the effects to wear off. In addition you will be asked by the CAPI to check whether the respondent has fasted for the specified time for the blood test.

Similarly if someone in the household wants to eat, smoke or drink alcohol in the near future (e.g. one person is going out and wants a snack before they leave) then try to measure that person first. Adapt your measurement order to the needs of the household.

You may feel that if you try to rearrange things in this way, you are likely to lose an interview with someone you may not be able to contact again. In such cases, give priority to getting the interview, rather than rearranging the order.

### **8.2 Getting into the Nurse Schedule**

Once you have logged on to CMS, the first menu displayed is the **MAIN MENU** screen from which all subsequent menus and screens are selected. The **MAIN MENU** allows you to select several options on the work you want to commence. To access ELSA nurse work, you will need to select **Live Interview**. This display's the projects/slots by survey month that have been loaded on to your laptop.

To get into the nurse schedule, select **P8096** which will then display a screen with all serial numbers of all the addresses in your sample (plus related information) which have been covered by the interviewer and require a nurse visit. Use the arrow keys to select the household you would like to work on, then press <Enter>.

You are now in the nurse schedule and ready to start entering data.

You MUST practice at home before 'going live'; at the **MAIN MENU** you can select working at home **\_PRACTICE INTERVIEW\_** select project. The screen displays all the address serial numbers for practice interviewing (calls will not be made/entered when practice interviewing). **Do not** use a practice interview slot for a visit to a respondent's home.

## **8.3 Household information**

The first thing you may be asked to do is to enter the first line of the address.

### ***HHDate***

This is necessary to allow the computer to calculate the respondent's age at the time of the interviewer visit, as this is the age that dictates which sections of the schedule apply. You will find this date at Q.3 on the NRF.

### ***More***

At the end of the information for each individual, the computer will ask you if there is anyone else who was seen by the interviewer. If you enter 'yes', another row on the household grid will be created for you to complete. If you enter 'no', that signifies that you have entered details of all eligible persons in that household.

If, after entering 'no' at *More*, you realise that there are other household members to be added, you can do this by pressing <End> then the Up Arrow key, and changing *More* from 'no' to 'yes'.

### ***OpenDisp***

This will summarise the information about individuals who were interviewed by the interviewer, as these are the only individuals who *you* can interview.

For all individuals who were seen by the interviewer, *OpenDisp* shows the person number, name, sex, age, and whether or not a nurse visit was agreed.

### ***SchDisp***

In addition to the details given at *OpenDisp*, this gives you the schedule number for each respondent. Once you have checked the grid at *SchDisp*, press <Ctrl+Enter> to bring up the Parallel Blocks screen (see Section 9.15), from which you can either exit the household (by pressing <Alt+Q>), or select an individual schedule (by highlighting the schedule and pressing <Enter>), or go into the admin block (see Section 9.14).

N.B. Any partners will have their own parallel blocks in case you need to do an interview with them, however you will only need to do this when partners have requested a nurse visit, it is not a matter of course.

## **8.4 Individual information**

The individual information should be collected when you are in the household.

### ***Info***

If the respondent has already agreed to a nurse visit, this question will check that you wish to interview him/her. You should code 'yes' if you want to carry on with the interview straight away, and 'no' if the respondent has changed his/her mind about being interviewed. If neither of these options apply, you should press <Ctrl + Enter> and select one of the other individual schedules.

### ***RefInfo***

If the respondent did not agree to a nurse visit, you still have to enter a small amount of information. This is because people sometimes change their minds about seeing the nurse, once they see other household members being measured. If a ‘refused’ respondent does have a change of heart, code ‘yes’, and the schedule will continue. If you code ‘no’, you will be taken right to the end of the schedule.

### ***StrtNur/NurDate/DateOK***

The start time and date are necessary because the computer’s internal time is not always right. The date is also used to check the respondent’s age.

### ***NDoBD - DispAge***

These questions act as a check that you are in the right schedule, and that you have recorded the respondent’s date of birth correctly.

### ***IntSc1 - IntSc4***

Please check page 2 of the NRF to see whether or not the interviewer arranged with the respondent for you to collect the Blue self-completion questionnaire and code this at IntSc1. Check with the respondent whether they have completed it yet or not:

- If the respondent has already completed the self-completion questionnaire and it has been sent back to the office then code 1 at IntSc2. You do not need to do anything further about this.
- If the respondent has completed the questionnaire but not yet returned it, you will be instructed by the CAPI to put the questionnaire in a pre-paid envelope and post it back to the office.
- If the respondent has not yet completed the questionnaire, then please ask them to complete it. If they no longer have the questionnaire then please give them a new copy.

## **8.5 Prescribed Medications**

### ***MedCNJD***

Respondents are asked whether they are taking any medications prescribed by a doctor or nurse.

Later questions will ask you to record the names of the prescribed medications

## **8.6 Statins**

### ***Statins***

Respondents are asked whether they are taking statins (drugs to lower cholesterol), which have been bought over the counter from a pharmacist. If the respondent is taking a statin that has been prescribed by a doctor, this should be recorded at the question *MedCNJD*.

## 8.7 Blood pressure and Drug coding

### **BPMOD-BPOffer**

Everyone (except those who are pregnant) is eligible for blood pressure measurements. The protocol in the NatCen standard nurse protocols explains how to take blood pressure readings. You will be taking three readings.

**BPCONST** - If you code 'refused' here, the computer will skip you past the measurement. You should code 'unable' if the respondent is prepared to co-operate, but for some reason it is not possible to take the measurement (e.g. the Omron is broken or there is some physical reason). In either case, you will be asked to record the reason.

**ConSubX** - Blood pressure can be higher than normal immediately after eating, smoking, drinking alcohol or taking vigorous exercise. This is why respondents are asked to avoid doing these for 30 minutes before you arrive. As already suggested (in Section 9.1) if you can juggle respondents within a household around to avoid having to break this "half-hour" rule, do so. If you are able to do this remember to change your answer at this question so it shows that they haven't done the activity (i.e. smoked) in the past 30 minutes. But sometimes this will not be possible and you will have to take their blood pressure within this time period - in which case enter all the codes that apply.

**OMRONNo** - Always note down the NatCen serial number for the Omron you are using. Sometimes we identify an equipment problem and wish to be able to track down all readings that have been taken using the particular piece of equipment.

**CuffSize** - See the NatCen standard nurse protocols for how to select the correct cuff size. If you have a particularly large respondent and the large adult cuff is too small, contact the Equipment store or contact your Nurse Supervisor. S/he holds a small stock of "thigh" cuffs which can be used to take the blood pressure of very large people. These are used on the arm in the same way as the ordinary cuffs. If you need to use one of these cuffs, record in the CAPI *Extra large adult cuff needed* by opening a memo. If you are then able to revisit the respondent to conduct this measure only, you would need to code the BP as unable to be obtained and then insert the measures again at a later date via the 'View and Amend' menu prior to fully transmitting the finished household. If the respondent has a very small arm then you may use a small cuff and record this in a memo in the CAPI.

### **AirTemp – (See also the NatCen standard nurse protocols)**

Blood pressure can be affected by air temperature. For this reason, we wish to measure the air temperature in the room at the time blood pressure is being taken. You are supplied with a digital thermometer and probe.

Wait until you have got your respondent resting with their blood pressure cuff on. Then set up the thermometer on a surface close to where they are sitting. Immediately prior to taking blood pressure, record the temperature. Then switch the thermometer off so that the battery does not run flat.

Remember to check that the thermometer has reached its final reading. It can take several minutes to do this if it is, say, moved from a cold car to a warm house.

If the air temperature is not within the specified range (15–25°C), please try to alter it – perhaps by opening or closing windows and/or doors. Or identify within a CAPI memo as to why the temperature might be outside of the expected readings.

**BPR****e****d**y – This instruction reminds you of the five minute wait, and to check that the ‘Ready to measure’ symbol is lit before taking the readings. It also reminds you that during the wait you can prepare the documents, and equipment if appropriate, for the rest of Nurse Visit. The documents are:

- Consent booklet
- Grip strength measurement card
- Measurement record card

**DrCod2** – If the respondent is taking prescribed medication, you will be asked to code this medication using BNF 61 and the Coding Prescribed Medicines booklet. You access the drug coding screen via the parallel blocks.

**BPR****e****d**a – Record the blood pressure readings in the order shown on the screen. Double check each entry as you make it to ensure you have correctly entered the reading. If you have got to this point and then become aware that you are not going to be able to get a reading after all, you should enter ‘996’ then press <End>. This will automatically enter ‘999’ in each box, to save you having to type it in 12 times.

**YNoBP** – If you did not get any full readings, you are asked to enter one of three codes. Code 1 should be used if you attempted to take a blood pressure measurement but were unsuccessful. Use code 2 if you did not attempt to take blood pressure for reasons other than a refusal. If you got a refusal, use code 3.

**NAttBPD** – If you failed to get a reading, or you only managed to obtain one or two readings, enter a code to show what the problem was. If necessary, write in full details at *OthNBP*.

**DifBPC** – Code whether the readings were obtained without problem, or whether any problems were experienced.

**GPR****e****gB**, **GP****s****e****n****d**, **C****o****n****s****f****r****m****1** – If you obtained at least one blood pressure reading, you are asked to collect details of the respondent’s GP. If the person agrees to the results going to their GP, turn to the second page of the consent booklet (**Consent Form - Blood Pressure to GP**). Explain you have to get written consent in order to send the blood pressure readings. Ask the respondent to read, and initial the form. Then ask them to turn to page 5 of the booklet, print their name, sign and date in the space provided. You should do the same in the spaces provided for your details.

Then turn to the front of the consent booklet and ring consent code 01. Ask the respondent for the name, address and telephone number of their GP. If possible, obtain the postcode. Record this at items 6 and 7 of the consent booklet. If your respondent does not know their GP’s full address and/or postcode, look it up through the NHS services website (see Appendix 3) or in the relevant telephone directory later (public libraries hold telephone directories for the whole country). Do your best to get hold of the phone number as well – including the local area code. You may find it useful to keep a notebook containing the address details of local GPs given by previous respondents, as if you are working in the same area, you will almost certainly come across several people with the same GP, and this will save

you having to keep looking up the same GP's details if a respondent cannot give them to you.

**BPOffer** - Offer the respondent his/her blood pressure readings. If (s)he would like them, enter them on the measurement record card (MRC), which you will have in your work packs. Remember to fill in the details on the front of the MRC including your name and the date of the nurse visit. If a respondent has a raised blood pressure you must give her/him advice based on the result. This will be calculated by the computer and will appear on the screen for you to read out exactly as written. Write any advice given onto the MRC.

It is **not** the purpose of this survey to provide respondents with medical advice. Nevertheless, many respondents will ask you what their blood pressure readings mean. The NatCen standard nurse protocols contain detailed guidelines on how to inform respondents about their blood pressure readings. Make sure you are very familiar with this guidance. We wish it to be strictly followed. It is very important that as little anxiety as possible is caused, but at the same time we have a duty to advise people to see their GPs if their blood pressure is raised.

## 8.8 Grip Strength

### **MMGSWill**

The preamble explains what will be required for the grip strength measurement. Then all respondents are asked if they are willing to take part in the measurement. If they are unwilling or unable, you will be asked to record the reason.

### **MMGSDom**

This question asks about which is the respondent's dominant hand. If the respondent is ambidextrous then enter either hand and put a note about this in a memo.

### **MMGSSta**

Check that the respondent has not had a recent hand injury, or surgery to either hand in the last six months. Record whether the respondent has the use of both hands. If they do not have the use of one (or both) of their hands, specify which hand(s) they are unable to use - If the respondent has use of only one hand please record this as the dominant hand, and if the respondent is unable to use either hand, the measurement will be stopped.

### **MMGSInt**

It is important you explain and **demonstrate** the test procedure. Position the respondent correctly, adjust the gripometer to their hand size (see the NatCen standard nurse protocols) and ensure it is reset to zero. Explain the procedure again and demonstrate it. Let the respondent have a practice with one hand. Be sure to reset the gripometer to zero afterwards.

### **MMGSN1-MMGSD3**

Record three measurements for each hand if the respondent has use of both hands, starting with the reading for the non-dominant hand, followed by the reading for the dominant hand. If the respondent does not have use of both hands, record the three measurements for the hand that the respondent does have the use of.

### **MMGSTP – MMGSP<sub>ro</sub>**

Record the respondent's position during the test and any problems taking the measures.

## 8.9 Blood sample

### ***B1Intro***

All sample members who give consent are eligible for a blood sample to be taken. The only exceptions to this rule are people with clotting or bleeding disorders, people with a history of fits or convulsions, people who are currently on anticoagulant drugs (eg Warfarin, protamine, acenocoumarol) and pregnant women.

### ***ClotB***

Explain the purpose and procedure for taking blood. Check if the respondent has a clotting or bleeding disorder or is on anticoagulant drugs, such as Warfarin, protamine, acenocoumarol. These are very uncommon. If you find someone with these problems, **do not** attempt to take blood, even if the disorder is controlled.

By clotting or bleeding disorders we mean conditions such as haemophilia and low platelets, ie thrombocytopenia. There are many different types of bleeding/clotting disorders but they are all quite rare. The reason these respondents are excluded from blood sampling is that:

- a) the integrity of their veins is extremely precious
- b) we do not wish to cause prolonged blood loss

For the purposes of blood sampling, those who have had, for example, a past history of thrombophlebitis, a deep venous thrombosis, a stroke caused by a clot, a myocardial infarction, or an embolus are NOT considered to have clotting disorders.

Some respondents might be taking anticoagulant drugs such as Warfarin, protamine, acenocoumarol which thins their blood so that they do not stop bleeding easily. If this is the case, then do not take a blood sample. You will need to check this with respondents, particularly with the elderly.

Aspirin therapy is not a contraindication to blood sampling.

If you are uncertain whether a condition constitutes a contraindication to blood sampling, the Survey Doctor will be happy to answer your queries.

### ***Fit***

Respondents who have had a fit in the last five years (eg epileptic fit, convulsion) should not be asked to provide a blood sample.

### ***BSWill***

This is the initial verbal consent to take a sample. If the respondent refuses, you will record why and the module will be skipped.

### ***FastAsk***

You should have been in contact with the respondent before visiting the household to determine if it was safe for them to fast. If you advised them that it was not safe to fast you should code 2. If the respondent is aged 80 or over they should not fast, but this will be automatically calculated and this question will not appear. In either case you should take a sample which would not include the fasting (grey top) tube.

If you determined that it *was* safe for the respondent to fast, or did not manage to contact them, you will now ask further questions about when and what they last ate.

#### ***DateLEat - BIReady***

These questions determine whether the respondent can give a fasting sample, i.e. whether they have fasted for a sufficiently long time and have eaten only the food specified on the appointment record card. See Section 12D for more detail. Note that the CAPI calculates this from the time on your laptop, so it is important to check that your laptop displays the correct time and date. However, we have now added new questions to check that the CAPI's calculations about how many days and hours ago the respondent last ate are correct. If they are not correct you should code this in the CAPI and it will ask you to give the correct details which will be used to work out whether the respondent is eligible to give a fasting blood sample or not.

#### ***BSCons Code14 – Obtaining consents***

As blood taking is an invasive procedure we need to obtain written consent as well as verbal consent to take it. This has to be obtained from the respondent **in all cases**. If you **cannot** obtain written consent, the computer will direct you to ring consent codes 04, 06, 08, 10, and 12 on the consent booklet and filter you round the remaining questions.

There are three further written consents we wish to obtain in relation to blood sampling – consent to send the results to the GP, consent to store a small amount of the blood, and consent for the extraction and storage of DNA from the sample. You should seek to obtain all these consents before you take any blood. On **no** account should you ever take blood before you have obtained written consent to do so from the respondent.

Small quantities of blood are being stored in special freezers in order that further analysis may be undertaken in the future. Future analysis will definitely **not** involve a test for viruses (e.g. HIV (AIDS) test). We are only collecting DNA samples for the refreshment sample members. The questions on the CAPI take you step by step through all the procedures for obtaining consents. Make sure you follow these carefully – recording consent codes as instructed and giving reasons for refusals, if applicable. The CAPI will direct you which sections to complete and what to code on the front of the consent booklet.

In summary:

- Try to reassure respondents about the process, and be prepared to answer their concerns. You will need to explain to the respondent the need for written consent and how important it is.
  
- Obtain consent to take a blood sample.
- Obtain consent to send results to GP.
- Obtain consent to store blood.
- Obtain consent for extraction and storage of DNA – Wave 6 refreshment sample only
- Check that you have ringed the correct consent codes on the front of the consent booklet.

#### ***Taking a blood sample***

Having checked that you have all the appropriate signatures, and ringed the appropriate codes, you are ready to take the blood sample. See the protocol in Section 12D for how to proceed. The CAPI will only direct you to take samples for which the respondent has given consent and a fasting sample if eligible (***TakeSa1***).

If you obtain a sample, note down any problems at *SamDifC* and at the venepuncture questions at the end of the CAPI. Record which sample tubes you have filled at ***SampF1 – SampF6***.

If you do not manage to get any blood, you will record this at ***SampF1 – SampF6*** and then explain why not at ***NoBSM***. If you do not get any blood ring consent codes 04, 06, 08, 10, and 12 on the consent booklet. If you have already ringed codes 03, 05, 07, 09, and 11 you should cross these codes out and circle codes 04, 06, 08, 10 and 12 on the consent booklet instead.

If you obtain a blood sample, remember to invert the tubes gently 5 times and then label the blood tubes immediately. Double check you have used the correct barcode label on the tubes and consent booklet. Complete the despatch note, remembering to record if the respondent has fasted or not at question 7, and pack the dispatch pack.

Then ask the respondent if (s)he would like to receive the results of the blood sample analysis (***SnDrSam***). If yes, ring consent **code 07** on the front of the consent booklet. If not, ring **code 08**. If they wish to receive their results, you should tell them that this will take about three months. Note that information from DNA testing will NOT be given to respondents or to their GP as we cannot generate meaningful data at an individual level.

Encourage the respondent to eat something now to stop them feeling faint for the physical measures (***BloodBreakFast***)

## 8.10 Height and weight

You should be able to measure the height and weight of most of the respondents. In some cases it may not be possible or appropriate to take the respondent's height and weight. Do not force a respondent to be measured if it is clear that the measurement will be far from reliable but whenever you think a reasonable measurement can be taken, do so. You are asked to record the reliability of your measurements at ***RelHite*** and ***RelWaitB***. Examples of people who should **not** be measured are:

- Chairbound respondents should not have their height measured.
- If after discussion with a respondent it becomes clear that they are too unsteady on their feet for these measurements.
- If the respondent finds it painful to stand or stand straight, do not attempt to measure height.

It is strongly preferable to measure height and weight on a floor which is level and not carpeted. If all the household is carpeted, choose a floor with the thinnest and hardest carpet (usually the kitchen or bathroom).

Read the preamble at the question called **HtIntro**. If further explanation is required, say that although many people know their height and weight, these measurements are not usually up to date or are not known with the precision required for the survey. The reason for wanting to know accurate heights and weights is in order to relate them to other health measures.

If the height or weight is refused or not attempted, the respondent is asked to estimate their height or weight. You are given a choice of whether to enter their estimate in metric or imperial measurements.

#### ***RelHite and RelWaitB***

You are asked here to code whether you experienced problems with the measurement and, if you did, to indicate whether you felt the end result was reliable or unreliable. As a rough guide, if you think the measurement is likely to be more than 2 cms (3/4 inch) from the true figure for height or 1 kg (2 lbs) from the true figure for weight, code as unreliable.

### **8.11 Waist circumference**

#### ***WHMod-WHRes***

Waist measurements are taken from all respondents except those who are chairbound and those who have a colostomy or an ileostomy. The measurement is taken twice, to improve accuracy. Fuller details of how to do this are given in the NatCen standard nurse protocols.

Record the measurement to the nearest millimetre. Always record the response to one decimal point (e.g. 95.4). The computer will not allow you to enter a response without a decimal point, so even if the measurement comes to, say, exactly 96cm, you must enter '96.0'. If you do enter a measurement ending in '.0', the computer will ask you to confirm this.

If your second measurement differs from the first by more than 3cm, the computer will give you an error message, and instruct you to either amend one of your previous responses, or to take a third measurement.

*Amend a previous response if:* you have made a mistake when entering the measurement, eg entered '65.2' instead of '75.2'.

*Take a third measurement if:* there is another reason for the measurements being different.

If in doubt, take a third measurement rather than over-writing one of the previous two. The computer will automatically work out which two to use. If anyone refuses to have these measurements taken, record why.

At **WHRel**, record how reliable the waist measures are, and whether any problems that were experienced were likely to increase or decrease the measurement. This information is important for analysis of the results. As a general rule, if you believe

that the measurements you took are 0.5cm more or less than the true measurement because of problems you encountered (e.g. clothing the respondent was wearing), this should be counted as unreliable.

Offer to write the measurements on the Measurement Record Card for the respondent.

## 8.12 Lung function

### ***HaSurg- LFInfo***

Introduces Lung Function module and screens for whether respondent is eligible for lung function measurements.

### ***LFPrac***

Connect Spirometer and Launch Software, complete the procedure as per Standard Nurse Protocol for NDD Easy On Lung Function

### ***Quality***

Quality of lung function measurements taken, derived from lung function software.

### ***Lung Function Consent***

If you obtain a lung function reading ask these questions. If you have not already asked the respondent, check if they are registered with a GP. Check with the respondent if the results can go to their GP. If they agree, turn to **Lung function to GP** in the consent booklet. Ask the respondent to initial and date as described in the CAPI.

Then turn to the front of the consent booklet and ring consent **code 13**. If you have not already done so, ask for the name, address and telephone number of the GP (see the section on blood pressure for collecting the GP's details).

## 8.13 Balance, Leg raise and Chair rise

### ***Balance***

### ***MmBCInt***

Explain the purpose of conducting the balance tests, saying that you will describe and demonstrate each exercise in turn.

### ***MmBCSc – MmBCCh***

These questions check whether the respondent has had any recent surgery, injury or any other health problem that may affect the balance measurements and remind you to take extra care that it is safe for the respondent to do the measures.

### ***MmSSInt – MmSSNa***

Go through the protocol for the side-by-side stand and record whether the respondent was able to hold this position for 10 seconds, and if not, record the time of how long the position was held. If the side by side stand was not attempted, code the reason.

### ***MmSTInt – MMSTNa***

These questions are asked if the respondent was able to hold the side-by-side stand for 10 seconds. Go through the protocol for the semi-tandem stand and record whether the respondent was able to hold this position for 10 seconds, and if not, record the time of how long the position was held. If the semi-tandem stand was not attempted, code the reason.

***MmFTInt – MmFTNa***

These questions are asked if the respondent was able to hold the semi-tandem stand for 10 seconds. Go through the protocol for the full tandem stand and record whether the respondent was able to hold this position for the desired amount of time (10 or 30 seconds depending on the age of the respondent – see Section 12I), and if not, record the time of how long the position was held. If the full tandem stand was not attempted, code the reason.

***Leg raise***

***MmLOInt – MmLSNa***

These questions are asked if the respondent is aged 69 or under and successfully passed the side by side stand. Go through the protocol for the Leg raise and record whether the respondent was able to hold this position for 30 seconds, and if not, record the time of how long the position was held. If the respondent can perform this exercise for 30 seconds then repeat with the respondent's eyes shut. If the leg raise with eyes open or eyes closed was not attempted, code the reason.

***Chair rise***

***MmCRAv***

The availability of a suitable chair is asked as respondents can only participate in this exercise if there is a suitable chair available (as described in Section 12I).

***MmCrInt***

Demonstrate and explain the procedure of standing up from a suitable chair without the use of their arms.

***MmCRSc***

This question asks the respondent if they would feel safe performing a rise from a chair without using their hands. If the participant cannot rise *without* using their arms, ask them to try to stand up *using* their arms.

***MmCRRe***

Record whether the respondent could stand up from a chair with or without using their arms. If they cannot perform this exercise, record the reason at the next question.

***MMRRInt - MMRRSc***

If the respondent was able to perform a single chair rise without using their arms, explain the protocol for the appropriate number of repeated chair rises to the respondent and demonstrate. Ask the respondent if they would feel safe repeating this action 5 times if the respondent is aged 70 or over or 10 times if the respondent is aged 69 or under.

***MMRRStt – MMRRTTi***

Record the total amount of chair rises completed and record the time taken to complete the chair rises. If the respondent is aged 69 or under then record the time taken to reach 5 chair rises *as well as* the time taken to complete 10 chair rises.

#### **MMRRNa**

If the respondent is 70 or over and cannot complete 5 chair rises or the respondent is 69 or under and cannot perform 10 chair rises, record the reason.

### **8.14 Hair Sample**

Ask the respondent whether they are willing to have a sample of hair collected for cortisol measurement. If they are, complete the consent booklet as indicated by the CAPI.

Follow the procedure outlined in Section 12J, in order to collect and dispatch the hair sample.

### **8.15 Venepuncture checklist**

Complete the venepuncture questions.

### **8.16 Finishing the interview**

Ensure that you have all the correct codes ringed on the front of the Consent Booklet. If any results are to go to the GP (consent code 01, 15, or 13 ringed) check that you have their correct details. This is vital in case we need to telephone or write to the GP with any abnormal results. The GP address should be as full as possible, and the telephone number should include the local area code.

Thank the respondents for all their help. We will be writing to thank them as well.

Once you have finished entering information onto the computer, you should press <Ctrl+Enter> then <Alt+Q> (for Quit form (after admin)).

### **8.17 The admin block**

For each household in which you do any work, you must complete an ‘admin block’, which contains various pieces of information which must be kept separate from the individual schedules for reasons of confidentiality. Most of the items in the admin block are self-explanatory, but please note the following:

At *NChoice*, you cannot select code ‘5’ until you have completed all the individual schedules and you are ready to transmit data for the full household back to the office. Before that point, you cannot go beyond this question.

The outcome code for each respondent at *NurOutc* will nearly always be filled in for you, so in most cases you will just need to check that it is correct and press <Enter>, and fill it in on the NRF.

If you did not complete any nurse schedules for a household, at *NOutC* you will be asked to enter a household outcome code (931, 941, or 951). If you completed at

least one nurse schedule for a household the household outcome code will be 921. You do not need to enter this code in CAPI but it will appear on the Address Menu at OutC for completed addresses.

***Individual Outcome Codes:***

Each person eligible for a nurse interview must be assigned an individual outcome code.

Use code 79 if the respondent is a Partner and you went through the whole schedule with them and completed all the relevant questions. This code applies **even** if the respondent refused any of the measurements.

Use code 81 if the respondent is a Core Member and you went through the whole schedule with them and completed all the relevant questions. This code applies **even** if the respondent refused any of the measurements.

If someone breaks an appointment and you never manage to make contact with them again use code 85, not code 82.

A proxy refusal (84) is the situation where someone refuses on behalf of someone else - for example, a husband who says he will not allow his wife to be seen by a nurse. Obviously you should do your best to try and see the person yourself but sometimes this is not possible.

Codes 86-88 should be used only if the respondent is unavailable for interview for these reasons throughout the whole of your fieldwork period. If they are likely to return, and be fit to be seen during that time, then try again later.

**Household outcome codes:**

- Code 921 represents at least one productive interview.
- Code 941 should be used if you attempted to conduct the nurse visit, but this resulted in an unproductive outcome.
- Code 951 should be used if eligible respondents were identified, but you were not able to cover the address.

The respondent's name and GP details should be copied from the front page of the consent booklet, which is why you are instructed to keep all the consent booklets from a household until work at that household is complete. If you have inadvertently sent back a consent booklet before completing the admin block, you should leave the GP details blank (by pressing <Enter>) and code '2' at *YGPBlank*. This will indicate to the staff at the office that we need to pull out that consent booklet to get the GP details. It is important that you do not enter 'don't know' at the GP details questions, unless you really do not know the details. If you have collected the details (or think you may have done so), but do not have access to them, always enter a blank.

The computer will not consider the household as complete until the admin block is fully completed. You will not need to complete the admin for households where there is no work for you to do; all you do for these cases is enter code 3 at ScrOut.

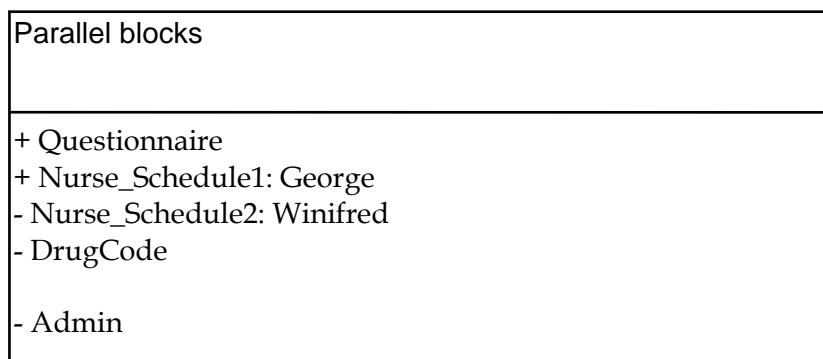
## 8.18 Parallel blocks

The computerised nurse schedule consists of three main components:

1. The household information
2. The individual schedule(s)
3. Drug code
4. The admin block

Each component is known as a ‘parallel block’. This means that you can enter any component at any time, no matter where you are in the schedule.

The way to move between parallel blocks is by pressing <Ctrl+Enter>, which brings up a window called ‘Parallel Blocks’. This screen is the ‘gateway’ to the other components of the schedule. It lists all the possible blocks you could go into, and looks like this:



The list of blocks will vary depending on the number of people in the household. There will always be an ‘Admin’ block for each household. In addition, there will be a ‘Nurse\_Schedule’ for each eligible individual in the household and any partners (in the above example, there are two eligible individuals).

It is important to remember that ‘Nurse\_Schedule[1]’ is the individual schedule for the *first person entered in the household grid*. This is why you must enter the details in person number order. If you entered, say, person number 4 at the top of the grid, then that person would be allocated ‘Nurse\_Schedule[1]’, even though (s)he is not person number 1. In larger households, this could get very confusing!

There is also a parallel block for any partners. Partners are ELSA sample members but they are not eligible for the nurse visit. YOU DO NOT INTERVIEW partners unless they have requested a nurse visit. If a partner does not request a nurse visit you do not need to enter this parallel block.

If the individuals are entered in the wrong order (e.g. if a household member is added to the grid late) and you subsequently find yourself unsure as to which

'Nurse\_Schedule' corresponds to which person number, you should enter each 'Nurse\_Schedule' in turn and look at the details given on the first screen until you find the person you want.

The final thing to note about the parallel blocks screen is the '+' or '-' which precedes each block. All blocks will have a '-' to start with, and this will turn into a '+' when the computer is satisfied that that block has been fully completed. In the above example, the nurse has completed the household grid and the schedule for George, but has not yet done the schedule for Winifred.

## 9 RETURNING WORK

Transmit back to the office at regular intervals throughout the fieldwork period. Keep all the work to be returned together for that household and transfer as soon as the household is complete. Referral back to GPs and respondents, in the event of any serious abnormalities, can be seriously delayed if work is not returned on time.

Before returning work, check that you have all the documents you should have and that they are properly serial numbered and so on. You should return a consent booklet for each person with an individual outcome code of 79 or 81.

Transmit the CAPI case back to the office when you have completed everything you have to do at a household.

- Pin together the Consent Booklets and any grip strength measurement cards and return them in one envelope.
- Send any interview documents given to you by the respondent (e.g. self completion) separately.
- **Do not entrust other people to post your envelopes – always post them yourself.**

CAPI questionnaire data will be transferred back to the office via the modem. The computer will decide what to transmit - you do not need to tell it which addresses to take and which to leave. Remember you still need to return the paper documents.

## **10 CONTACTS**

### **10.1 The Project Team**

Your nurse supervisor is the person you should consult if you have any queries about your equipment, how to use it in the field or any other problems you might have relating to carrying out the interview and measurements.

If you have any other queries relating to this project then you should contact:

- Andrew Phelps (020 7549 7131), Ian Simpson (020 7549 7036) or Natasha Wood (020 7549 7018) in Research
- Sue Roche (01277 690061) or Megan Hodges (01277 690135) in the Nurse Unit
- Pauline Burge (01277 690070) in Operations

In an emergency where the program is failing, you can contact one of the programmers who are Steve Edwards (020 7549 7089) and Colin Setchfield (020 7549 7116). In an emergency, if you are having problems with the Nurse Link, contact Sven Sjodin (020 7549 7093).

### **10.2 The Survey Doctor**

The main ‘Survey Doctor’ for ELSA is Dr Ian Forde of the Department of Epidemiology and Public Health at University College London. Ian is responsible for providing nurses with medical support and for liaising with GPs with respect to measurement or blood sample abnormalities which are detected as a result of this survey.

#### **Queries for the Survey Doctor**

If you have an urgent query please telephone **033 0001 1248**. Ian is not currently based in the UK but this is a London landline (purchased through Skype) so you can call him any time at local rates. If Ian does not answer, please leave a message. He will be checking messages daily, at around 1pm and 9pm (UK time).

If you need to leave a message with Ian Forde, leave the following details:

- Your name
- Contact telephone number
- If you want him to ring you back at a specific time etc.

#### **If the Survey Doctor is not available**

If Ian does not answer when you telephone, make sure you leave a message and contact number – in most situations, it will be okay to wait for him to ring you back. Otherwise, you can speak to your Nurse Supervisor who will follow up/help deal with the problem as necessary.

## 11 PROTOCOLS OF MEASURES IN ELSA NURSE VISIT

Most of the protocols for the measures in the ELSA nurse visit are the same as those in the Standard NatCen Nurse Protocols and we have therefore not repeated them here. Please make sure that you are familiar with the Standard Nurse Protocols for all the measures included in the ELSA nurse visit.

In this document, we have only included protocols for the three measures which have instructions specific to ELSA and are not covered in the Standard Nurse Protocols.

- A. Recording ambient air temperature - As in standard NatCen Nurse Protocols
- B. Blood Pressure - As in standard NatCen Nurse Protocols
- C. Grip Strength - As in standard NatCen Nurse Protocols
- D. Blood samples**
- E. Standing Height - As in standard NatCen Nurse Protocols
- F. Weight - As in standard NatCen Nurse Protocols
- G. Waist measurement - As in standard NatCen Nurse Protocols
- H. Lung Function - As in standard NatCen Nurse Protocols
- I. Physical performance measures  
(Balance, Leg raise and Chair rises)**
- J. Hair samples**

## D. BLOOD SAMPLE

### Eligibility

All core sample members, with the following exceptions, are eligible to give blood.

- **People with clotting or bleeding disorder**

By clotting or bleeding disorders we mean conditions such as haemophilia and low platelets, i.e. thrombocytopenia. There are many different types of bleeding/clotting disorders but they are all quite rare. With these problems, do not attempt to take blood, even if the disorder is controlled. (People who have a past history of thrombophlebitis, a deep venous thrombosis, a stroke caused by a clot, a myocardial infarction or an embolus are NOT considered to have clotting disorders and should not be excluded).

- **People who have had a fit in the last 5 years**

- **People who are not willing to give their consent in writing.**

- **People who are currently on anticoagulant drugs, eg Warfarin therapy.**

Some respondents might be taking anticoagulant drugs such as Warfarin, protamine or acenocoumarol which thin their blood so that they do not stop bleeding easily. If this is the case, then do not take a blood sample.. Please also note that:

- Clopidogrel and aspirin (and other such anti-platelet drugs, listed in BNF section 2.9 so drug code is 02.09.00) are NOT anti-coagulants (which are listed in BNF section 2.8, so drug codes 02.08.01 and 02.08.02).
- People would know if they are on anti-coagulants, as they need regular blood tests to check that their blood clots slower than average but not dangerously slowly.
- People on anti-platelet drugs do not need blood tests to check they are on the right dose.
- People on anti-platelet drugs, that stop the platelets being so 'sticky' - mostly (low dose) aspirin but also drugs like clopidogrel - can have blood taken as normal.

- **Pregnant women**

If you are uncertain whether a condition constitutes a contraindication to blood sampling, the Survey Doctor will be happy to answer your queries.

### Consent

As blood taking is an invasive procedure we need to obtain written consent as well as verbal consent to take it. This has to be obtained from the respondent **in all cases**. If you cannot obtain written consent, the computer routes accordingly. **On no account** should you ever take blood before you have obtained written consent to do so from the respondent.

There are further written consents we wish to obtain in respect of blood sampling - consent to send the results to the GP, consent to store blood for future analysis, and consent to extract and store DNA. You should seek to obtain all these consents before you take any blood. However, it is not essential that respondents consent to ALL parts for you to be able to take blood. For instance, they may consent to blood

collection for immediate laboratory analysis, but not to extraction of DNA. However, if the respondent does not consent to the extraction of their DNA then you should not take blood for the fifth and sixth tubes (see box below). Even if there is no consent given for specimen storage, we would still like to collect blood for immediate analysis, provided of course the respondent consents to blood collection.

The consent form explicitly mentions that HIV tests will not be performed, so that the participants are not placing themselves at risk of financial disadvantage (because some insurance companies may disqualify people, or demand higher premiums, if they have ever been **tested** for HIV, regardless of the result of the test), simply from taking part in the survey.

The questions on the schedules take you step by step through all the procedures for obtaining consents. Make sure you follow these carefully - recording consent codes as instructed and giving reasons for refusals, if applicable. In summary, what you do is:

- a. Ask the respondent if they would be willing to have a blood sample taken. Try to reassure respondents about the process, and be prepared to answer their concerns. You will need to explain to the respondent the need for written consent and how important it is.
- b. Obtain written consents in the appropriate **Blood Sample Consent section**.
- c. Obtain consent to store blood.
- d. Obtain consent to extract and store DNA.
- e. Obtain consent to send laboratory results to the respondent
- f. Obtain consent to send laboratory results to GP
- g. Check that you have ringed the correct consent codes on the front of the consent booklet.

Having checked that you have: all the appropriate initials; the respondent's signature in the appropriate section on page 5; and ringed the appropriate codes, you are ready to take the blood sample. If you obtain a sample, note down any problems at SamDifC. If you do not manage to get any blood, explain why not at NoBSM

## Purpose

A blood sample will be collected from respondents who give consent for this. The blood will be analysed for the following:

**Fibrinogen** – A protein necessary for blood clotting. High levels are also associated with a higher risk of heart disease.

**Total cholesterol** – Cholesterol is a type of fat present in the blood, related to diet. Too much cholesterol in the blood increases the risk of heart disease.

**HDL cholesterol** – This is 'good' cholesterol which is protective for heart disease.

**Triglycerides** - Together with total and HDL cholesterol, they provide a lipid profile which can give information on the risk of cardiovascular disease.

**Ferritin and Haemoglobin** – These are measures of iron levels in the body and are related to diet and other factors.

**C-reactive protein** – The level of this protein in the blood gives information on inflammatory activity in the body, and it is also associated with risk of heart disease.

**Fasting glucose and Glycated haemoglobin** – Both indicate the presence or risk of type 2 diabetes, which is associated with an increased risk of heart disease.

**White cell count (WCC) and mean corpuscular haemoglobin (MCH)** – When looked at in combination with Ferritin and haemoglobin can indicate anaemia.

**Vitamin D** – Obtained from the diet and from sunshine, we need Vitamin D for healthy bones. The only way we know if someone has enough Vitamin D for the body's needs is to measure it in the blood.

**Genetics** – Genetic factors are associated with some common diseases, such as diabetes and heart disease, and relate to general biological aspects of the ageing process.

The blood will **not** be tested for any viruses, such as HIV (AIDS).

## Equipment

Tourniquet	Vacutainer holder
Sterets	Vacutainer needles 21G (green with guard)
Gauze squares	Vacutainer needles 22G (black with guard)
Vinyl gloves	Butterfly needles 23G (Blue with guard)
Adhesive dressing (spot plaster)	Sharps / needle disposal box
Micropore tape	Vacutainer citrate blue tubes
Sheet of labels for blood sample tubes	Vacutainer plain red tubes
6 slot plastic dispatch packaging	Vacutainer fluoride grey tubes
Antiseptic hand gel	Vacutainer EDTA light purple tubes
	Vacutainer EDTA dark purple tubes

## The blood tubes

If the respondent has fasted and has given consent for DNA extraction then **SIX** tubes need to be filled. They should be filled in the following order so that, if a situation arises where there will be insufficient blood to fill all the tubes, the analyses with the highest priority can still be undertaken.

<i>First</i>	1.8ml citrate tube (blue)
<i>then</i>	6ml plain tube (red)
<i>then</i>	2ml fluoride tube (grey)
<i>then</i>	2ml EDTA tube (light purple)
<i>then</i>	4ml EDTA tube (dark purple)
<i>finally</i>	4ml EDTA tube (dark purple)

If the respondent consents to blood collection and DNA extraction but not other parts of the consent form, you should still draw ALL SIX vials of blood. If they do not consent to DNA extraction then you should only draw the first FOUR vials. You can

then reassure the respondent that no tests will be done where consent has not been granted. If the respondent has not fasted, the grey tube will not be taken.

## Taking the sample

You will be taking a maximum of six tubes. Everyone who is eligible and willing to have their blood taken should give at least three tubes of blood (the blue, red and first light purple tubes). If the respondent has fasted they will also give blood for the grey tube (you cannot return for a second visit to take a fasting blood sample). If the respondent has given consent for DNA extraction you should also draw blood for the second and third dark purple tubes. The CAPI programme will instruct you about which tubes you should draw blood for and the order in which you should fill them.

If the respondent agreed to fast or you could not contact them before the visit to tell them to fast then you will need to determine whether or not they have fasted adequately to give a fasting blood sample. You will be prompted to check with the respondent that they have not eaten or drunk anything (except water) in the last five hours. Respondents who have taken medication in the last five hours are eligible to give a fasting blood sample and you do not need to make a note.

If the respondent is eligible and willing to give the sample, complete the consent form obtaining the relevant signatures to take the blood sample and to send the results to the respondent's GP.

Remember to take the tubes in the correct order, as follows:

1. blue citrate tube
2. large plain red tube
3. grey fluoride tube (if the respondent has fasted)
4. light purple EDTA tube
5. & 6. TWO dark purple EDTA tubes (if the respondent gave consent for DNA extraction)

The vacutainers should be filled to capacity in turn and inverted gently 5 times on removal to ensure complete mixing of blood and preservative.

**Please also refer to the standard NatCen Nurse Protocols for Venepuncture**

## Labelling the Blood Tubes

- Label the tubes after you have completed the procedure.
- Use the set of serial number barcode labels to label the vacutainer tubes.
- You have one sheet of labels per respondent - check the serial number, person number, full name and date of birth printed in the top left of each one.
- Attach one serial number barcode label to every tube that you send to the lab.
- **Do not** write any information (such as date of birth) on the labels.

### Important

We cannot stress too much the importance of ensuring that you label each tube with the correct serial number for the person from whom the blood was obtained. Apart from the risk of matching up the blood analyses to the wrong person's data, we will

be sending the GP the wrong results. Imagine if we detect an abnormality and you have attached the wrong label to the tube!

### **On DESPATCH :**

The Consent Booklet contains two separate Despatch Notes that should be filled in for each blood sample (one for the RVI lab in Newcastle, and the office copy for Brentwood).

#### ***Completing the Newcastle Blood Despatch Note***

- Affix the respondent's barcoded serial number label at question 1 - do so very carefully. This should both correspond to the serial number on the label on page 1 of the Consent Booklet and to those you have stuck on the tubes.
- Complete items 2, 3, 4 and 5. Check that the date of birth is correct and consistent with entry on the nurse schedule and the tube label.
- At item 6 enter your Nurse Number.
- At item 7 code if the respondent fasted for at least 5 hours before the blood sample was taken.
- At item 8 tick each of the tubes collected (i.e. blue, red, grey, light purple & 2 x dark purple).
- At item 9 ring a code to tell the laboratory whether or not permission has been obtained to store part of the blood. Your entry here should correspond to your entry at item 8 on the front page of the booklet.

#### ***Completing the Office (Brentwood) Blood Despatch Note***

At item 6, affix a serial number barcode label that corresponds to those used on the Newcastle Despatch Note, the tubes, and the front of the consent form.

- Tick the samples you are returning at item 1. This indicates what we should expect back from the laboratory. Note if any of the samples were incomplete.
- Code the respondent's sex at item 2.
- Write in their date of birth at item 3 (check this corresponds with the barcode labels, NRF etc.).
- Write in the date the blood is taken at item 4.
- Write in the date the blood is despatched at item 5. This tells us the date you sent the samples to the labs.
- Write in your nurse number at item 7.

If you have only achieved an incomplete blood sample (e.g. have only filled one tube), please state this clearly on both copies of the despatch note and give the reason.

#### ***Packaging the blood samples***

All tubes from one person should be packed together in one despatch container with the Newcastle Despatch Form.

- You will be given **6 slot plastic dispatch packets (as used on USoc)**
  1. Insert the blood sample tubes in the slots of one side of the dispatch packet.
  2. Fit the other half of the packet onto the first – clicking the corners to ensure it has fastened together
  3. Place the Newcastle Despatch Note in the striped posting polybag addressed to RVI in Newcastle; along with the sealed blood packet.
  4. Seal the striped polybag by removing the self seal strip. Post the sample in a post box with same day collection.

#### ***Despatching blood samples***

You will be sending all the bloods, properly labelled and safely packaged, to the Royal Victoria Infirmary Laboratory in Newcastle-upon-Tyne. Pack the tubes for each respondent separately from those of other members of the household.

- The samples should be posted within 24 hours of being taken.
- Try to avoid taking a sample if you think that you will be unable to post it within 24 hours.
- If you miss the Saturday post collection, the sample must be posted on the following Monday morning.
- If you are unable to post the samples immediately, they can be stored at room temperature.

**When you have posted the samples, fill in the time and date of posting on the Office Copy of the Despatch Notes and return this to Brentwood with the Consent Forms.**

## I. PHYSICAL PERFORMANCE MEASURES

These measures are taken in a similar way to the descriptions in the standard NatCen Nurse Protocols – these are **additional** instructions specific to ELSA.

### Content of balance measures

The balance measures (including leg raises) evaluate the respondents' ability to balance, using five components: side-by-side, semi-tandem and full tandem, and for those aged 69 and under, leg raise with eyes open and leg raise with eyes closed. The CAPI programme will work out the respondent's age for you so you do not need to worry about selecting the correct route. However, you should understand how the measures differ between age groups.

- All ages start with the side by side for 10 seconds.
- If they pass the side by side they should then do the semi-tandem stand for 10 seconds.
- Respondents who pass the semi-tandem stand should then do the full tandem stand. If the respondent is aged 69 and under they should attempt the full tandem stand for 30 seconds. If the respondent is 70 or over they should only do the full tandem stand for 10 seconds.
- People aged 69 and under who successfully pass the side by side stand should then attempt the one-leg stand with their eyes open for 30 seconds.
- If respondents successfully pass the one-leg stand with their eyes open they should attempt it again with their eyes shut, again for 30 seconds.

For the side by side, semi-tandem and full-tandem stands, respondents are **not** permitted to practice first. For the one-leg stand, respondents are allowed one practice.

### Equipment

The only equipment that you will need for the balance measures is a stopwatch.

#### For simple timing (i.e. without the split function):

- To get into the correct stopwatch mode – if you have the Quartz Model – repeatedly press the **MIDDLE** button labelled 'Mode' until 'SP' is shown at the bottom of the stopwatch display.
- If you have the TIM Model, press middle button until watch mode is replaced by 0:00:00
- To reset the stopwatch – press the **LEFT** button.
- To start the stopwatch – press the **RIGHT** button.
- To stop the stopwatch – press the **RIGHT** button.

#### For split timing (i.e. for timing 10 chair rises):

- To start the stopwatch – press the **RIGHT** button.
- To take the time at the 5<sup>th</sup> rise – press the **LEFT** button.

- To take the time at the 10<sup>th</sup> rise – press the **RIGHT** button.
- Then **write down the time on the display** (i.e. the time for the 5<sup>th</sup> rise).
- To find out the time at the 10<sup>th</sup> rise - press the **LEFT** button.
- To reset the stopwatch – press the **LEFT** button.

You should be given a Split-time Stopwatch Instruction Card in your briefing pack. You may want to take this with you on visits to remind you how to use the stopwatch.

### **Nurse script**

You have been provided with a script card for each measure so that you can read the instructions when you are away from the CAPI.

1) Side-by side stand

Balance and co-ordination are needed to carry out successfully every day locomotor function at reasonable speeds and to prevent falls. The exercise is used as a screen for the ability to do the semi- and full tandem stands.

### **Procedures**

Explain the purpose of the tests:

*"I would now like to carry on with some more physical performance measurements, this will involve asking you to move your body in different ways. I will first describe and show each movement to you, then I'd like you to try to do it. If you cannot do a particular movement, or if you feel it would be unsafe to try to do it, please tell me and we'll move on to the next one. Let me emphasize that I do not want you to try to do any exercise that you feel might be unsafe. Do you have any questions before we begin?"*

Check the respondent's status. Ask '*Do you have any problems from recent surgery, injury or other health conditions that might prevent you from standing up from a chair and balancing?*' If the answer is 'yes', discuss with them whether they should attempt each test given their physical problems after describing each test. Do not assume a respondent is too physically limited to attempt a test without discussing it with them. However, remember that the respondent's health is paramount.

First explain and then demonstrate the side by side stand to the respondent:

*Now I will show you the FIRST movement. I want you to try to stand with your feet together, side by side, for about 10 seconds. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. When I want you to start, I will say: 'ready, begin'. **DEMONSTRATE**. Do you feel that would be safe?*

If the respondent says 'no', do not attempt this movement.

If the respondent says it is safe say 'When I want you to start, I will say 'ready, begin''. Ask the respondent to stand up. Stand to the side of the respondent. Say:

'ready, begin.' Press the start button to **start the stopwatch as soon as the respondent gets into the position and is free of support**. If necessary provide gentle support to the respondent's arm to help them into the position. Say: 'ready, begin' and then let go of their arm.

**Stop the stopwatch and say 'stop' after 10 seconds or when the participant steps out of position or grabs your arm.**

If the participant is unable to hold the position for 10 seconds, record the time in seconds to two decimal place in the CAPI. If the respondent did not attempt the measure, record the reason.

If the participant is successful record this and the programme will direct you to the semi-tandem stand.

## 2) Semi tandem stand

Explain and demonstrate the semi-tandem stand to the respondent:

*'Now I will show you the NEXT movement. I want you to try to stand with the side of the heel of one foot touching the big toe of the other foot for about 10 seconds. You may put either foot in front whichever is more comfortable for you. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. When I want you to start, I will say: 'ready, begin'. DEMONSTRATE. Do you feel that would be safe?'*

If the respondent says 'no', do not attempt this movement.

If the respondent says it is safe say 'When I want you to start, I will say 'ready, begin'. Ask the respondent to stand up. Stand to the side of the respondent. Say: 'ready, begin.' Press the start button to **start the stopwatch as soon as the respondent gets into the position and is free of support**. If necessary provide gentle support to the respondent's arm to help them into the position. Say: 'ready, begin' and then let go of their arm.

**Stop the stopwatch and say stop after 10 seconds or when the participant steps out of position or grabs your arm.**

If the participant is unable to hold the position for 10 seconds, record the time in seconds to two decimal place in the CAPI. The programme will direct you to the chair raise. If the respondent did not attempt the measure, record the reason.

If the participant is successful record this and the programme will direct you to the full tandem stand.

## 3) Full Tandem stand - If the respondent is aged 50-69

Explain and then demonstrate the full tandem stand to the respondent using the following script:

*'Now I will show you the NEXT movement. I want you to try to stand with the heel of one foot in front of and touching the toes of the other foot for about 30 seconds.'*

*You may put either foot in front whichever is more comfortable for you. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. **DEMONSTRATE.** Do you feel that would be safe?*

If the respondent says 'no', do not attempt this movement.

If the respondent says it is safe say 'When I want you to start, I will say 'ready, begin'. Ask the respondent to stand up. Stand to the side of the respondent. Say: 'ready, begin.' Press the start button to **start the stopwatch as soon as the respondent gets into the position and is free of support**. If necessary provide gentle support to the respondent's arm to help them into the position. Say: 'ready, begin' and then let go of their arm.

**Stop the stopwatch and say *stop* after 30 seconds or when the participant steps out of position or grabs your arm.**

Record the outcome in the CAPI. If the respondent is successful the CAPI will direct you to the leg raises.

If the participant is unable to hold the position for 30 seconds, record the time in seconds to two decimal place in the CAPI. If the respondent did not attempt the measure, record the reason.

#### 4) Full Tandem stand - If the respondent is aged 70+

Explain and then demonstrate the full tandem stand to the respondent using the following script:

*Now I will show you the **NEXT** movement. I want you to try to stand with the heel of one foot in front of and touching the toes of the other foot for about 10 seconds. You may put either foot in front whichever is more comfortable for you. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. **DEMONSTRATE.** Do you feel that would be safe?*

If the respondent says 'no', do not attempt this movement.

If the respondent says it is safe then allow them to practise the position once. Then say 'When I want you to start, I will say 'ready, begin'. Ask the respondent to stand up. Stand to the side of the respondent. Say: 'ready, begin.' Press the start button to **start the stopwatch as soon as the respondent gets into the position and is free of support**. If necessary provide gentle support to the respondent's arm to help them into the position. Say: 'ready, begin' and then let go of their arm.

**Stop the stopwatch and say *stop* after 10 seconds or when the participant steps out of position or grabs your arm.**

Record the outcome in the CAPI. If the respondent is successful the CAPI will direct you to the leg raise. If the participant is unable to hold the position for 10 seconds, record the time in seconds to two decimal places in the CAPI. If the respondent did not attempt the measure, record the reason.

### 5) Leg raise with eyes open

This measure should only be carried out if the respondent is aged between 50 and 69 and if they passed the side by side stand.

The leg raises should be performed adjacent to a stable surface, e.g. a table or wall and the nurse should be positioned to the other side of the participant.

The respondent can put their raised leg in front, to the back or to the side but they should not hook it round or rest it on their other leg.

First explain and then demonstrate the move to the respondent:

*Now I will show you the NEXT movement. I want you to try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can – I will stop you at 30 seconds. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. **DEMONSTRATE.** Do you feel that it would be safe to do this?*

If the respondent says ‘no’, do not attempt this movement.

If the respondent says it is safe, then allow them to practise the position once (if after this practice you or the respondent feel that it would be unsafe to proceed, the measure should be discontinued). Then say ‘When I want you to start, I will say ‘ready, begin’. Ask the respondent to stand up. Stand to the side of the respondent. Say: ‘ready, begin.’ Press the start button to **start the stopwatch as soon as the respondent raises one foot off the ground and is free of support.** If necessary provide gentle support to the respondent’s arm to help them into position. Say: ‘ready, begin’ and then let go of their arm.

**Stop the stopwatch and say ‘stop’ either a) when the raised leg touches the floor as the respondent loses their balance or b) after 30 seconds, whichever happens first.**

Record the outcome in the CAPI. If the participant is unable to hold the position for 30 seconds, record the time they held the position for. If the participant is successful record this and the CAPI will direct you to the leg raise with eyes shut.

For the leg raise measure, you should allow the respondent to have up to two ‘false starts’, ie they lose their balance and put their leg down almost **immediately** after you start timing. If they lose balance after this stage then you should not consider it as a false start and you should record the time they held the position for.

### 6) Leg raise with eyes shut

This measure should only be carried out if the respondent passed the leg raise with their eyes open.

First explain and then demonstrate the position to the respondent:

*Now I would like you to repeat the procedure one more time, this time with your eyes closed. I want you to close your eyes, and try to stand on one leg, whichever one you want, and raise the other leg off the ground a few inches. Stand for as long as you can - I will stop you at 30 seconds. You may use your arms, bend your knees or move your body to maintain your balance, but try not to move your feet. Try to hold this position until I tell you to stop. **DEMONSTRATE.** Do you feel that it would be safe to do this?*

If the respondent says 'no', do not attempt this movement.

If the respondent says it is safe then allow them to practise the position once (if after this practice you or the respondent feel that it would be unsafe to proceed, the measure should be discontinued). Then say 'When I want you to start, I will say 'ready, begin'. Ask the respondent to stand up. Stand to the side of the respondent. Say: 'ready, begin.' Press the start button to **start the stopwatch as soon as the respondent raises one foot off the ground, has their eyes closed and is free of support**. If necessary provide gentle support to the respondent's arm to help them into position. Say: 'ready, begin' and then let go of their arm.

**Stop the stopwatch and say 'stop' either a) when the raised leg touches the floor as the respondent loses their balance, or b) if they open their eyes, or c) after 30 seconds, whichever happens first.**

If the participant is unable to hold the position for 30 seconds, record the time they held the position for.

If the participant is successful record this.

## 7) Chair rise measure

### **Content**

The chair rise provides a measure of lower body strength, and has two components: a single rise without the use of arms, and repeated rises from a firm chair. The repeated chair rise test differs depending on the respondent's age, as follows:

- Age 69 and under – 10 chair rises
- Age 70 and over – 5 chair rises

### **Equipment**

1. Stopwatch (see instructions above)
2. Chair

This should be an armless, straight-backed chair. Kitchen or dining chairs may be suitable in many homes. If an ideal chair is not available, the following criteria for chair selection should be used in the order given:

- a) Armless, rather than with arms.
- b) Firmness: the firmer the better.
- c) Do not use beds, cots, folding chairs, garden chairs, chairs with wheels or chairs that swivel.

- a) Single Chair Rise

This exercise is used to screen for the ability to do repeated chair stands. Please note the chair rise should not be conducted on anyone who is not able to stand up without assistance. Walking aids (such as walker or cane) are not permitted in this test.

First check for availability of a suitable chair.

Explain and then demonstrate the move to the respondent:

*The next test measures the strength in your legs. I want you to try to stand up from a firm straight-backed chair, like a dining chair. First, fold your arms across your chest and sit so that your feet are on the floor; then stand up keeping your arms folded across your chest. **DEMONSTRATE**. Do you feel it would be safe to do this?*

If the participant cannot rise without using arms, say '*Okay, try to stand up using your arms*'.

Place the back of the chair against a wall to steady it. You should stand next to the respondent to provide assistance if they lose their balance. The respondent's feet should remain on the floor if possible.

Record the outcome of the single chair stand.

If the respondent refuses to try the single chair stand or is unable to stand on their own without using their arms to push off, then do not attempt to administer the repeated chair rises.

#### b) Repeated Chair Rises

This is a further test of lower body strength, balance, and endurance. It involves measuring the time required to stand up from a chair and sit down in a chair five or ten times without using their arms.

Use the same chair in the same place as in the single chair rise.

***If the respondent is aged 50 to 69:***

If the respondent completed the single chair rise without using their arms, they are eligible to attempt the repeated chair rises.

Explain and then demonstrate the move to the respondent:

*Now I would like you to repeat the procedure but this time I want you to stand up straight as quickly as you can 10 times, without stopping in between and without using your arms to push off. After standing up each time, sit down and then stand up again. Keep your arms folded across your chest. I'll be timing you with a stopwatch. **DEMONSTRATE**. Do you feel it would be safe to do that?*

There is no need to demonstrate the full ten rises. Rise twice, counting out loud 'one, two', sit back down and say 'all the way through to...' and rise two more times counting out loud 'nine, ten'.

Ask the respondent to resume the sitting position they were in just before standing up, with their feet resting on the floor and their arms folded across the chest. When the participant is properly seated, say ‘ready, begin’. **Start the stopwatch WHEN YOU SAY THIS.** Count out loud as s/he rises each time, up to ten times. A rise is complete when the respondent is fully standing with their back straight. When the respondent completes the fifth rise, press the split timer on the stopwatch. Continue counting out loud. When the respondent has straightened up completely for the tenth time, stop the stopwatch. The respondent’s feet should remain on the floor if possible during the rises.

Stop if the participant becomes too tired or short of breath during the repeated chair stands. Also stop:

- If the participant uses their arms,
- If after 1 minute the participant has not completed all the rises,
- At your discretion, if you are concerned for the participant’s safety.

If the participant stops and appears to be fatigued before completing the rises, ask *Can you continue?* If the participant says “Yes,” continue timing until 60 seconds has elapsed. If they say ‘no’, stop the stopwatch and record the number of completed stands they did without using their arms.

Be careful to enter the time from the first five stands first, before retrieving the time for the 10 stands from the stopwatch’s memory. See instructions above. Use the stopwatch instruction sheet if necessary.

***If the respondent is aged 70 or over:***

If the respondent completed the single chair stand without using their arms, they are eligible to attempt the repeated chair rises.

Explain and then demonstrate the move to the respondent:

*Now I would like you to repeat the procedure but this time I want you to stand up straight as quickly as you can 5 times, without stopping in between and without using your arms to push off. After standing up each time, sit down and then stand up again. Keep your arms folded across your chest. I’ll be timing you with a stopwatch. DEMONSTRATE. Do you feel it would be safe to do that?*

There is no need to demonstrate the full five rises. Rise twice, counting out loud ‘one, two’, sit back down and say ‘all the way through to five’.

Ask the respondent to resume the sitting position they were in just before standing up, with their feet resting on the floor and their arms folded across the chest. When the participant is properly seated, say ‘ready, begin’. **Start the stopwatch WHEN YOU SAY THIS.** Count out loud as the respondent rises each time, up to five times. A rise is complete when the respondent is fully standing with their back straight. When the respondent has straightened up completely for the fifth time, stop the stopwatch. The respondent’s feet should remain on the floor if possible during the rises.

Stop if the participant becomes too tired or short of breath during the repeated chair stands. Also stop:

- If the participant uses their arms,
- If after 1 minute the participant has not completed all the rises,

- At your discretion, if you are concerned for the participant's safety.

If the participant stops and appears to be fatigued before completing the five stands, ask *Can you continue?* If the participant says "Yes," continue timing until 60 seconds has elapsed. If they say 'no' stop the stopwatch and record the number of stands completed by the respondent without using their arms.

Record the outcome of the repeated chair rise in the CAPI.

## **J. ELSA Hair Sample Collection Procedure for Assessment of Cortisol**

### **Introduction**

Hair Sample analysis can be used to measure the stress hormone called Cortisol, which is stored in the hair. The amount of cortisol released over time can therefore be measured in a sample of hair taken from close to the scalp in the posterior vertex area of the scalp. This area of hair growth on the scalp shows the most consistent levels of Cortisol, compared to other areas of the scalp's hair growth.

Prior to gathering this sample, written informed consent must be obtained, as per the project instructions. The CAPI programme will also have asked you to note down any medications or treatments of any kind that might impact on Cortisol levels in the respondent.

### **Equipment**

For each respondent hair sample the following equipment is needed:

- 1 x Pair of well fitting disposable vinyl gloves
- 1 x Pair 5 inch safety scissors with 'ruler' blades
- 1 x Milton antibacterial hand gel
- 1 x Pack of Milton antibacterial wipes
- Disposable respondent sample pack containing the following (the plastic bag can be used as the rubbish bag for the contents to be discarded into the respondent's household waste):
  - 1 x 5 inch comb
  - 2 x hair sectioning grips
  - 2 x wire food bag ties
  - 1 x self seal envelope
- 1 x Pre-printed Respondent Sample label
- 1 x Sample dispatch note
- 1 x Hard backed A5 dispatch envelope

### **Exclusions**

ELSA Respondents are excluded from the hair sample in the following circumstances:

- Pregnancy (in 'younger partner' respondents)
- Breastfeeding (in 'younger partner' respondents)
- Current scalp condition rendering the hair sample soiled or at risk of transmission of an unknown / known blood borne virus (e.g. active bleeding or infection)
- Respondent is unable to sit with head remaining still (e.g. continual tremor, head shaking)
- Has less than 2cms of hair length in the posterior vertex scalp area (not including any hair extensions)

- Does not wish to give written consent

### Procedure

<p>1. Following explanation of the procedure (as per CAPI project instructions) and gaining of written consent, ensure the respondent is sitting in a suitable chair, where the Nurse can access the posterior vertex area of the respondent's head and have the equipment close to hand.</p>	
<p>2. Open a respondent hair sample pack and lay out the contents. The bag can be used as the rubbish / discard bag.</p>	
<p>3. Use the Milton hand gel cleanse your hands and put on a pair of well fitting vinyl disposable gloves.</p>	
<p>4. Ask the respondent to tip their chin down towards their chest so that the posterior vertex of the head rotates upwards. Inform the respondent of the area the sample will be taken from. The posterior vertex is the back part of the crown of the head as highlighted in the picture.</p>	
<p>5. Gently comb the respondent's hair over the posterior vertex area to align the hair strands together.</p>	
<p>6. Using the hair sectioning grips, gently secure the hair off on each side of the identified sample site, ensuring the hair strands left in the middle constitute the width of around 1.5mm – or quarter of the width of a standard pencil – when twisted (see point 7 overleaf).</p>	

<p>7. Comb the remaining hair again to align the strands for the sample and gently twist along its length to assess the thickness of the hair to be sampled.</p>			
<p>8. Firmly secure the hair sample with a wire tie approximately <math>\frac{1}{2}</math> cm (5mm) from the scalp and keep hold of the hair at the wire tie position.</p>			
<p>9. Cut the hair sample as close as possible to the scalp (between the scalp and wire tie). The scissors should be positioned with the blades pointing towards the floor, taking care not to nip the respondent's scalp.</p>			
<p>10. Once the hair sample has been cut tighten the wire tie to ensure the hair strands do not become free.</p>	<p>11. Place the hair sample into the sample envelope with the scalp (cut end) uppermost. Allow a long hair sample to coil naturally in the envelope. Bend the end of the wire tie over the envelope closure to provide a fixing point for the sample and seal the envelope over the tie</p>		
			
<p>12. Place a pre-prepared respondent sample label on the sample envelope, on the same side as the envelope closure.</p>			

<p>13. Using a Milton antibacterial wipe – cleanse the scissor blades and leave to dry before using again or packing away.</p>	
<p>14. Place all disposable items into rubbish bag, remove gloves, cleanse hands with Milton antibacterial hand gel and ask respondent to dispose of the rubbish bag in their normal household waste (the respondent may wish to keep the comb and hair sectioning grips).</p>	
<p>15. Complete the CAPI and dispatch note.</p>	
<p>16. Place labelled hair sample envelope into the hard backed A5 dispatch envelope with the dispatch note and post in a post box with same day delivery. <b>Note:</b> If there is no same day postal service then the sample should be kept at room temperature and posted in the next available service.</p>	

## **APPENDIX 1: SUMMARY OF NURSE-INTERVIEWER LIAISON**

- **The interviewer will contact you before he/she starts work (or you must contact her/him). You should:**
  - Discuss preferred method of making appointments
  - If appropriate, provide availability details – you can use the appointment preference form.
- **If respondent agrees to a nurse visit, the interviewer gives him/her an Appointment Record Card with either:**
  - a provisional appointment - for you to confirm
  - without appointment - for you to set up
- **The interviewer will point out preparation details on this card & tell the respondent the nurse will be contacting them to talk about this in more detail.**
- **Interviewer also leaves genetics leaflet (if in the wave 6 refreshment sample) and a nurse leaflet with the respondent.**
- **Interviewer calls to inform you of nurse visit, or if no nurse visit needed**
  - Check/collect telephone number you have for the respondent on the nurse summary sheet is correct
  - Ask for any additional relevant information (e.g. interviewer should inform you of deafness/sight issues, other health issues identified during interview)
- **Keep your Nurse Sample Sheet handy, for example by phone**
- **Interviewer transmits the household back which then sends the household to you via the nurse link.**
- **All the information you need is transferred from the main interview to you via the eNRF.**
- Please note that it would be preferable to arrange visits in the morning in order to collect a fasting blood sample (if applicable), if convenient for the respondent, and does not involve an extra long journey that you wouldn't otherwise incur

## **APPENDIX 2: CHECKLIST FOR WHEN YOU TELEPHONE THE RESPONDENT BEFORE YOUR VISIT**

- **After interviewer phones - contact respondent ASAP**
  - Refer to Appointment Record Card
  - Either confirm or arrange day and time of visit
  - Discuss preparations and suitable clothing
  - Discuss whether fasting is appropriate (see below)
  - Where relevant, clarify rules of fasting
- **Respondent should NOT fast if**
  - They are aged 80 years or over
  - Diabetic and on treatment (OK to fast if controlling by diet and NOT on treatment)
  - They have a clotting or bleeding disorder or on anti-coagulant drugs (e.g. warfarin, protamine or acenocoumarol)
  - Has had fit (epileptic, convulsion, convulsion associated with high fever) in last five years
  - You don't feel comfortable about it (e.g. respondent seems frail or confused, or your interviewer has expressed concern about their health)
- **If you ask the respondent to fast**
  - Refer to Appointment Record Card when talking to respondent
  - They must fast for 5 hours prior to visit
  - Tell them they **should** drink water
  - Refer to fasting guidelines on appointment record card – rules depend on time of appointment
  - Respondent should take medication as usual
  - If appointment is over a week away, suggest calling them again to check for any changes in health status
- **If it says on the eNRF / NRF pad that you are to collect the respondent's self-completion questionnaire – remind the respondent about this.**

## APPENDIX 3 – GP ADDRESS LOOK UP VIA: [WWW.NHS.UK](http://WWW.NHS.UK)

2. Go to [www.nhs.uk](http://www.nhs.uk)

1. Place respondent's post code into space

3. Press red 'Find GP Practices' button

4. The number of GP practices is shown – closest to postcode first

5. Scroll down the pages and see the Practices Listed – you can also click on the practice name to see the Doctors registered with that practice.

The screenshot shows the NHS Choices homepage. A large central search bar is visible, with the placeholder text "postcode, town or practice name". Below the search bar are several checkboxes: "Remember postcode", "Only show practices accepting patients", and a red "Find GP practices" button. To the left of the search bar, there's a sidebar with "Health A-Z" and "Conditions and treatments" sections, including links for Measles, Flu, Depression, Diabetes, and Norovirus. To the right, there are sections for "Health services near you", "Healthcare abroad and the EHIC card", and "Live Well". At the bottom of the page, there's a section titled "GP practices near EC1V 0AX" which lists 437 practices found within 5 miles of the specified postcode. The first entry is "Clerkenwell Medical Practice" located at Pine Street Finsbury Health Centre London EC1R 0LP, with a phone number of 020 7835 1515. It shows a user rating of 7 out of 10 and provides links for "Simple list", "Detailed comparison", and "Map". A sidebar on the right provides information about GP ratings.



## BLOOD PRESSURE TO GP CONSENT

Serial number

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

Ck

Person

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7. I consent to the National Centre for Social Research informing my General Practitioner (GP) of my blood pressure results.

I am aware that the results of my blood pressure measurement may be used by my GP to help monitor my health and that my GP may wish to include the results in any future report about me.

Please write your  
initials on the line  
below if consent  
given

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## BLOOD SAMPLE CONSENT

Serial number

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Ck

Person

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7. I consent to a qualified nurse/midwife taking a sample of my blood on behalf of the National Centre for Social Research.

I understand that the sample will be analysed for total cholesterol, HDL cholesterol, fibrinogen, C-reactive protein, ferritin, glycated haemoglobin and haemoglobin, white cell count, Vitamin D, insulin-like growth factor 1 (IGF-1), and other hormones. This blood sample will not be used to test for the HIV virus. The purpose and procedure have been explained to me by the nurse/midwife and I have had an opportunity to discuss this with him/her. I have received a written explanation of these matters.

Please write your  
initials on the line  
below if consent  
given

\_\_\_\_\_

2. I consent to the National Centre for Social Research informing my General Practitioner (GP) of the blood sample analysis results. I am aware that the results of my blood sample analysis may be used by my GP to help him/her monitor my health and that my GP may wish to include the results in any future report about me.

Please write your  
initials on the line  
below if consent  
given

\_\_\_\_\_

3. I consent for samples of my blood to be stored and used in the future for medical research studies of common diseases and the ageing process. I understand that all blood test results and related information will be coded so I cannot be identified. Access to my name and address will be restricted to the research team at the National Centre for Social Research through the use of a unique identification number. For purposes of scientific analyses, links to my name will be held separately and securely from any data collected. Only research approved by the study team and an independent NHS Research Ethics Committee will be allowed, now and in the future and the sample will not be tested for HIV.

Please write your  
initials on the line  
below if consent  
given

\_\_\_\_\_

I understand that I may withdraw this consent (as described in the information leaflet) at any time by contacting the investigators in writing, without giving any reasons and at no penalty.

# **GENETICS CONSENT**

**(FOR REFRESHMENT SAMPLE ONLY)**

Serial number

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Ck

Person

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1. I have read the information leaflet on the genetics studies or had it explained to me. I understand the arrangements and safeguards described for these studies.

I give my consent for a sample of my blood to be taken, stored and used in the genetic studies. I understand that the studies will cover:

- the causes, diagnosis or treatment of common diseases
- factors linked to the ageing process and the development of disabilities
- the social and economic influences on the development of the above conditions

Please write your initials on the line below if consent given

---

I understand that:

- the DNA samples and related information will be coded to ensure that my personal identity is not revealed to researchers carrying out scientific analysis
- links to my name will be held separately and securely, for administering the study and data collection
- only research approved by the study team will be allowed, now and in the future
- that no personal test results from my DNA will be given to me
- the data and samples will be owned by The Study and the universities. No samples or information will be sold.

I understand that I may withdraw consent (as described in the green information leaflet) at any time, by contacting the investigators in writing, without giving any reasons and at no penalty.

## LUNG FUNCTION TO GP CONSENT

Serial number

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Ck

Person

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1. I consent to the National Centre for Social Research informing my General Practitioner (GP) of my lung function results.

I am aware that the results of my lung function measurement may be used by my GP to help monitor my health and that my GP may wish to include the results in any future report about me.

Please write your initials on the line below if consent given  
\_\_\_\_\_

## HAIR SAMPLE CONSENT

Serial number

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

Ck

Person

--	--

1. I give my consent to use a sample of my hair for tests of cortisol and future medical research studies of the causes, diagnosis, treatment or outcome of disease. I understand that the hair sample and related information will be coded so I cannot be identified, and used for non-commercial research purposes only, and will not be tested for HIV. I understand that I may withdraw this consent at any time by contacting the investigators in writing, without giving any reasons.

Please write your initials on the line below if consent given  
\_\_\_\_\_

*Print name (respondent):* \_\_\_\_\_

*Signed (respondent):* \_\_\_\_\_

*Date:* \_\_\_\_\_

*Print name (nurse):* \_\_\_\_\_

*Signed (nurse):* \_\_\_\_\_

*Date:* \_\_\_\_\_

THE ENGLISH LONGITUDINAL STUDY OF AGEING

**DESPATCH NOTE FOR BLOOD SAMPLES**

(OFFICE COPY)

**Complete all sections and return in consent booklet to Brentwood.**

1. BLOOD SAMPLE TUBES DESPATCHED (TICK RELEVANT BOXES):

- 1.8ml Citrate: Blue   
6ml Plain: Red   
2ml Fluoride: Grey   
2ml EDTA: Purple - Light   
4ml EDTA: Purple - Dark   
4ml EDTA: Purple - Dark

2. SEX: Male  1  
Female  2
3. DATE OF BIRTH: Day   Month   Year
4. BLOOD TAKEN: Day   Month   Year
5. BLOOD SAMPLES DESPATCHED: Day   Month   Year
6. SERIAL NUMBER:  D ATTACH BARCODE LABEL
7. NURSE NUMBER:
8. POINT NUMBER:

THE ENGLISH LONGITUDINAL STUDY OF AGEING

**DESPATCH NOTE FOR BLOOD SAMPLES**  
 (LABORATORY COPY - NEWCASTLE)

Complete all sections CLEARLY and LEGIBLY and enclose with samples to laboratory.

1. SERIAL NUMBER:

**D**

ATTACH BARCODE LABEL

2. SEX: Male

1

Female

2

3. DATE OF BIRTH:

Day  Month  Year    

4. BLOOD COLLECTED:

Day  Month  Year    

5. TIME OF COLLECTION:

Hr  Min  

(Use 24 hour clock)

6. NURSE NUMBER:

7. HAD RESPONDENT FASTED?

Yes

1

No

2

9. STORAGE CONSENT: BLOOD

Given

1

Not given

2

8. BLOOD COLLECTED (tick if successful):

BLUE

RED

GREY

PURPLE – Light

PURPLE – Dark

**LABELLING ON SAMPLE TUBES AND THIS FORM MUST CORRESPOND**

CHECK ALL DETAILS ABOVE ARE CORRECT BEFORE POSTING

**FOR LAB USE ONLY**

TUBES ENCLOSED:		✓ if rec'd	ACTION REQUIRED
Citrate 1.8ml	BLUE	<input type="checkbox"/>	Fibrinogen
Plain 6ml	RED	<input type="checkbox"/>	Full lipid Profile (Total Cholesterol, HDL, LDL, Triglycerides) Ferritin CRP IGF-1  Vitamin D
Fluoride 2ml	GREY	<input type="checkbox"/>	Fasting Glucose
EDTA 2ml x 1 4ml x 2	PURPLE (Light) (Dark)	<input type="checkbox"/>	1x Hb, HbA1c, WCC, MCH 2x Storage for subsequent DNA analysis

