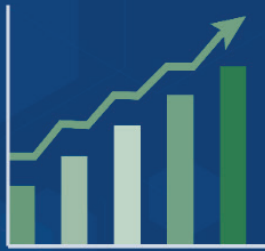


2024 | DATA YEAR RELEASE NOTES



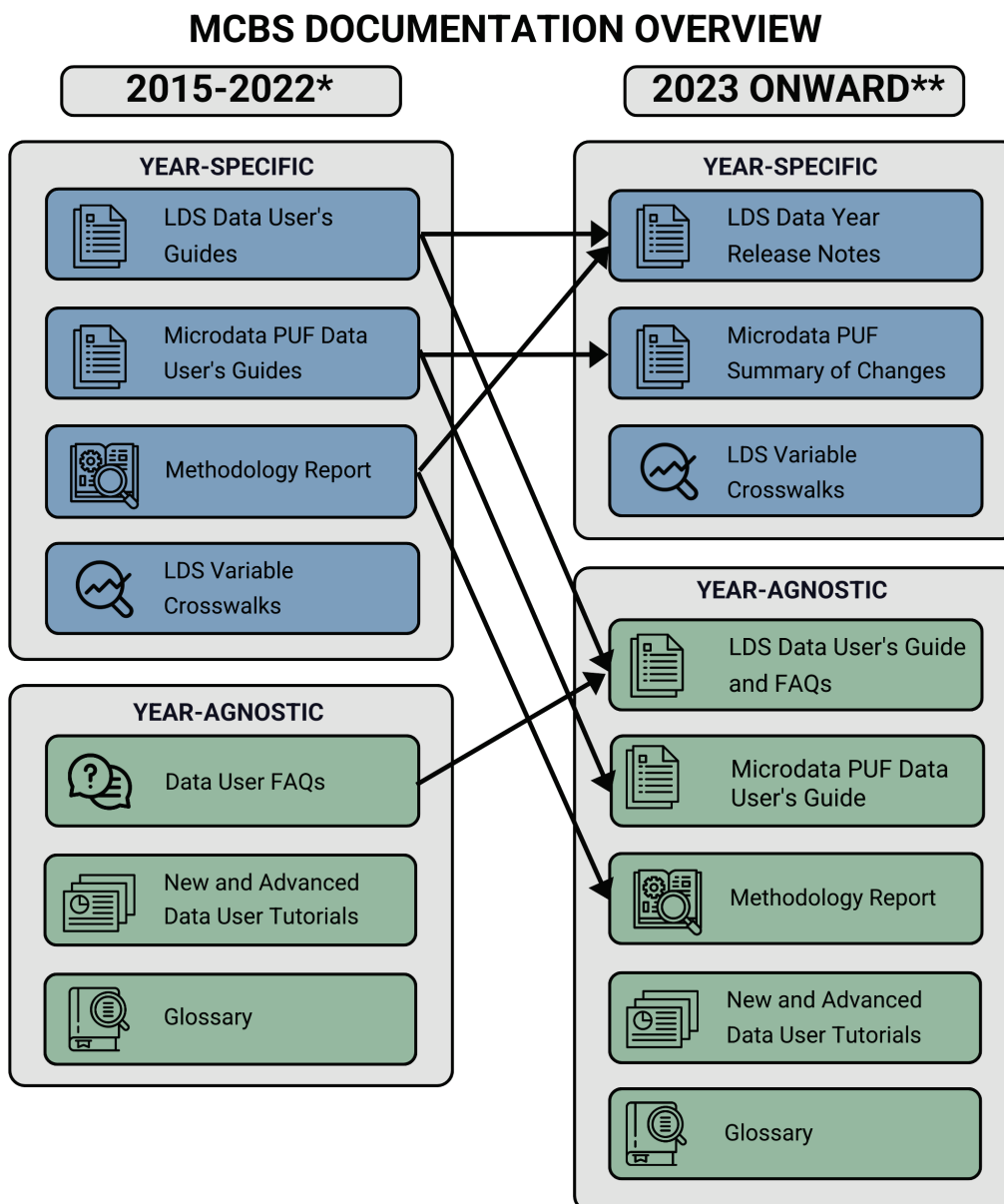
Centers for Medicare & Medicaid Services (CMS)
Office of Enterprise Data and Analytics (OEDA)

Version Control Log

Date	Version	Revisions
08/29/2025	1.0	Initial version published for 2024 Survey File - Early Release LDS.

MCBS DOCUMENTATION CROSSWALK AND OVERVIEW

The Centers for Medicare & Medicaid Services (CMS) releases a comprehensive suite of documentation products to support researchers in using the Medicare Current Beneficiary Survey (MCBS). These products were consolidated beginning with the 2023 data year to separate the detailed background information on the MCBS from focused year-specific content that is most relevant to researchers. This section provides a concise overview of MCBS documentation products beginning with the 2015 data year, all available for download on the CMS MCBS website: <https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-documentation-codebooks>.



NOTES: The year-specific products are updated annually for each data year. The year-agnostic products are reviewed annually, but only updated as needed.

* For new researchers using the 2015-2022 MCBS LDS, the *Survey File LDS Data User's Guide* and *New User Tutorial* are the recommended starting points. See the CMS MCBS website for information on the pre-2015 MCBS documentation.

** Beginning with the 2023 MCBS LDS, the *LDS Data Year Release Notes* and *New User Tutorial* are the recommended starting points for new researchers.

TABLE OF CONTENTS

MCBS DOCUMENTATION CROSSWALK AND OVERVIEW	ii
ACRONYM LIST	vi
1. INTRODUCTION.....	1
1.1 Contents of the Data Year Release Notes.....	2
1.2 Data Access.....	3
1.3 Guidelines for Citation of Data Source	3
1.4 Data User Resources	4
2. 2024 DATA YEAR CONTENT	5
2.1 Questionnaires.....	5
2.1.1 Core Community Questionnaire Sections.....	5
2.1.2 Topical Community Questionnaire Sections	6
2.1.3 Community Questionnaire Section Rotation within a Data Year.....	6
2.1.4 Facility Core Questionnaire Sections	7
2.1.5 Facility Topical Questionnaire Sections.....	8
2.2 Sampling	8
2.2.1 Targeted Population and Sampling Strata	8
2.2.2 Sample Selection	9
2.2.3 Completed Interviews	9
2.3 Interviewer Recruitment, Staffing, and Training	9
2.4 Data Collection Schedule and Results	10
2.5 Clearance	11
2.6 Initial Interview Variables	11
2.7 MCBS Rounds by Data Year and Season	12
ER1. SURVEY FILE - EARLY RELEASE LDS	14
ER2. WHAT'S NEW FOR DATA YEAR 2024?	15
ER2.1 Questionnaires.....	15
Community Questionnaire.....	15
Facility Instrument	16

ER2.2 Data Processing and LDS Content 17

ER3. DATA FILE CONTENTS19

ER3.1 2024 MCBS Survey File - Early Release Segments..... 19

ER3.2 Imputation 22

ER3.3 Weights..... 22

ER3.3.1 Special Topical Segment Weights 22

ER3.4 Special Notes..... 23

LIST OF EXHIBITS

Exhibit 1.1:	Overview of 2024 MCBS Limited Data Sets	1
Exhibit 1.4.1:	Table of Links to MCBS Documentation and Resources	4
Exhibit 2.1.1:	2024 Data Year MCBS Community Core Sections by Data File and Data Collection Schedule	5
Exhibit 2.1.2:	2024 Data Year MCBS Community Topical Sections by Data File and Data Collection Schedule	6
Exhibit 2.1.3:	2024 Data Collection Year MCBS Community Questionnaire Section Rotation	7
Exhibit 2.1.4:	2024 Data Year MCBS Facility Core Sections by Data File and Data Collection Schedule	7
Exhibit 2.1.5:	2024 Data Year MCBS Facility Topical Sections by Data File and Data Collection Schedule	8
Exhibit 2.2.1:	2024 Panel of Selected Beneficiaries by Hispanic and Non-Hispanic Ethnicity Classification and Age Category	8
Exhibit 2.2.2:	2024 MCBS Sample Selection for the LDS Releases	9
Exhibit 2.2.3:	2024 MCBS Fall Round Completed Interviews: Continuing and Incoming Panels	9
Exhibit 2.4.1:	2024 MCBS Data Collection Schedule	10
Exhibit 2.4.2:	2024 Completed Interviews by Component	11
Exhibit 2.4.3:	2024 Completed Interviews by Interview Mode	11
Exhibit 2.6.1:	Initial Interview Variables in the 2024 LDS	11
Exhibit 2.7.1:	MCBS Rounds by Data Year and Season through Fall 2025	12
Exhibit ER2.2.1:	2024 MCBS Survey File - Early Release LDS Content Additions	17
Exhibit ER2.2.2:	2024 MCBS Survey File - Early Release LDS Content Changes	18
Exhibit ER2.2.3:	2024 MCBS Survey File - Early Release LDS Content Removals	18
Exhibit ER3.1.1:	2024 MCBS Survey File - Early Release Segments and Contents	19
Exhibit ER3.3.1:	2024 MCBS Survey File - Early Release Summary of Weights	23

ACRONYM LIST

ACQ	Access to Care Questionnaire
ADLs	Activities of Daily Living
AR	Administrative Records
BQ	Background Questionnaire
CCW	CMS Chronic Conditions Warehouse
CMQ	Cognitive Measures Questionnaire
CMS	Centers for Medicare & Medicaid Services
CPQ	Chronic Pain Questionnaire
CPS	Charge Payment Summary Questionnaire
CQ	Community Questionnaire
CS	Cost Supplement File
CV	COVID-19 Beneficiary Questionnaire
CVQ	COVID-19 Questionnaire
DBQ	Debt Questionnaire
DIQ	Demographics and Income Questionnaire
DUA	Data Use Agreement
DVH	Dental, Vision, and Hearing Utilization Questionnaire
ENS	Enumeration Summary Questionnaire
EPPE	Enterprise Privacy Policy Engine
ER	Survey File - Early Release
ERQ	Emergency Room Utilization Questionnaire
ER_ACCESSCR	Survey File - Early Release Access to Care segment
ER_ASSIST	Survey File - Early Release Assistance segment
ER_CHRNCOND	Survey File - Early Release Chronic Conditions segment
ER_COGNFUNC	Survey File - Early Release Cognitive Measures segment
ER_DEMO	Survey File - Early Release Demographics segment
ER_DIABETES	Survey File - Early Release Diabetes segment
ER_EVRWGTS	Survey File - Early Release ever enrolled population weights
ER_FALLS	Survey File - Early Release Falls segment
ER_GENHLTH	Survey File - Early Release General Health segment
ER_HHCHAR	Survey File - Early Release Household Characteristics segment
ER_HISUMRY	Survey File - Early Release Health Insurance Summary segment
ER_MENTHLTH	Survey File - Early Release Mental Health segment
ER_MOBILITY	Survey File - Early Release Mobility segment
ER_NAGIDIS	Survey File - Early Release Nagi Disability segment
ER_NICOALCO	Survey File - Early Release Nicotine and Alcohol segment
ER_NPWGTS	Survey File - Early Release non-proxy adjustment weights
ER_ORALHLTH	Survey File - Early Release Oral Health segment
ER_PNTACT	Survey File - Early Release Patient Activation segment
ER_PREVCARE	Survey File - Early Release Preventive Care segment
ER_SATWCARE	Survey File - Early Release Satisfaction with Care segment
ER_VISHEAR	Survey File - Early Release Vision and Hearing segment
EX	Expenditures Questionnaire
FACCHAR	Facility Characteristics segment
FFS	Fee-for-Service
FI	Facility Instrument
FQ	Facility Questionnaire
HAQ	Housing Characteristics Questionnaire

HFQ	Health Status and Functioning Questionnaire
HHQ	Home Health Utilization Questionnaire
HIQ	Health Insurance Questionnaire
HISUMRY	Health Insurance Summary
HS	Health Status Questionnaire
IADLs	Instrumental Activities of Daily Living
IAQ	Income and Assets Questionnaire
ID	Identification
IMQ	Immunization Questionnaire
INQ	Introduction Questionnaire
IPQ	Inpatient Hospital Utilization Questionnaire
IRB	Institutional Review Board
IRQ	Interviewer Remarks Questionnaire
IUQ	Institutional Utilization Questionnaire
KNQ	Beneficiary Knowledge and Information Needs Questionnaire
LDS	Limited Data Set(s)
MA	Medicare Advantage
MBQ	Mobility of Beneficiaries Questionnaire
MCBS	Medicare Current Beneficiary Survey
MPQ	Medical Provider Utilization Questionnaire
NAQ	Nicotine and Alcohol Use Questionnaire
NHIS	National Health Interview Survey
NORC	NORC at the University of Chicago
NSQ	No Statement Charge Questionnaire
OEDA	Office of Enterprise Data and Analytics
OHIP-5	5-item Oral Health Impact Profile scale
OMB	Office of Management and Budget
OMQ	Other Medical Expenses Utilization Questionnaire
OPQ	Outpatient Utilization Questionnaire
PAQ	Patient Activation Questionnaire
PDF	Portable Document Format
PDP	Prescription Drug Plan
PMQ	Prescribed Medicine Questionnaire
PSQ	Post-Statement Charge Questionnaire
PUF	Public Use File
PVQ	Preventive Care Questionnaire
PXQ	Physical Measures Questionnaire
RH	Residence History Questionnaire
RIC	Record Identification Code
RXQ	Drug Coverage Questionnaire
SAS	Statistical Analysis System
SCF	Sample Control File
SCQ	Satisfaction with Care Questionnaire
SF	Survey File
STQ	Statement Cost Series Questionnaire
TLQ	Telemedicine Questionnaire
US	Use of Health Services Questionnaire
USQ	Usual Source of Care Questionnaire
VRDC	Virtual Research Data Center

1. INTRODUCTION

Medicare is the nation's health insurance program for persons 65 years and over and for persons younger than 65 years who have a qualifying disability. The Medicare Current Beneficiary Survey (MCBS) consists of a representative national sample of the Medicare population sponsored by the Centers for Medicare & Medicaid Services (CMS).¹ The MCBS is designed to aid CMS in administering, monitoring, and evaluating the Medicare program. A leading source of information on Medicare and its impact on beneficiaries, the MCBS provides important information on beneficiaries that is not otherwise collected through operational or administrative data on the Medicare program and plays an essential role in monitoring and evaluating beneficiary health status and health care policy. For more information, see the *Data User's Guide* and *Methodology Report*.

Beginning with the 2023 data year, CMS releases five sets of MCBS files annually, three Limited Data Sets (LDS)² and two Microdata Public Use Files (PUFs). Exhibit 1.1 provides an overview of the 2024 LDS releases: Survey File - Early Release, Survey File, and Cost Supplement File. The data within the LDS releases are organized into data segments.

Exhibit 1.1: Overview of 2024 MCBS Limited Data Sets

	Survey File - Early Release	Survey File	Cost Supplement File
File Contents	<ul style="list-style-type: none"> Timely fall data on key topics such as beneficiaries' socio-demographic information; self-reported health status, conditions, and functioning; disability; and access to and satisfaction with care 	<ul style="list-style-type: none"> Fall data released on the Survey File - Early Release as well as annualized data on topics such as health insurance coverage Data on additional topics (e.g., income, debt, knowledge of the Medicare program, etc.) collected in the winter and summer rounds of the next calendar year Facility information, administrative records and assessment data, and Fee-for-Service (FFS) claims data 	<ul style="list-style-type: none"> Comprehensive accounting of beneficiaries' health care use, expenditures, and sources of payment Linked survey-reported and Medicare FFS and Part D claims data
Data Collection Timeframe	Fall only	Annualized	Annualized

¹ The MCBS is authorized by section 1875 (42 USC 1395II) of the Social Security Act and is conducted by NORC at the University of Chicago for the U.S. Department of Health and Human Services. The OMB Number for this survey is 0938-0568.

² For the 2015 through 2022 data years, CMS released two MCBS LDS files annually, the Survey File and the Cost Supplement File. Beginning with the 2023 data year, CMS releases a subset of the Survey File LDS segments early via the Survey File - Early Release LDS to improve the timeliness of MCBS data. The Survey File LDS and Cost Supplement File LDS continue to be released annually.

	Survey File - Early Release	Survey File	Cost Supplement File
Population Represented	Community only	Community and facility	Community and facility
Weights Available	Cross-sectional ever enrolled and select Topical weights	Cross-sectional ever enrolled, cross-sectional continuously enrolled, longitudinal, and Topical weights	Cross-sectional ever enrolled and longitudinal weights
Inclusion of Enrollment and Claims Data	Limited enrollment information; no FFS claims	Detailed enrollment information; five years of enrollment data; five years of FFS claims	No enrollment information; linked FFS and Medicare Part D claims
Supports Standalone Analysis?	Yes	Yes	No
Intended for Analysis with Other MCBS LDS Files?	No	Yes (with Cost Supplement File)	Yes (with Survey File)
Approximate Release Timeframe	Within nine months after the close of the calendar year	18 months after the close of the calendar year	Three months after the Survey File

Information on content and access to the MCBS Microdata PUFs, including codebooks and additional documentation on the data release, can be found at <https://data.cms.gov/medicare-current-beneficiary-survey-mcbs>.

For questions or suggestions on this document or other MCBS data-related questions, please email MCBS@cms.hhs.gov.

1.1 Contents of the Data Year Release Notes

The *2024 Data Year Release Notes* contains detailed information about the annual MCBS LDS releases. Data users can access this resource along with other data documentation at <https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-documentation-codebooks>. The *2024 Data Year Release Notes* is initially released to accompany the Survey File - Early Release LDS. This documentation is then updated and re-released for the Survey File LDS and again for the Cost Supplement File LDS (see the Version Control Log for information on the current version).

Here is an overview of the contents of the *2024 Data Year Release Notes*:

- Section 2: This section provides information on sampling, questionnaires, interviewing, data collection, and data releases for the 2024 data year.
- Section ER: This section provides specific information on the Survey File - Early Release LDS release, including a description of any changes and an overview of each segment included in the release.
- Section SF: Once available, this section provides specific information on the Survey File LDS release, including a description of any changes and an overview of each segment included in the release.
- Section CS: Once available, this section provides specific information on the Cost Supplement File LDS release, including a description of any changes and an overview of each segment included in the release.

Please note the following terminology preferences for the MCBS used throughout this document:

- *Beneficiary* refers to a person receiving Medicare services who may or may not be participating in the MCBS.³ Beneficiary may also refer to an individual selected from the MCBS sample about whom the MCBS collects information.
- *Respondent* is the person who answers questions for the MCBS; this person can be the beneficiary, a proxy, or a staff member located at a facility where the beneficiary resides (i.e., the Facility respondent).
- The *data collection year* refers to the three rounds of data collection (winter, summer, and fall) that occur within the calendar year (e.g., Winter 2024, Summer 2024, and Fall 2024 for 2024).
- The *data year* refers to the data collected over the three years that are included in the LDS release (e.g., 2023, 2024, and 2025 for the 2024 LDS).

1.2 Data Access

All requested LDS files require a signed LDS Data Use Agreement (DUA) between CMS and the data requestor to ensure that the data remain protected against unauthorized disclosure. Data users can submit an LDS request via a CMS DUA tracking system, the Enterprise Privacy Policy Engine or EPPE. EPPE can be used to initiate a new LDS DUA request or to amend/update an existing LDS DUA. Questions about LDS files or the process for requesting LDS files can be sent to datauseagreement@cms.hhs.gov. For additional information on data access and the DUA process, including instructions for accessing and using EPPE to order LDS files and pricing information, data users can visit the CMS LDS website at <https://www.cms.gov/data-research/files-for-order/data-disclosures-and-data-use-agreements-duas/limited-data-set-lds>. Each MCBS LDS data release contains multiple files (or segments) that are linkable through a key identification variable (BASEID).

1.3 Guidelines for Citation of Data Source

This communication was printed, published, or produced and disseminated at U.S. taxpayer expense. All material appearing in this document is in the public domain and may be reproduced or copied without permission; citation as to source, however, is appreciated. Accordingly, CMS requests that data users cite CMS and the MCBS as the data source in any publications or research based upon these data. Suggested citation formats are below.

Tables and Graphs: The suggested citation below all tables and graphs should read:

SOURCE: Centers for Medicare & Medicaid Services, Medicare Current Beneficiary Survey, [Data File, (e.g., Cost Supplement File Limited Data Set)], [Year].

Bibliography: The suggested citation for this document should read:

SOURCE: Centers for Medicare & Medicaid Services. [Year] *Medicare Current Beneficiary Survey Data Year Release Notes*. Retrieved from [ADD URL], [YEAR ACCESSED].

Survey Data: The suggested citation for the MCBS survey data files and other documentation should read:

SOURCE: Centers for Medicare & Medicaid Services. Medicare Current Beneficiary Survey, [Data File, (e.g., Cost Supplement File Limited Data Set)] data. Baltimore, MD: U.S. Department of Health and Human Services, [Year].

³ <https://www.cms.gov/Medicare/Medicare-General-Information/MedicareGenInfo/index.html>

1.4 Data User Resources

CMS provides technical assistance to researchers interested in using MCBS data and provides free consultation to users interested in obtaining these data products and using these data in research. Users can email MCBS@cms.hhs.gov with questions regarding obtaining or using the data. Exhibit 1.4.1 provides the links to MCBS documentation and other data user resources.

Exhibit 1.4.1: Table of Links to MCBS Documentation and Resources

MCBS Resources	Links
CMS MCBS website	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey
MCBS LDS file information	https://www.cms.gov/data-research/files-for-order/data-disclosures-and-data-use-agreements-duas/limited-data-set-lds
MCBS Microdata PUFs	https://data.cms.gov/medicare-current-beneficiary-survey-mcbs
CMS Chronic Conditions Warehouse (CCW)	https://www.ccwdata.org/web/guest/home/
MCBS Documentation: Data Year Release Notes, Summary of Changes, Data User's Guides, Methodology Reports, Codebooks, and LDS Variable Crosswalks	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-documentation-codebooks
PUF Table Packages and Chartbook PDFs	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-tables
Early Look, Data Briefs, Infographics, and Tutorials	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-briefs-tutorials
Bibliography	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/bibliography
Questionnaires and Questionnaire User Documentation	https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/questionnaires
MCBS Interactives – COVID-19 Data Tool, Survey File PUF Data Tool, and Financial Well-being Data Tool ⁴	https://mcbs-interactives.norc.org/
Chartbook ⁵	https://data.cms.gov/medicare-current-beneficiary-survey-mcbs

⁴ The MCBS Interactives consist of three data tools, the Financial Well-being Data Tool, the Survey File PUF Data Tool and the COVID-19 Data Tool. Each tool contains multiple interactive dashboards that allow users to sort and visualize data according to a variety of demographic and health-related factors.

⁵ Beginning with the release of 2021 MCBS data, the MCBS Chartbook website replaced the PDF version of the MCBS Chartbook that was updated and released annually on the CMS MCBS website to disseminate current estimates on the Medicare population. MCBS estimates from 2015 through 2020 can be found in both the online version of the MCBS Chartbook and the previous MCBS Chartbook PDFs at <https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/data-tables>.

2. 2024 DATA YEAR CONTENT

2.1 Questionnaires

The MCBS Community Questionnaire is administered to beneficiaries living in the community (i.e., not in a long-term care facility such as a nursing home) during the reference period covered by the MCBS interview and may be conducted with the beneficiary or a proxy. In addition to including data collected in the three rounds (winter, summer, and fall) administered during the calendar year, the 2024 MCBS LDS include some data collected in 2023 that are carried forward to fill in data for 2024 when questionnaire items are administered only once or when data are missing for the data year but valid values exist for the previous year. Some data collected in Winter and Summer 2025 are “pulled back” for inclusion in the 2024 LDS because the section’s reference period extends back to 2024. The Facility Instrument is administered for beneficiaries living in facilities during the reference period covered by the MCBS interview and is conducted with staff members located at the facility. For more information on the MCBS Questionnaires, see the *Data User’s Guide* and *Methodology Report*. Additionally, descriptions of each of these questionnaire sections can be found in the *MCBS Questionnaire User Guide*: <https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/questionnaires>.

2.1.1 Core Community Questionnaire Sections

Exhibit 2.1.1 lists each Core section of the Community Questionnaire that contributes to the 2024 LDS.

Exhibit 2.1.1: 2024 Data Year MCBS Community Core Sections by Data File and Data Collection Schedule

Section Group	Abbr.	Section Name	LDS ⁵	Data Collection Schedule
Socio-Demographics	IAQ	Income and Assets	SF	Summer 2025
	DIQ	Demographics/Income	ER, SF	Fall 2024, Baseline Interview
Health Insurance	HIQ	Health Insurance	ER, SF	All Seasons
Utilization*	DVH	Dental, Vision and Hearing Care Utilization	CS	All Seasons
	ERQ	Emergency Room Utilization	CS	All Seasons
	IPQ	Inpatient Hospital Utilization	CS	All Seasons
	OPQ	Outpatient Hospital Utilization	CS	All Seasons
	IUQ	Institutional Utilization	CS	All Seasons
	HHQ	Home Health Utilization	CS	All Seasons
	MPQ	Medical Provider Utilization	CS	All Seasons
	OMQ	Other Medical Expenses Utilization	CS	All Seasons
	PMQ	Prescribed Medicine Utilization	CS	All Seasons
Cost*	STQ	Statement Cost Series	CS	All Seasons
	PSQ	Post-Statement Charge	CS	All Seasons
	NSQ	No Statement Charge	CS	All Seasons
	CPS	Charge Payment Summary	CS	All Seasons
Experiences with Care	ACQ	Access to Care	SF	Winter 2025
	SCQ	Satisfaction with Care	ER, SF	Fall 2024
	TLQ	Telemedicine	SF	Winter 2025
	USQ	Usual Source of Care	SF	Winter 2025

Section Group	Abbr.	Section Name	LDS [§]	Data Collection Schedule
Health Status	HFQ	Health Status and Functioning	ER, SF	Fall 2024
	CMQ	Cognitive Measures	ER, SF	Fall 2024

SOURCE: MCBS Community Questionnaire

*New respondents receiving the Baseline interview do not receive Core sections about health care utilization and costs; these sections are reserved for Continuing respondents. As such, in Fall 2024, only persons in the 2021, 2022, and 2023 Panels received the Core sections about health care utilization and health care costs.

[§]Limited Data Set (LDS) indicates the file where the questionnaire data appear (i.e., ER = Survey File - Early Release, SF = Survey File, CS = Cost Supplement File).

2.1.2 Topical Community Questionnaire Sections

Exhibit 2.1.2 lists each Topical section of the Community Questionnaire that contributes to the 2024 LDS.

Exhibit 2.1.2: 2024 Data Year MCBS Community Topical Sections by Data File and Data Collection Schedule

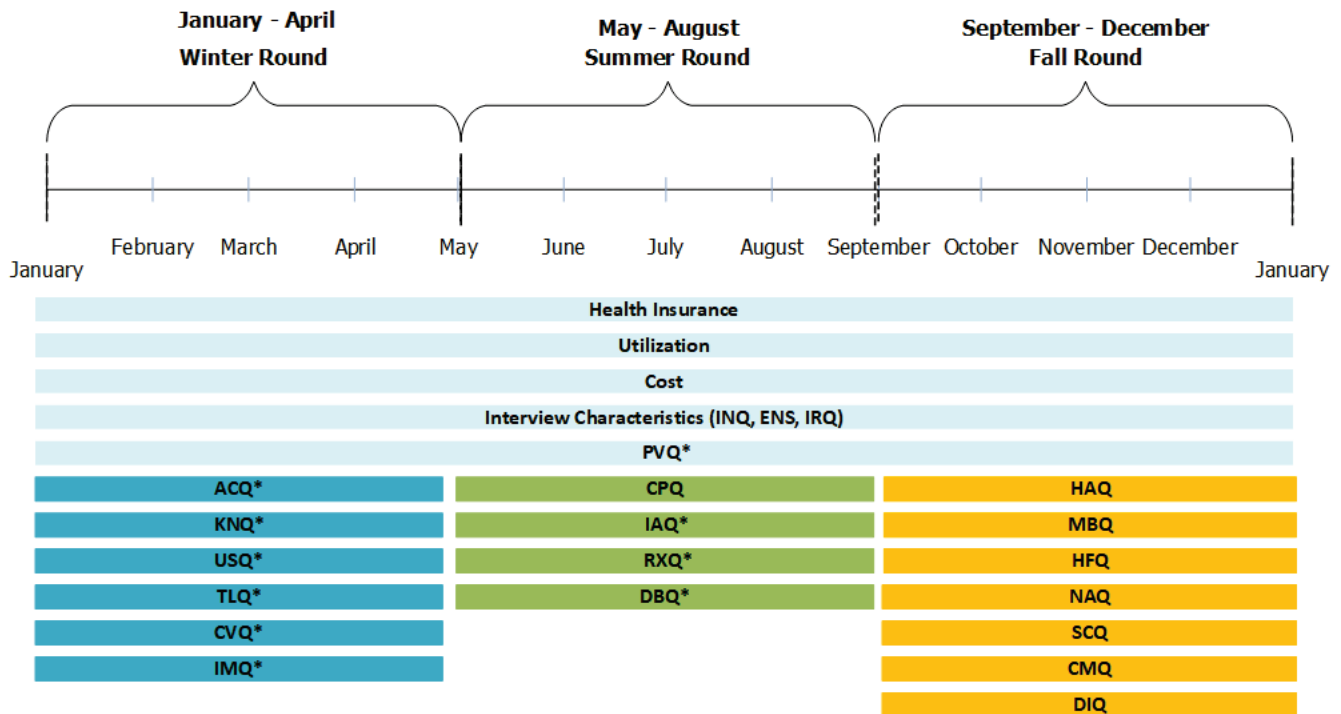
Section Group	Abbr.	Section Name	LDS [§]	Data Collection Schedule
Housing Characteristics	HAQ	Housing Characteristics	ER, SF	Fall 2024
Social Determinants of Health or Health Behaviors	CPQ	Chronic Pain	SF	Summer 2025
	MBQ	Mobility of Beneficiaries	ER, SF	Fall 2024
	NAQ	Nicotine and Alcohol Use	ER, SF	Fall 2024
	PVQ	Preventive Care	ER, SF	Fall 2024, Winter 2025, and Summer 2025
	IMQ	Immunization	SF	Winter 2025
	DBQ	Debt	SF	Summer 2025
	IAQ	Food Insecurity items	SF	Summer 2025
COVID-19	CVQ	COVID-19	SF	Winter 2025
Knowledge and Decision Making	KNQ	Beneficiary Knowledge and Information Needs	SF	Winter 2025
	RXQ	Drug Coverage	SF	Summer 2025

SOURCE: MCBS Community Questionnaire

[§]LDS indicates the file where the questionnaire data appear (i.e., ER = Survey File - Early Release, SF = Survey File, CS = Cost Supplement File).

2.1.3 Community Questionnaire Section Rotation within a Data Year

Exhibit 2.1.3 presents the MCBS Questionnaire section rotation schedule for 2024. The 2024 MCBS data releases reflect data collected from January 2024 through December 2024 and include data collected in Winter and Summer 2025 rounds from questionnaire sections with a 2024 reference period. Note, while the Physical Measures Questionnaire (PXQ) was fielded in Summer 2024, these data were included in the 2023 LDS; PXQ was not fielded in 2025 and these data will not appear on the 2024 LDS, so this questionnaire section is excluded from this exhibit. While PVQ is administered in all rounds, the data are released on different LDS segments. For the 2024 MCBS LDS, Fall 2024 PVQ data appear on the PREVCARE segment (released on both the Survey File - Early Release and Survey File), while Winter and Summer 2025 PVQ data appear on the IMQ segment (released on just the Survey File).

Exhibit 2.1.3: 2024 Data Collection Year MCBS Community Questionnaire Section Rotation**Typical MCBS Data Collection Year**

*Fielded in 2025, but given the reference period is 2024, data are included in the 2024 LDS.

2.1.4 Facility Core Questionnaire Sections

Exhibit 2.1.4 lists each Core section of the Facility Instrument that contributes to the 2024 LDS.

Exhibit 2.1.4: 2024 Data Year MCBS Facility Core Sections by Data File and Data Collection Schedule

Section Group	Abbr.	Section Name	LDS [§]	Data Collection Schedule
Facility Characteristics	FQ	Facility Questionnaire	SF	All Seasons
Socio-Demographics	RH	Residence History	SF	All Seasons
	BQ	Background	SF	Fall 2024, Baseline Interview*
Health Insurance	IN	Health Insurance	SF	Fall 2024 [±]
Utilization	US	Use of Health Services	CS	All Seasons
Cost	EX	Expenditures	CS	All Seasons
Health Status	HS	Health Status	SF	Fall 2024 [±]

SOURCE: MCBS Facility Instrument

*The BQ section is also administered to Community-to-Facility Crossover cases each season.

[±]The IN and HS sections are also administered to Community-to-Facility and Facility-to-Facility cases each season.

[§]Limited Data Set (LDS) indicates the file where the questionnaire data appears (i.e., SF = Survey File, CS = Cost Supplement File). Note, no Facility data are released on the 2024 Survey File - Early Release LDS.

2.1.5 Facility Topical Questionnaire Sections

Exhibit 2.1.5 lists the Topical section of the Facility Instrument that contribute to the 2024 LDS.

Exhibit 2.1.5: 2024 Data Year MCBS Facility Topical Sections by Data File and Data Collection Schedule

Section Group	Abbr.	Section Name	LDS [§]	Data Collection Schedule
COVID-19	CV	COVID-19 Beneficiary	SF	Winter 2024, Baseline Interview*

SOURCE: MCBS Facility Instrument

*The CV section is also administered to Community-to-Facility and Facility-to-Facility Crossover cases each season.

[§]Limited Data Set (LDS) indicates the file where the questionnaire data appear (i.e., SF = Survey File, CS = Cost Supplement File). Note, no Facility data are released on the 2024 Survey File - Early Release LDS.

2.2 Sampling

Drawn from a subset of Medicare enrollment data, the beneficiaries included in the 2024 MCBS LDS releases represent a random cross-section of all beneficiaries residing in the continental U.S. who were ever enrolled in either Part A or Part B of the Medicare program for any portion of 2024. A subset of these beneficiaries represents a random cross-section of all beneficiaries who were continuously enrolled from January 1, 2024 up to and including interviews conducted during Fall 2024. The MCBS uses a rotating panel sample design, so the 2024 MCBS LDS's represent four separate MCBS panels identified by the year in which the panel was selected and first interviewed (i.e., the 2021, 2022, 2023, and 2024 Panels). The beneficiaries selected in Fall 2020 exited the study at the conclusion of the Winter 2024 round. See the *Data User's Guide* and *Methodology Report* for additional information on sampling.

There were no changes to sampling for the 2024 data year.

2.2.1 Targeted Population and Sampling Strata

The targeted population for the MCBS consists of persons enrolled in Medicare Part A or Part B as of December 31 of the applicable sampling year (e.g., 2024 for the 2024 Panel) whose address in the Medicare files is in one of the 48 contiguous states (excludes Alaska and Hawaii) or the District of Columbia. Additionally, in the 2021, 2022, 2023, and 2024 Panels, beneficiaries residing within the U.S. who were Hispanic were oversampled to improve precision of estimates for this group. See the *MCBS Methodology Report* for more information about this oversample. Exhibit 2.2.1 displays the beneficiaries selected as part of the 2024 Panel, by age and ethnicity.

Exhibit 2.2.1: 2024 Panel of Selected Beneficiaries by Hispanic and Non-Hispanic Ethnicity Classification and Age Category*

Age Category as of 12/31/2024	TOTAL Sample Size	TOTAL Weighted	Hispanic Sample Size	Hispanic Weighted	Non-Hispanic Sample Size	Non-Hispanic Weighted
Under 45 years	1,187	1,610,948	131	191,000	1,056	1,419,948
45-64 years	1,357	5,767,370	170	502,864	1,187	5,264,506
65-69 years	2,943	17,747,512	347	1,470,763	2,596	16,276,749
70-74 years	2,246	15,976,034	266	1,396,910	1,980	14,579,124
75-79 years	2,354	12,647,764	279	920,172	2,075	11,727,593

Age Category as of 12/31/2024	TOTAL Sample Size	TOTAL Weighted	Hispanic Sample Size	Hispanic Weighted	Non-Hispanic Sample Size	Non-Hispanic Weighted
80-84 years	2,537	7,940,064	300	588,970	2,237	7,351,094
85+ years	2,784	7,091,532	329	482,435	2,455	6,609,097
Total	15,408	68,781,224	1,822	5,553,115	13,586	63,228,110

SOURCE: Beneficiary age, race/ethnicity, and base weights were sourced from administrative data in the 2024 MCBS Internal Sample Control File.

2.2.2 Sample Selection

Exhibit 2.2.2 provides a summary of the number of selected beneficiaries and the inclusion criteria for the 2021 through 2024 Panels included in the 2024 MCBS LDS's.

Exhibit 2.2.2: 2024 MCBS Sample Selection for the LDS Releases

Panel	# of Selected Beneficiaries	Previously Enrolled Beneficiaries Still Alive as of January 1 of Panel Year	Current-Year Enrollees
2021	15,950	Enrolled before 1/1/2021	Enrolled 1/1/2021 – 12/31/2021
2022	17,139	Enrolled before 1/1/2022	Enrolled 1/1/2022 – 12/31/2022
2023	15,077	Enrolled before 1/1/2023	Enrolled 1/1/2023 – 12/31/2023
2024	15,408	Enrolled before 1/1/2024	Enrolled 1/1/2024 – 12/31/2024

SOURCE: 2024 MCBS Internal Sample Control File

2.2.3 Completed Interviews

Exhibit 2.2.3 lists the number of completed interviews for the Fall 2024 Continuing (2021, 2022, and 2023) and Incoming (2024) Panels by age strata.

Exhibit 2.2.3: 2024 MCBS Fall Round Completed Interviews: Continuing and Incoming Panels

Age Category as of 12/31/2024	2021 Panel	2022 Panel	2023 Panel	2024 Panel	Total
Under 45 years	98	150	282	516	1,046
45-64 years	186	242	334	639	1,401
65-69 years	197	324	600	1,225	2,346
70-74 years	386	468	622	947	2,423
75-79 years	330	441	544	1,017	2,332
80-84 years	296	421	559	1,078	2,354
85+ years	387	523	708	1,100	2,718
Total	1,880	2,569	3,649	6,522	14,620

SOURCE: 2024 MCBS Internal Sample Control File

2.3 Interviewer Recruitment, Staffing, and Training

In 2024, most MCBS field interviewers were experienced, having conducted interviews for at least a year or more. New interviewers were recruited to the project in Fall 2024 based on staffing needs and attrition.

The 2024 MCBS Training Program consisted of the following:

- Experienced interviewers received remote trainings focused on new content and round-specific reminders ahead of the winter, summer, and fall rounds of data collection. Experienced interviewers who were previously trained on the PXQ section of the interview received a remote refresher training on this section in Summer 2024.⁶
- New staff were onboarded and trained remotely on the Baseline interview in Fall 2024. This training included self-study modules in the learning management system, roundtable discussions with experienced interviewers and field managers, gaining cooperation role playing, and protocol demonstrations.
- Later in the fall round, new staff were trained in-person on the Continuing interview. This 4.5-day training focused on the essential skills and protocols in the Continuing interview that require in-person instruction, such as correctly prompting for health events and purchases, organizing and abstracting from health and insurance documentation, and balancing complex caseloads.
- The selected interviewers trained to administer the Facility interview received a short training focused on new content and round-specific reminders ahead of each round of data collection. In the winter, they received a more robust refresher training focused on general Facility interviewing skills. A new cohort of experienced interviewers were trained to administer the Facility interview ahead of the winter round.
- Formal trainings were supplemented with ad hoc additional training interventions, including weekly field memos, group calls, and interviewer observations, referred to as “ride-alongs” or “call-alongs.”

2.4 Data Collection Schedule and Results

Exhibit 2.4.1 shows the data collection schedule for the 2024 calendar year.

Exhibit 2.4.1: 2024 MCBS Data Collection Schedule

Round	Start Date	End Date
Winter 2024 (Round 98)	January 8, 2024	April 21, 2024
Summer 2024 (Round 99)	May 1, 2024	August 4, 2024
Fall 2024 (Round 100)	July 15, 2024	December 31, 2024

There were no changes to data collection for the 2024 data year.

Beneficiaries often require assistance in providing the detailed information needed to accurately respond to survey items, so during data collection, the beneficiary may designate a proxy to participate in the interview on their behalf or an assistant to provide help when responding to specific survey questions. Approximately 12-13 percent of interviews had proxy usage and approximately 9-10 percent of interviews had assistant usage. Additionally, the Community Questionnaire is programmed for administration in English or Spanish, while the Facility Instrument is available for administration in English. Approximately 5 percent of Community components were conducted in Spanish in 2024. For more information on proxy and assistant usage and interviewing languages, see the *MCBS Methodology Report*.

An interview is complete once the administration of all questionnaire sections to the respondent has concluded, the Interviewer Remarks Questionnaire (IRQ) is completed, and data are fully transmitted. Exhibit 2.4.2 provides the count of completed interviews by round and component for 2024. Exhibit 2.4.3 provides the ratio of completed interviews by interview mode.

⁶ While this training occurred during the 2024 calendar year, the Summer 2024 PXQ data were pulled back and included in the 2023 Cost Supplement File LDS.

Exhibit 2.4.2: 2024 Completed Interviews by Component

Round	Component	Completed Interviews	Median Interview Duration (minutes)
Winter 2024	Community	11,438	60.8
	Facility	877	23.4
Summer 2024	Community	8,468	55.6
	Facility	723	25.3
Fall 2024	Community	13,642	69.4
	Facility	985	39.1

Exhibit 2.4.3: 2024 Completed Interviews by Interview Mode

Round	Component	Phone Interviews	In-Person Interviews
Winter 2024	Community	80%	20%
	Facility	96%	4%
Summer 2024	Community	73%	27%
	Facility	96%	4%
Fall 2024	Community	70%	30%
	Facility	94%	6%

2.5 Clearance

CMS maintains a current OMB clearance for the MCBS. For the 2024 MCBS, CMS received OMB approval on September 12, 2023 (OMB control number 0938-0568, expiration date 8/31/2025). The NORC IRB reviews and approves all MCBS data collection protocols, questionnaires, and respondent materials to ensure human subject protections are properly addressed before field data collection begins. The research protocol and consent procedures for MCBS data collection were first approved by NORC's IRB in July 2014, with subsequent changes to the protocol approved through amendments and annual renewal.

2.6 Initial Interview Variables

Some questions are asked in only two scenarios: 1) it is the case's Baseline (initial) interview or 2) it is the first time the case has crossed to a new component (e.g., the case crosses from the Community component to the Facility component for the first time). These "initial interview variables" are not asked again during subsequent interviews because the responses are not likely to change. The 2024 LDS variables that have been processed this way are listed in Exhibit 2.6.1.

Exhibit 2.6.1: Initial Interview Variables in the 2024 LDS

Segment ¹	Topic	LDS Variable Name
ER_DEMO/DEMO	Date of Birth	D_DOB
ER_DEMO/DEMO	Sexual Orientation	SEXORINT
ER_DEMO/DEMO	Hispanic Origin	HISPORIG; HISPORMA; HISPORPR; HISPORCU; HISPOROT

Segment ¹	Topic	LDS Variable Name
ER_DEMO/DEMO	Race	D_RACE2; RACEAA; RACEAS; RACENH; RACEWH; RACEAI
ER_DEMO/DEMO	Asian Race Subcategories	RACEASAI; RACEASCH; RACEASFI; RACEASJA; RACEASKO; RACEASVI; RACEASOT
ER_DEMO/DEMO	Pacific Islander Race Subcategories	RACEPIHA; RACEPIGU; RACEPISA; RACEPIOT
ER_DEMO/DEMO	Military Service	SPAFEVER; SPAFVIET; SPAFKORE; SPAFWWII; SPAFGULF; SPAFIRAF; SPAFPEAC; SPNGEVER; SPNGALL; SPNGDSBL; SPVARATE
ER_DEMO/DEMO	Number of Children	SPCHNLNM
ER_DEMO/DEMO	Limited English Proficiency	ENGWELL; ENGREAD; OTHRLANG; WHATLANG
ER_DEMO/DEMO	Religious Preference	RELGPREF
ER_DEMO/DEMO	Education	SPDEGRCV
ER_CHRNCOND/ CHRNCOND	Reason for Medicare Eligibility	EMHBP; EMMYOCAR; EMCHD; EMCFAIL; EMHRTCND; EMSTROKE; EMCSKIN; EMCANCER; EMARTERY; EMARTHHR; EMARTOST; EMARTHOT; EMMENTAL; EMALZMER; EMDEMENT; EMDEPRSS; EMPSYCHO; EMOSTEOP; EMBRKHIP; EMPARKIN; EMEMPHYS; EMPPARAL; EMAMPUTE; EMDIABTS; EMOTHOS
ER_CHRNCOND/ CHRNCOND	Number of Medications Taken for Blood Pressure	HYPEMANY
FACCHAR	Place of Residence before Facility Admission	BEFORADM
FACCHAR	Household Makeup before Facility Admission	D_LIVWTH

¹ Variables listed with more than one segment are released on both the Survey File - Early Release and Survey File.

2.7 MCBS Rounds by Data Year and Season

Exhibit 2.7.1 lists the MCBS data collection rounds by year and by season that pertain to data included in the 2024 MCBS LDS files.

Exhibit 2.7.1: MCBS Rounds by Data Year and Season through Fall 2025

Year	Winter	Summer	Fall
2021	89	90	91
2022	92	93	94
2023	95	96	97
2024	98	99	100
2025	101	102	103

2024 Survey File - Early Release LDS

ER1. SURVEY FILE - EARLY RELEASE LDS

The content of the MCBS LDS releases is governed by their central focus of serving as unique sources of information on beneficiaries' health and well-being that cannot be obtained through CMS administrative sources alone. For the 2024 data year, the Survey File - Early Release LDS contains data collected directly from Community respondents during the fall data collection round supplemented by some administrative data. The Survey File - Early Release is released approximately nine months after the end of data collection to allow for timely analysis.

The 2024 Survey File - Early Release LDS includes beneficiaries who were alive, enrolled in Medicare, and completed a Community interview in Fall 2024. The release comprises a total of 19 segments containing the following information: beneficiary demographics; disability; health behaviors; health status, conditions, and functioning; household characteristics; mobility; patient activation; and access to and satisfaction with care. The LDS also contains select information on health insurance coverage and preventive care as of the fall round. Section ER2 contains more information about these data and describes changes since 2023.

The Survey File - Early Release LDS comprises a subset of the segments released on the annual Survey File LDS (i.e., all segments released on the Survey File - Early Release will also be released on the Survey File). To distinguish the Survey File - Early Release segments from the Survey File segments, the Early Release versions begin with the abbreviation "ER_." Notably, the 2024 Survey File - Early Release LDS provides abbreviated versions of two segments compared to the Survey File LDS: Demographics (DEMO) and Health Insurance Summary (HISUMRY). The complete, annualized versions of the DEMO and HISUMRY segments will be reprocessed and released on the 2024 Survey File LDS. Data users can merge segments within the 2024 Survey File - Early Release. The LDS provides cross-sectional weights for the ever enrolled population and Topical weights with a non-proxy adjustment based on preliminary enrollment data. Longitudinal weights are not available for these data, nor are cross-sectional weights for the continuously enrolled population.

ER2. WHAT'S NEW FOR DATA YEAR 2024?

This section describes questionnaire updates and variable changes that pertain to the 2024 Survey File - Early Release LDS.

ER2.1 Questionnaires

Questionnaire content changes: There were a number of questionnaire sections revised in Fall 2024. Note that variable names referenced below are the questionnaire variable names. Data users can view the questionnaires, including the questionnaire variable names referenced below and question text at: <https://www.cms.gov/data-research/research/medicare-current-beneficiary-survey/questionnaires>.

Community Questionnaire

The MCBS introduced several Community Questionnaire updates in Fall 2024 to enhance survey content and data quality and improve interviewer and respondent experience. Changes include the addition of new items and updates to question text, response options, and respondent universes.

Demographics and Income (DIQ)

The Demographics and Income (DIQ) section is typically fielded to Baseline cases only. However, in Fall 2023, select items were administered to all cases, including Continuing cases. This required updating routing throughout DIQ to accommodate fielding to Continuing cases. In Fall 2024, the routing logic was reverted to the original routing so that only Baseline cases receive DIQ.

Health Insurance (HIQ)

In 2024, two updates were made to improve the Health Insurance Questionnaire (HIQ):

- A routing error was identified at MHMOSAME, which collects whether the beneficiary is still covered by their Medicare Advantage (MA) plan. For beneficiaries with a preloaded MA plan, the routing logic for the "Don't Know" and "Refused" responses at MHMOSAME was erroneously swapped for a small number of cases. The routing logic was corrected in Winter 2024.
- Two new items on Veterans Affairs (VA) enrollment and utilization were added to HIQ in Fall 2024. These items were sourced from the National Health Interview Survey (NHIS)⁷ and are fielded to beneficiaries who previously reported serving in the Armed Forces. The first item (VACARCOV) replaced an existing item (VACOVER) and is fielded annually during the fall round. VACARCOV collects whether the beneficiary received care at a VA facility or care paid for by the VA. The second item, VAENROLL, is fielded to beneficiaries who report "No" at VACARCOV and captures enrollment in VA health care. This item is fielded annually until the beneficiary reports "Yes." Together, these two items capture beneficiaries who may have had VA coverage but did not use VA health care services during the reference period.

Health Status and Functioning (HFQ)

Several new items were added to the Health Status and Functioning Questionnaire (HFQ) in Fall 2024:

⁷ National Center for Health Statistics. "2024 NHIS Survey Questionnaire – English." Centers for Disease Control and Prevention. 2023. https://ftp.cdc.gov/pub/Health_Statistics/NCHS/Survey_Questionnaires/NHIS/2024/EnglishQuest.pdf

- The 5-Item Oral Health Impact Profile (OHIP-5) scale⁸ was added to HFQ. This scale assesses oral function, orofacial pain, orofacial appearance, and the psychosocial impact of having any problems with teeth, mouth, dentures, or jaw.
- Five items on beneficiary quality of life in relation to bowel incontinence were added to HFQ. These items were modeled after the existing HFQ items on urinary incontinence and similar items from a 2004 Mayo Clinic Study.⁹
- Two new items were added to collect data on the mode of insulin administration (INSUMODE) and whether the respondent had difficulty paying for insulin in the prior year (INSUTRBL). INSUMODE was adapted from the Natividad Diabetes Self-Management Questionnaire¹⁰ while INSUTRBL was modeled after existing MCBS items HCTROUBL and PAYPROB. These items are fielded annually to beneficiaries with diabetes who report using insulin.
- A new preload was added so that respondents who previously reported having gestational diabetes, but no other type of diabetes, do not receive the follow-up items associated with non-gestational diabetes.
- The universe of respondents at COLRECNT was modified. COLRECNT collects when the beneficiary returned their most recent blood stool test. The universe now excludes beneficiaries who reported receiving an at-home blood stool test from their provider but never returned the completed samples. COLRECNT was renamed RECNTCOL to reflect the universe change.

Housing Characteristics (HAQ)

In Fall 2024, two updates were made to the Housing Characteristics Questionnaire (HAQ) to assist with administration:

- HOUSTYPE asks the beneficiary if their place of residence is part of a type of community, such as a retirement community or assisted living facility. If they report yes, HCOMUNTY collects what category of community best describes their living situation. To aid with telephone interviews, the list of community types that appear at HCOMUNTY was added as on-screen help text to HOUSTYPE.
- Similarly, to assist with telephone interviewing, examples of personal care services were added as on-screen help text to HPERCARE, which asks whether the beneficiary's place of residence grants access to personal care services.

Satisfaction with Care (SCQ)

- In Fall 2023, items about perceived discrimination within the prior year by health care providers based on aspects of the beneficiary's identity were added to SCQ. To account for beneficiaries who have not received medical care in the last 12 months, a "not applicable" response option was added for these items in Fall 2024.

Facility Instrument

The MCBS introduced several Facility Instrument updates in Fall 2024 that included streamlining of the instrument and updates to question text and programming logic. However, given no Facility data are released on the Survey File - Early Release LDS, these changes will be documented in the *2024 Data Year Release Notes* for the Survey File LDS.

⁸ Naik A, John MT, Kohli N, Self K, Flynn P. "Validation of the English-language version of 5-item Oral Health Impact Profile." *J Prosthodont Res*, 60, no. 2. (2016):85-91. doi: 10.1016/j.jpor.2015.12.003.

⁹ Bharucha AE, Locke GR 3rd, Seide BM, Zinsmeister AR. "A new questionnaire for constipation and faecal incontinence." *Aliment Pharmacol Ther* 20, no. 3 (2004):355-64. doi: 10.1111/j.1365-2036.2004.02028.x.

¹⁰ Natividad. "Diabetes self-management questionnaire." October 2013. <https://www.natividad.com/wp-content/uploads/2018/04/Natividad-Diabetes-Questionnaire-English.pdf>

ER2.2 Data Processing and LDS Content

The 2024 Survey File - Early Release is built from analytic data files from Fall 2024 Community data collection, as well as some administrative data. These files are input into CMS processes that generate the final data files available to the public.

New and Revised Content:

For the 2024 Survey File - Early Release LDS, there is one new segment: ORALHLTH, which contains the new OHIP-5 items as well as oral health variables formerly included on other LDS segments. Additionally, the segment ER_COVIDEXP was retired effective 2024 due to a change in the administration of the CVQ section to winter round only.

The following exhibits document the Survey File - Early Release LDS variable changes that resulted from the 2024 questionnaire changes. Exhibit ER2.2.1 lists variables that were added to the 2024 LDS.

Exhibit ER2.2.1: 2024 MCBS Survey File - Early Release LDS Content Additions

Segment	Quex. Section	Variable	Variable Label
ER_ORALHLTH	HFQ	ORALPAIN	HOW OFTEN PAIN IN MOUTH
ER_ORALHLTH	HFQ	CHEWPROB	HOW OFTEN DIFFICULTY CHEWING
ER_ORALHLTH	HFQ	ORALLOOK	HOW OFTEN UNCOMFORTABLE ABOUT APPEARANCE OF TEETH/MOUTH
ER_ORALHLTH	HFQ	JOBTEETH	HOW OFTEN DIFFICULTY WITH USUAL ACTIVITES DUE TO TEETH/MOUTH
ER_ORALHLTH	HFQ	LESSFLAV	HOW OFTEN LESS FLAVOR IN FOOD DUE TO PROBLEMS WITH TEETH/MOUTH
ER_CHRNCOND	HFQ	PROBFECE	BOWEL PROBLEMS - LEAKING GAS
ER_CHRNCOND	HFQ	SMLSTOOL	BOWEL PROBLEMS - LEAKING SMALL AMOUNT OF STOOL
ER_CHRNCOND	HFQ	MODSTOOL	BOWEL PROBLEMS - LEAKING MODERATE AMOUNT OF STOOL
ER_CHRNCOND	HFQ	LRGSTOOL	BOWEL PROBLEMS - LEAKING LARGE AMOUNT OF STOOL
ER_CHRNCOND	HFQ	TALKFECE	DID SP TALK TO DR ABOUT BOWEL INCONTINENCE
ER_DIABETES	HFQ	INSUTRBL	HAS TROUBLE PAYING OR WAS UNABLE TO PAY FOR INSULIN
ER_DIABETES	HFQ	INSUPEN	ADMINISTRATION MODE OF INSULIN - INSULIN PEN
ER_DIABETES	HFQ	INSUPUM	ADMINISTRATION MODE OF INSULIN - INSULIN PUMP
ER_DIABETES	HFQ	INSUSYR	ADMINISTRATION MODE OF INSULIN - SYRINGE
ER_DIABETES	HFQ	INSUINH	ADMINISTRATION MODE OF INSULIN - INHALER
ER_PREVCARE	HFQ	RECNTBST	WHEN MOST RECENT BLOOD STOOL TEST DONE

Exhibit ER2.2.2 lists variables that changed between the 2023 LDS and 2024 LDS, including variables that moved between segments. See the codebooks for more information on these variables.

Exhibit ER2.2.2: 2024 MCBS Survey File - Early Release LDS Content Changes

Segment	Quex. Section	Variable	Variable Label	Description of Change
ER_ORALHLTH	HFQ	TEETHGUM	GENERAL ORAL HEALTH, TEETH, AND GUMS	Moved from ER_CHRNCOND
ER_ORALHLTH	HFQ	DRYMOUTH	DRY MOUTH (HOW OFTEN)	Moved from ER_CHRNCOND
ER_ORALHLTH	HFQ	TOOTHSEN	TOOTH SENSITIVITY (HOW OFTEN)	Moved from ER_CHRNCOND
ER_ORALHLTH	HFQ	DISTEETH	LOST ALL UPPER AND LOWER TEETH	Moved from ER_NAGIDIS
ER_ORALHLTH	HFQ	FOODTRBL	DIFFICULTY EATING SOLID FOODS B/C TEETH	Moved from ER_NAGIDIS
ER_SATWCARE	SCQ	AGEEQTY	TREATED UNFAIRLY DUE TO AGE	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	CULTEQTY	TREATED UNFAIRLY DUE TO CULTURE OR RELIGION	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	DISEQTY	TREATED UNFAIRLY DUE TO DISABILITY	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	HISTEQTY	TREATED UNFAIRLY DUE TO MEDICAL HISTORY	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	LANGEQTY	TREATED UNFAIRLY DUE TO LANGUAGE OR ACCENT	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	RCEQTY	TREATED UNFAIRLY DUE TO RACE	Added new response option of "No visit in the last 12 months"
ER_SATWCARE	SCQ	SEXEQTY	TREATED UNFAIRLY DUE TO SEXUAL ORIENTATION	Added new response option of "No visit in the last 12 months"

Exhibit ER2.2.3 lists variables that were removed from the 2024 LDS.

Exhibit ER2.2.3: 2024 MCBS Survey File - Early Release LDS Content Removals

Segment	Quex. Section	Variable	Variable Label	Reason for Removal
ER_PREVCARE	HFQ	COLRCNT	WHEN MOST RECENT BLOOD STOOL TEST DONE	Replaced by RECNTBST
ER_DIABETES	HFQ	D_INSPMP	USES INSULIN PUMP	Replaced by INSUPUM

ER3. DATA FILE CONTENTS

ER3.1 2024 MCBS Survey File - Early Release Segments

The 2024 Survey File - Early Release LDS contains over 1,100 variables across 20 segments. Exhibit ER3.1.1 displays each segment in the Survey File - Early Release LDS, including the **segment abbreviation**, **brief description**, and **information on weights or other special notes**.

The **Data Source** column describes the source of the data on the segment. The two possible sources for the Survey File - Early Release LDS are the Community Questionnaire (CQ) and Administrative Records (AR). Each LDS segment can have any combination of these sources. Data source reflects where the data came from, not where the beneficiary was living. For example, a beneficiary could have lived in both settings during the year, but the data for that beneficiary available on the ER_ASSIST segment came from their Community interview only.

The **Quex Section** column lists the specific questionnaire sources for the LDS segment. Please note that not all variables from the questionnaire are released on the segments. Some questionnaire items are combined or recoded to create the LDS variable. Data users will see these derived variables noted in the codebooks preceded with the character "D", such as D_OCDTYP.

Season indicates the round (winter, summer, fall, or all) and year when the questionnaire was administered.

Panel describes whether the questionnaire sections that provide the data for each segment are fielded for Baseline respondents (base), Continuing respondents (cont), or all panels (all). If the segment consists of administrative CMS data, then the cell indicates all panels are included.

Unit of Observation indicates what each row in the segment represents. For example, the ER_ASSIST segment provides multiple rows per BASEID for each person reported as helping the beneficiary in the data year.

Historic RIC Segment indicates the equivalent historic segment(s) from the 1991-2013 data release structure, as applicable.

Exhibit ER3.1.1: 2024 MCBS Survey File - Early Release Segments and Contents

Survey File - Early Release Segment (Abbrev)	Description	Data Collection and Special Weights Notes	Data Source	Quex Section	Season	Panel	Unit of Observation	Historic RIC Segment
Access to Care (ER_ACCESSCR)	Information on ability to obtain health care, delay of care related to costs, and reasons for not obtaining needed health care.		CQ	HFQ	Fall	All	Beneficiary	3

Survey File - Early Release Segment (Abbrev)	Description	Data Collection and Special Weights Notes	Data Source	Quex Section	Season	Panel	Unit of Observation	Historic RIC Segment
Assistance (ER_ASSIST)	Information on the person helping and type of assistance that the beneficiary with ADLs and IADLs.		CQ	ENS, HFQ	All (ENS) Fall (HFQ)	All	Helper by beneficiary	2H
Chronic Conditions (ER_CHRNCOND)	Information on chronic and other diagnosed medical conditions.		CQ	HFQ, PVQ	Fall (HFQ, PVQ) ¹	All	Beneficiary	2, 2P
Cognitive Measures (ER_COGNFUNC)	Measures of cognitive functioning.	Use the special non-response adjustment weights on ER_NPWGTS.	CQ	CMQ	Fall	All	Beneficiary	N/A
Demographics (ER_DEMO)	Select demographic information.		CQ, AR	ENS, DIQ, INQ	All (ENS, INQ) Fall (DIQ)	All (ENS, INQ) Base (DIQ)	Beneficiary	1, 9, A, K
Diabetes (ER_DIABETES)	Information on diabetes management such as insulin usage.		CQ	HFQ	Fall	All	Beneficiary	N/A
Falls (ER_FALLS)	Information on injuries and attitudes about falls.		CQ	HFQ	Fall	All	Beneficiary	2, 2P
General Health (ER_GENHLTH)	Information on general health status and functioning such as height and weight.		CQ	HFQ	Fall	All	Beneficiary	2
Health Insurance Summary (ER_HISUMRY)	Select administrative information on the characteristics of insurance coverage.		AR	n/a	All	All	Beneficiary	4, A
Household Characteristics (ER_HHCHAR)	Information on household composition and home.		CQ	ENS, HAQ	Fall (ENS) Fall (HAQ)	All	Beneficiary	5

Survey File - Early Release Segment (Abbrev)	Description	Data Collection and Special Weights Notes	Data Source	Quex Section	Season	Panel	Unit of Observation	Historic RIC Segment
Mental Health (ER_MENTHLTH)	Information on mental health such as feelings of anxiety or depression.		CQ	HFQ	Fall	All	Beneficiary	N/A
Mobility (ER_MOBILITY)	Information on the use of available transportation options and whether health status affects their daily travel.		CQ	MBQ	Fall	All	Beneficiary	N/A
Nagi Disability (ER_NAGIDIS)	Information on difficulties with the performance of activities of daily living.		CQ	HFQ	Fall	All	Beneficiary	2, 2H, 2P
Nicotine and Alcohol (ER_NICOALCO)	Information on the prevalence and frequency of alcohol and nicotine use.		CQ	NAQ	Fall	All	Beneficiary	2, 2P
Oral Health (ER_ORALHLTH)	Information on oral health.		CQ	HFQ	Fall	All	Beneficiary	N/A
Patient Activation (ER_PNTACT)	Information on the degree to which beneficiaries actively participate in their health care and decisions concerning care.	Use the special non-response adjustment weights on ER_NPWGTS.	CQ	SCQ	Fall	All	Beneficiary	PA
Preventive Care (ER_PREVCARE)	Information on preventive services such routine screening procedures.		CQ	HFQ, PVQ	Fall (HFQ, PVQ) ¹	All	Beneficiary	2, 2P
Satisfaction with Care (ER_SATWCARE)	Information on satisfaction with different aspects of health care.		CQ	SCQ	Fall	Cont. (MPQ, PMQ) All (SCQ)	Beneficiary	3
Vision and Hearing (ER_VISHEAR)	Information on eye health and hearing status.		CQ	HFQ	Fall	All	Beneficiary	2

Survey File - Early Release Segment (Abbrev)	Description	Data Collection and Special Weights Notes	Data Source	Quex Section	Season	Panel	Unit of Observation	Historic RIC Segment
Survey File - Early Release Weight (ER_EVRWGTS)	The weights segment includes general-purpose cross-sectional weights to represent the ever enrolled population and a series of replicate weights.		CQ	n/a	n/a	All	Beneficiary	N/A
Survey File - Early Release Non-Proxy Adjustment Topical Weight (ER_NPWGTS)	The weights segment includes non-proxy adjusted cross-sectional weights to represent the ever enrolled population who did not respond via proxy and a series of replicate weights.		CQ	n/a	n/a	All	Beneficiary	N/A

1. PVQ is administered in rounds following the current data year given that the reference period is the prior year and data are included in the prior year data files. Fall round PVQ data are released on the Survey File - Early Release LDS, while winter and summer round PVQ data are released on the Survey File LDS.

ER3.2 Imputation

There are no imputation notes for the Survey File - Early Release LDS as the LDS does not include any imputed data.

ER3.3 Weights

The Survey File - Early Release cross-sectional weights represent the ever enrolled population of inference. This weight is greater than zero for all beneficiaries in the Survey File - Early Release. This weight segment is ER_EVRWGTS, and the name of the weight is ER_EEYRSWGT. The sum of this weight represents the population of beneficiaries who were entitled and enrolled in Medicare for at least one day at any time during the calendar year and still alive, enrolled, and living in the community in fall 2024.

ER3.3.1 Special Topical Segment Weights

The 2024 Survey File - Early Release LDS includes two segments that should be used with special non-response adjusted weights: ER_PNTACT and ER_COGNFUNC. ER_PNTACT and ER_COGNFUNC include items that were fielded in Fall 2024 to only non-proxy respondents (i.e., beneficiary respondents). On the Survey File - Early Release LDS, ER_PNTACT and ER_COGNFUNC require use of the set of full-sample and replicate

weights that have been adjusted to account for those completing the interview with a proxy respondent (ER_NPWGTS; ER_NPSEWT/ER_NPSE1-ER_NPSE100). These weights correspond to the Survey File - Early Release ever enrolled population who were alive and living in the community in fall 2024, but exclude those with proxy interviews, and can be used to conduct analyses of the Topical data as representing the ever enrolled population and in conjunction with other Survey File - Early Release data.

Exhibit ER3.3.1 summarizes all weights released on the 2024 Survey File - Early Release.

Exhibit ER3.3.1: 2024 MCBS Survey File - Early Release Summary of Weights

Limited Data Set	Description	Segment	Full-Sample Weight	Replicate Weights	Population
Survey File - Early Release	Ever Enrolled Cross-Sectional Weights	ER_EVRWGTS	ER_EEYRSWGT	ER_EEYRS1-ER_EEYRS100	Ever enrolled for at least one day at any time during 2024
Survey File - Early Release Topical Segment	Survey File - Early Release Non-Proxy Adjustment Ever Enrolled Weights	ER_NPWGTS	ER_NPSEWT	ER_NPSE1-ER_NPSE100	Ever enrolled for at least one day at any time during 2024; includes Fall non-proxy adjustment

ER3.4 Special Notes

Beginning with the 2024 Survey File - Early Release LDS, the non-proxy adjustment Topical weights are included on a standalone weights segment (ER_NPWGTS) for use with the ER_COGNFUNC and ER_PNTACT segments, instead of being included directly on those Topical segments.

Several variables underwent changes to their editing processes for the 2024 LDS. As such, users should use caution if comparing these variables over time:

- On ER_PREVCARE, COLDRREC (doctor ever recommended colonoscopy) was updated to pull forward beneficiary responses to the question from prior rounds.
- On ER_DIABETES, the following four variables on foot problems due to diabetes are now set to missing if the response to DIAFTEVR (ever had a problem with feet due to diabetes) is "No" (per the questionnaire skip logic for these items):
 - ▶ DIACIRCF: Ever had poor circulation in feet due to diabetes
 - ▶ DIANEURO: Ever had neuropathy due to diabetes
 - ▶ DIASKINC: Ever had foot skin problems due to diabetes
 - ▶ DIAULCER: Ever had foot ulcers due to diabetes

Please also note, CONTGLUC (uses continuous glucose monitor) was added to HFQ in 2023 and is not asked of beneficiaries who had previously completed the diabetes section of HFQ.