

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
			INCOME AND ASSETS QUESTIONNAIRE SPECIFICATIONS <u>CRITERIA</u> INTTYPE=C001, C002, C004, C005, C006, C010 SPALIVE=ALL SEASON=SUMMER SPPROXY=SP or PROXY Other: N/A <u>PLACEMENT</u> Administer after CPQ.		
LFINTRO1	LFINTRO1	no entry	Now I have some questions about income and other financial resources. We know that people aren't used to talking about their assets, but we ask these questions to get an overall picture of people enrolled in Medicare - NOT to find out about [you/(SP)] [and [your/(SP)'s] (spouse)] personally. As with all information collected by the MCBS, the data are confidential and covered by the Privacy Act of 1974, and [your/(SP)'s] Medicare benefits will not be affected in any way by answering these questions. GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY.	(01) CONTINUE (-7) Empty	BOX LFINTRO1
	BOX LFINTRO1	routing	If SPASTATUS = 3 (Deceased in Community) or 4 (Deceased in institution), go to IAQ50 - TOTLCMB1. Otherwise, go to LIFINTRO2 - LFINTRO2.		
LFINTRO2	LFINTRO2	no entry	As the brochure explains, your responses to these questions can help us determine the impact of income on [your/(SP)'s] use and access to health care. First, I will ask whether [you/(SP)]/you and your spouse/(SP) and their spouse] had particular types of income or other financial resources. Then, I will ask you to estimate [your/(SP)'s]/their] total income. [Please answer all questions for [you and your spouse/(SP) and their spouse]. Please feel free to refer to any records or other persons who may be of assistance to you.	(01) CONTINUE (-7) Empty	LF3- WORKMNTH
WORKMNTH	LF3	code one	Now think about last month, that is [CURRENT MONTH-1]. Did [you/(SP)] do any work for pay at any time in the last month?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	(01) WEKLYHRS (02) BOX LF13 (-8) BOX LF13 (-9) BOX LF13
WEKLYHRS	WEKLYHRS	quantity unit	How many hours per week did [you/(SP)] usually work at [your/(SP)'s] job(s)? ENTER NUMBER OF HOURS USUALLY WORKED. IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	MONTHLYP-MONTHLYP
MONTHLYP	MONTHLYP	quantity unit	In [CURRENT MONTH -1], how much altogether did [you/(SP)] earn from any work [you/they] did in [CURRENT MONTH -1], before taxes and before any other deductions? [IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.] ENTER DOLLAR AMOUNT \$	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX LF13 (-8) EARNSPRG (-9) EARNSPRG

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EARNSPRG	EARNSPRG	code one	SHOW CARD IA1 Please look at this card and tell me which is closest.	(01) LESS THAN \$500 (02) \$500 TO LESS THAN \$1000 (03) \$1000 TO LESS THAN \$2000 (04) \$2000 TO LESS THAN \$3000 (05) \$3000 TO LESS THAN \$5000 (06) \$5000 OR MORE	BOX LF13
	BOX LF13	routing	If the SP has a spouse who is living in the household (ROSTREL=2, HHFLAG=1), go to LF13-SPOUSWRK. Otherwise, go to HO1-OWNHOME.		
SPOUSWRK	LF13	code one	Did [you/(your/(SP)'s) (spouse)] do any work for pay in the month of [CURRENT MONTH-1]?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	(01) LF14-SPOUSERN (02) HO1-OWNHOME (-8) HO1-OWNHOME (-9) HO1-OWNHOME
SPOUSERN	LF14	quantity unit	In [CURRENT MONTH -1], how much altogether did [you/your/(SP)'s] [spouse] earn before taxes and before any other deductions? [IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.] ENTER DOLLAR AMOUNT \$	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) HO1-OWNHOME (-8) SPOUSERG (-9) SPOUSERG
SPOUSERG	SPOUSERG	code one	SHOW CARD IA1 Please look at this card and tell me which is closest.	(01) LESS THAN \$500 (02) \$500 TO LESS THAN \$1000 (03) \$1000 TO LESS THAN \$2000 (04) \$2000 TO LESS THAN \$3000 (05) \$3000 TO LESS THAN \$5000 (06) \$5000 OR MORE	HO1-OWNHOME
OWNHOME	HO1	code one	Next, I'd like to ask you some questions about the [home/apartment or condo] that is [your/(SP)'s] main residence. [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] own the [home/apartment or condo], rent it, or is there some other arrangement?	(01) OWN (02) RENT (OR PAY MONTHLY AMOUNT) (03) SOME OTHER ARRANGEMENT (-8) DON'T KNOW (-9) REFUSED	(01) HO2-MORTGAGE (02) HO6-RENTAMT1 (03) HO5-PAYRENT (-8) HO5-PAYRENT (-9) HO5-PAYRENT
MORTGAGE	HO2	code one	Is [your/(SP)'s] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] mortgage paid off or are monthly mortgage payments still being made? [IF NEEDED: Include any payments on a home equity loan or second mortgage.]	(01) PAID OFF (02) STILL MAKE PAYMENTS (03) REVERSE MORTGAGE (-8) DON'T KNOW (-9) REFUSED	(01) HO4-PRSNVTLU (02) HO3-MRTGAMT (03) MORREVER (-8) HO4-PRSNVTLU (-9) HO4-PRSNVTLU
MRTGAMT	HO3	quantity unit	How much altogether is that each month? ENTER DOLLAR AMOUNT	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) MORREVER (-8) HO3A-MRTGAMRG (-9) HO3A-MRTGAMRG

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MRTGAMRG	HO3A	code one	<p>SHOW CARD IA2</p> <p>Please look at this card and tell me which is closest.</p> <p>[IF NEEDED: Include any payments on a home equity loan or second mortgage.]</p>	<p>(01) LESS THAN \$250 (02) \$250 TO LESS THAN \$500 (03) \$500 TO LESS THAN \$1,000 (04) \$1,000 TO LESS THAN \$3,000 (05) \$3,000 TO LESS THAN \$5,000 (06) \$5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	MORREVER
MORREVER	MORREVER	quantity unit	<p>About how much [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] still owe on the mortgage?</p> <p>[IF NEEDED: The nearest \$10,000 is fine.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p> <p>[IF NEEDED: Include the principal owed on a home equity loan or second mortgage.]</p> <p>IF THE HOUSEHOLD HAS A REVERSE MORTGAGE OR A HOME EQUITY LOAN, THE PRINCIPAL OWED IS THE TOTAL AMOUNT RECEIVED TO DATE.</p> <p>ENTER DOLLAR AMOUNT</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) HO4-PRSNVTLU (-8) MORTGOWE (-9) MORTGOWE</p>
MORTGOWE	MORTGOWE	code one	<p>Is the amount owed...</p>	<p>(01) less than \$50,000, (02) \$50,000 to less than \$100,000, or (03) \$100,000 or more? (-8) DON'T KNOW (-9) REFUSED</p>	HO4-PRSNVTLU
PRSNVTLU	HO4	quantity unit	<p>What is the present value of this [home/apartment or condo]? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?</p> <p>[IF NEEDED: Your best guess or the nearest \$10,000 is fine.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p> <p>ENTER DOLLAR AMOUNT</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) IAQINTRO1 (-8) HO4A-PRTVLURG (-9) HO4A-PRTVLURG</p>
PRTVLURG	HO4A	code one	<p>SHOW CARD IA3</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$50,000 (02) \$50,000 TO LESS THAN \$75,000 (03) \$75,000 TO LESS THAN \$100,000 (04) \$100,000 TO LESS THAN \$200,000 (05) \$200,000 TO LESS THAN \$300,000 (06) \$300,000 TO LESS THAN \$500,000 (07) \$500,000 TO LESS THAN \$750,000 (08) \$750,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	IAQINTRO1
PAYRENT	HO5	yes/no	<p>[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] pay rent to live here?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) HO6-RENTAMT1 (02) IAQINTRO1 (-8) IAQINTRO1 (-9) IAQINTRO1</p>

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RENTAMT1	HO6	quantity unit	How much is that each month? ENTER DOLLAR AMOUNT	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) IAQINTRO1 (-8) HO6A-RENTAMT2 (-9) HO6A-RENTAMT2
RENTAMT2	HO6A	code one	SHOW CARD IA2 Please look at this card and tell me which is closest.	(01) LESS THAN \$250 (02) \$250 TO LESS THAN \$500 (03) \$500 TO LESS THAN \$1,000 (04) \$1,000 TO LESS THAN \$3,000 (05) \$3,000 TO LESS THAN \$5,000 (06) \$5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	IAQINTRO1
IAQINTRO1	IAQINTRO1	no entry	The next few questions are about income and other resources. Your responses can help us understand how people manage financially in your community. Please feel free to refer to any records or other persons that may be of assistance in answering these questions. Many of these questions ask about "last month." By last month, I mean in [CURRENT MONTH – 1].		SSRRLMTH
SSRRLMTH	IAQ1	code one	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] receive Social Security retirement and/or Railroad Retirement payments in the <u>last month</u> , that is in [CURRENT MONTH –1]? [IF NEEDED: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes.]	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	IAQ4 -SSILMTH
SSILMTH	IAQ4	code one	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] receive Supplemental Security Income, which is also called SSI, <u>last month</u> ? [IF NEEDED: These are monthly government payments to lower-income people in need.]	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	IAQ5-VALMTH
VALMTH	IAQ5	code one	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] receive any payments from the Veteran's Administration <u>last month</u> related to military service or veteran survivor's benefits? [IF NEEDED: The Veteran's Administration is also known as the U.S. Department of Veterans Affairs.]	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	IAQ6-PENSLMTH
PENSLMTH	IAQ6	code one	People sometimes receive retirement income from other sources, such as pensions. [Did you/Did (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME)] receive income from any pension plans that were a job-related or union benefit <u>last month</u> ? [IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan.]	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	IAQ7-LMTH401K

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LMTH401K	IAQ7	code one	<p>SHOW CARD IA4</p> <p>These next questions ask about assets [you/(SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME)] might own or contribute to, such as retirement plans, mutual funds, and bonds.</p> <p>Please look at the types of retirement plans on this card. [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME)] have any of these?</p> <p>[IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution.]</p> <p>[IF NEEDED: IRAs, also known as Individual Retirement Accounts, are a type of plan you set up on your own.]</p> <p>[IF NEEDED: A Keogh plan is a retirement plan for self-employed individuals or unincorporated small businesses.]</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	IAQ9-BONDS
BONDS	IAQ9	code one	<p>Not including what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	IAQ10-CHECKING
CHECKING	IAQ10	code one	<p>The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own.</p> <p>Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] have...</p> <p>A checking account?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	IAQ11-SAVINGS
SAVINGS	IAQ11	code one	<p>[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] have...]</p> <p>A savings account or money market account?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	IAQ12-CERTDEPT
CERTDEPT	IAQ12	code one	<p>[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] have...]</p> <p>Certificates of deposit or CDs?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	IAQ8-MULFUNDS
MULFUNDS	IAQ8	code one	<p>[(Not including the retirement accounts we have already talked about, {do you/does (SP)})/(Do you/Does (SP))] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] own any mutual funds or stocks?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	OTH_INVNT
OTH_INVNT	OTH_INVNT	code one	<p>[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] own any other financial investments? Examples include a business, a farm, real estate [other than [your/(SP)'s home], motorcycles, boats, and RV's?</p> <p>DO NOT INCLUDE BURIAL PLOTS.</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	LUMP
LUMP	IAQ52	code one	<p>People sometimes receive large amounts of money or property in the form of an inheritance, a trust fund, an insurance settlement, and so on.</p> <p>Now thinking about last year, that is, the calendar year ending in December [CURRENT YEAR - 1], [have you/has (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] received money or property in the form of an inheritance, a trust fund, an insurance settlement, a pension settlement, a gift, or a lawsuit?</p>	<p>(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED</p>	NUMCAR

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
NUMCAR	CO2	quantity unit	How many vehicles [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] own? ENTER NUMBER OF VEHICLES [IF NEEDED: Do not include leased cars.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	IAQINTRO2
IAQINTRO2	IAQINTRO2	no entry	We now have a few questions about income which are important for understanding how people manage financially= in your community. We want to be both as accurate and efficient as we can, so it would be very helpful if you could refer to any records you might have.		BOX IAQ2
	BOX IAQ2	routing	If IAQ1-SSRRLMTH = 1/YES, go to SSRR_AMT. Otherwise, go to BOX IAQ3.		
SSRR_AMT	SSRR_AMT	quantity unit	First, what was the total amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)]'s most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH - 1])? [IF NEEDED: We don't need an exact dollar amount.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ3 (-8) SSRR_SPA (-9) SSRR_SPA
SSRR_SPA	SSRR_SPA	code one	SHOW CARD IA5 Please look at this card and tell me which is closest.	(01) LESS THAN \$1,000 (02) \$1,000 TO LESS THAN \$1,500 (03) \$1,500 TO LESS THAN \$2,000 (04) \$2,000 TO LESS THAN \$3,000 (05) \$3,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ3
	BOX IAQ3	routing	If IAQ4-SSILMTH = 1/YES, go to SSI_AMT. Otherwise, go to BOX IAQ4.		
SSI_AMT	SSI_AMT	quantity unit	What was the total amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)]'s most recent monthly SSI payment (for the month of [CURRENT MONTH - 1])? [IF NEEDED: We don't need an exact dollar amount.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ4 (-8) BOX SSIRANGE (-9) BOX SSIRANGE
	BOX SSIRANGE	routing	IF SP HAS A SPOUSE WHO IS ALIVE AND LIVING IN THE HOUSEHOLD (ROSTREL=2, HHFLAG=1), GO TO SSI_HHA. ELSE GO TO SSI_SPA.		

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SSI_HHA	SSI_HHA	code one	SHOW CARD IA6 Please look at this card and tell me which is closest.	(01) LESS THAN \$400 (02) \$400 TO LESS THAN \$800 (03) \$800 TO LESS THAN \$1,200 (04) \$1,200 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ4
SSI_SPA	SSI_SPA	code one	SHOW CARD IA7 Please look at this card and tell me which is closest.	(01) LESS THAN \$300 (02) \$300 TO LESS THAN \$600 (03) \$600 TO LESS THAN \$900 (04) \$900 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ4
	BOX IAQ4	routing	If IAQ5-VALMTH = 1/YES, go to VA_AMT. Otherwise, go to BOX IAQ5.		
VA_AMT	VA_AMT	quantity unit	What was the total amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)]'s most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH - 1])? [IF NEEDED: We don't need an exact dollar amount.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ5 (-8) BOX VARANGE (-9) BOX VARANGE
	BOX VARANGE	routing	IF SP HAS A SPOUSE WHO IS ALIVE AND LIVING IN THE HOUSEHOLD (ROSTREL=2, HHFLAG=1), GO TO VA_HHA, ELSE GO TO VA_SPA.		
VA_HHA	VA_HHA	code one	SHOW CARD IA8 Please look at this card and tell me which is closest.	(01) LESS THAN \$1,000 (02) \$1,000 TO LESS THAN \$2,000 (03) \$2,000 TO LESS THAN \$3,000 (04) \$3,000 TO LESS THAN \$4,000 (05) \$4,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ5
VA_SPA	VA_SPA	code one	SHOW CARD IA9 Please look at this card and tell me which is closest.	(01) LESS THAN \$500 (02) \$500 TO LESS THAN \$1,500 (03) \$1,500 TO LESS THAN \$2,500 (04) \$2,500 TO LESS THAN \$3,500 (05) \$3,500 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ5
	BOX IAQ5	routing	If IAQ6-PENSLMTH = 1/YES, go to PEN_AMT. Otherwise, go to BOX IAQ6.		

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PEN_AMT	PEN_AMT	quantity unit	<p>You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] job-related pension plans. In total, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of [CURRENT MONTH – 1])?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ6 (-8) PEN_SPA (-9) PEN_SPA</p>
PEN_SPA	PEN_SPA	code one	<p>SHOW CARD IA10</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$500 (02) \$500 TO LESS THAN \$1,500 (03) \$1,500 TO LESS THAN \$2,500 (04) \$2,500 TO LESS THAN \$4,000 (05) \$4,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ6
	BOX IAQ6	routing	<p>If IAQ7-LMTH401K = 1/YES, go to AMT_401K Otherwise, go to BOX IAQ9C.</p>		
AMT_401K	AMT_401K	quantity unit	<p>You mentioned that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] retirement accounts. In total, about how much is <u>currently</u> in all of these retirement accounts?</p> <p>[IF NEEDED: Retirement accounts include 401K, 403B, IRA, Keogh plans, and other retirement accounts.]</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) YREC_AMT (-8) SPA_401K (-9) SPA_401K</p>
SPA_401K	SPA_401K	code one	<p>SHOW CARD IA11</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$50,000 (02) \$50,000 TO LESS THAN \$200,000 (03) \$200,000 TO LESS THAN \$500,000 (04) \$500,000 TO LESS THAN \$1,000,000 (05) \$1,000,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	YREC_AMT
YREC_AMT	YREC_AMT	quantity unit	<p>Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], in total, how much did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] receive or withdraw from all of these retirement accounts?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ9C (-8) YREC_SPA (-9) YREC_SPA</p>
YREC_SPA	YREC_SPA	code one	<p>SHOW CARD IA12</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$5,000 (02) \$5,000 TO LESS THAN \$10,000 (03) \$10,000 TO LESS THAN \$20,000 (04) \$20,000 TO LESS THAN \$50,000 (05) \$50,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ9C

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	BOX IAQ9C	routing	If IAQ9-BONDS=1/YES, go to BNDS_AMT. Otherwise, go to BOX IAQ10.		
BNDS_AMT	BNDS_AMT	quantity unit	<p>You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [own/owns] government, corporate, or other bonds that are not part of retirement accounts. In total, about how much are these worth?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ10 (-8) BNDS_SPA (-9) BNDS_SPA</p>
BNDS_SPA	BNDS_SPA	code one	<p>SHOW CARD IA13</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$500 (02) \$500 TO LESS THAN \$2,500 (03) \$2,500 TO LESS THAN \$10,000 (04) \$10,000 TO LESS THAN \$50,000 (05) \$50,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ10
	BOX IAQ10	routing	If IAQ10-CHECKING = 1/YES, go to CHCK_AMT. Otherwise, go to BOX IAQ10A.		
CHCK_AMT	CHCK_AMT	quantity unit	<p>You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] a checking account.</p> <p>In total, about how much is currently in your checking account(s)?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ10A (-8) CHCK_SPA (-9) CHCK_SPA</p>
CHCK_SPA	CHCK_SPA	code one	<p>SHOW CARD IA14</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$1,000 (02) \$1,000 TO LESS THAN \$2,500 (03) \$2,500 TO LESS THAN \$5,000 (04) \$5,000 TO LESS THAN \$7,500 (05) \$7,500 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ10A
	BOX IAQ10A	routing	If IAQ11-SAVINGS=1/YES, go to SVGS_AMT. Otherwise, go to BOX IAQ10B.		
SVGS_AMT	SVGS_AMT	quantity unit	<p>You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] savings or money market accounts.</p> <p>In total, about how much is currently in your savings or money market accounts?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ10B (-8) SVGS_SPA (-9) SVGS_SPA</p>

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
SVGS_SPA	SVGS_SPA	code one	SHOW CARD IA15 Please look at this card and tell me which is closest.	(01) LESS THAN \$2,000 (02) \$2,000 TO LESS THAN \$4,000 (03) \$4,000 TO LESS THAN \$7,500 (04) \$7,500 TO LESS THAN \$15,000 (05) \$15,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ10B
	BOX IAQ10B	routing	If IAQ12-CERTDEPT = 1/YES, go to CD_AMT. Otherwise, go to BOX IAQ10C.		
CD_AMT	CD_AMT	quantity unit	You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] certificates of deposits or CDs. In total, about how much are these certificates of deposits or CDs currently worth? [IF NEEDED: We don't need an exact dollar amount.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ10C (-8) CD_SPA (-9) CD_SPA
CD_SPA	CD_SPA	code one	SHOW CARD IA16 Please look at this card and tell me which is closest.	(01) LESS THAN \$5,000 (02) \$5,000 TO LESS THAN \$15,000 (03) \$15,000 TO LESS THAN \$30,000 (04) \$30,000 TO LESS THAN \$50,000 (05) \$50,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ10C
	BOX IAQ10C	routing	If IAQ8-MULFUNDS = 1/YES, go to MF_AMT. Otherwise, go to BOX IAQ11.		
MF_AMT	MF_AMT	quantity unit	You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE)] [own/owns] mutual funds or stocks that are not part of retirement accounts. In total, about how much are these worth? [IF NEEDED: We don't need an exact dollar amount.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ11 (-8) MF_SPA (-9) MF_SPA
MF_SPA	MF_SPA	code one	SHOW CARD IA17 Please look at this card and tell me which is closest.	(01) LESS THAN \$10,000 (02) \$10,000 TO LESS THAN \$50,000 (03) \$50,000 TO LESS THAN \$150,000 (04) \$150,000 TO LESS THAN \$500,000 (05) \$500,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ11
	BOX IAQ11	routing	If IAQ8-MULFUNDS = 1/YES or IAQ9-BONDS = 1/YES or IAQ10-CHECKING = 1/YES or IAQ11-SAVINGS = 1/YES or IAQ12-CERTDEPT = 1/YES, go to INT_AMT. Otherwise, go to BOX IAQ12.		

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
INT_AMT	INT_AMT	quantity unit	<p>Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], in total, how much interest and dividend income did [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] have from [mutual funds or stocks] [government, corporate, or other bonds] [bank accounts or CDs]?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ12 (-8) INT_SPA (-9) INT_SPA</p>
INT_SPA	INT_SPA	code one	<p>SHOW CARD IA18</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$25 (02) \$25 TO LESS THAN \$200 (03) \$200 TO LESS THAN \$2,000 (04) \$2,000 TO LESS THAN \$10,000 (05) \$10,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ12
	BOX IAQ12	routing	<p>If OTH_INVNT = 1/YES, go to OTH_VLU. Otherwise, go to BOX IAQ13.</p>		
OTH_VLU	OTH_VLU	quantity unit	<p>You told me earlier that [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] [have/has] other financial investments, such as a business, a farm, real estate [other than [your/(SP)'s] home], motorcycles, boats, and RV's. If these investments were sold today and any debts on them were paid off, in total, about how much would they bring?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) BOX IAQ13 (-8) OTH_SPA (-9) OTH_SPA</p>
OTH_SPA	OTH_SPA	code one	<p>SHOW CARD IA19</p> <p>Please look at this card and tell me which is closest.</p>	<p>(01) LESS THAN \$50,000 (02) \$50,000 TO LESS THAN \$150,000 (03) \$150,000 TO LESS THAN \$300,000 (04) \$300,000 TO LESS THAN \$750,000 (05) \$750,000 OR MORE (-8) DON'T KNOW (-9) REFUSED</p>	BOX IAQ13
	BOX IAQ13	routing	<p>If OTH_INVNT = 1/YES, go to INVT_NCM. Otherwise, go to IAQ50.</p>		
INVT_NCM	INVT_NCM	quantity unit	<p>Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], in total, how much income did [you/(SP)] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] receive from these other investments before any federal or state taxes were taken out?</p> <p>[IF NEEDED: We don't need an exact dollar amount.]</p> <p>[IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.]</p> <p>IF NO INCOME WAS RECEIVED FROM THESE OTHER INVESTMENTS, ENTER 0.</p>	<p>(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED</p>	<p>(01) IAQ50 (-8) NCM_SPA (-9) NCM_SPA</p>

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
NCM_SPA	NCM_SPA	code one	SHOW CARD IA20 Please look at this card and tell me which is closest.	(01) LESS THAN \$7,500 (02) \$7,500 TO LESS THAN \$15,000 (03) \$15,000 TO LESS THAN \$25,000 (04) \$25,000 TO LESS THAN \$75,000 (05) \$75,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	IAQ50-TOTLCMB1
TOTLCMB1	IAQ50	quantity unit	Now I want to ask about [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] total income for <u>last year</u> , that is, for the calendar year ending in December [CURRENT YEAR - 1], before any federal or state taxes were taken out. Now think about that total income from: [Social Security or Railroad Retirement] [Supplemental Security Income] [the Veteran's Administration] [a pension plan] [any retirement accounts] [mutual funds or stocks] [bonds] [bank accounts] [CDs] [any other financial investments] [jobs] and from any other sources. How much was [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)] total income before taxes for last year (this is, for the 12 months ending in December [CURRENT YEAR - 1])? [IF NEEDED: We don't need an exact dollar amount – the nearest \$1,000 is fine.] [IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially in your community and what effect this might have on their health.] ENTER TOTAL INCOME FOR LAST YEAR.	(01) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(01) BOX IAQ15 (-8) TOTLCMRG (-9) TOTLCMRG
TOTLCMRG	IAQ51B	code one	SHOW CARD IA21 Please look at this card and tell me which is closest.	(01)A. LESS THAN \$10,000 (02)B. \$10,000 TO LESS THAN \$15,000 (03)C. \$15,000 TO LESS THAN \$20,000 (04)D. \$20,000 TO LESS THAN \$25,000 (05)E. \$25,000 TO LESS THAN \$35,000 (06)F. \$35,000 TO LESS THAN \$45,000 (07)G. \$45,000 TO LESS THAN \$55,000 (08)H. \$55,000 TO LESS THAN \$70,000 (09)I. \$70,000 TO LESS THAN \$100,000 (10)J. \$100,000 TO LESS THAN \$150,000 (11)K. \$150,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	BOX IAQ15
	BOX IAQ15	routing	If SPASTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. ELSE, go to FSINTRO1.		
FSINTRO1	FSINTRO1	no entry	These next questions are about the food eaten in [your/(SP)'s] household in the last 12 months, since [current month] of last year and whether [you were/(SP)] able to afford the food [you need/they need].		FS1
FOODLAST	FS1	code one	I'm going to read you some statements that people have made about their food situation. For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months—that is, since last [current month]. The first statement is, The food that [I/we/(SP)/(SP) or other adults in (SP)'s household] bought just didn't last, and [I/they] didn't have money to get more. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months?	(01) OFTEN TRUE (02) SOMETIMES TRUE (03) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	FS2

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
FOODLAST_OFTEN	FS2	code one	The next statement is: [/we/(SP)/(SP) or other adults in (SP)'s household] couldn't afford to eat balanced meals. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? [IF NEEDED: For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months—that is, since last [current month].]	(01) OFTEN TRUE (02) SOMETIMES TRUE (03) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	FS3
SKIPMEAL	FS3	code one	In the last 12 months, since last (name of current month), did [you/you or other adults in your household/(SP)/(SP) or other adults in (SP)'s household] ever cut the size of [your/(SP's)/their] meals or skip meals because there wasn't enough money for food?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	(01) FS3A (02) FS4 (-8) FS4 (-9) FS4
SKIPMEAL_OFTEN	FS3A	code one	How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months?	(01) ALMOST EVERY MONTH (02) SOME MONTHS BUT NOT EVERY MONTH (03) IN ONLY 1 OR 2 MONTHS (-8) DON'T KNOW (-9) REFUSED	FS4
EATLESS	FS4	code one	In the last 12 months, did [you/(SP)] ever eat less than [you/they] felt [you/they] should because there wasn't enough money for food?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	FS5
HUNGRY	FS5	code one	In the last 12 months, [were you/was (SP)] ever hungry but didn't eat because there wasn't enough money for food?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	PGMINTRO
PGMINTRO	PGMINTRO	no entry	We now have a few questions about programs that may be available to either [you or members of your household/(SP) or members of (SP)'s household] to help pay for food, housing, or healthcare costs. Some of these questions will ask you to consider [your and your household's/(SP) and their household's] participation, while others will ask exclusively about [YOUR/(SP)'s] participation.	(01) CONTINUE	SNAPBNFT
SNAPBNFT	SNAPBNFT	code one	In the last 12 months, did [you/you or any member in the household/(SP)/(SP) or any member in (SP)'s household] receive benefits from the Food Stamp Program or SNAP (the Supplemental Nutrition Assistance Program) [also called (STATE SNAP PROGRAM NAME)]? DO NOT INCLUDE THE WOMEN, INFANTS, AND CHILDREN (WIC) SUPPLEMENTAL NUTRITION PROGRAM, THE SCHOOL LUNCH PROGRAM, OR ANY ASSISTANCE FROM FOOD BANKS OR FOOD PANTRIES.	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	BOX HO1
	BOX HO1	routing	If HO6>=\$750 or HO6A=4 (\$1,000 TO LESS THAN \$3,000), 5 (\$3,000 TO LESS THAN \$5,000), OR 6 (\$5,000 OR MORE) go to ENRGYHLP. ELSE, go to HO7-SECTION8.		
SECTION8	HO7	yes/no	This next question asks about [your/(SP's)] home and affordable housing programs. Is [your/(SP's)] home in Section 8 or public housing or housing for low-income seniors?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	ENRGYHLP

Variable Name	MR Screen Name	Question Type	Question Text/Description	Code List	Routing
ENRGYHLP	ENRGYHLP	yes/no	The government has an energy assistance program which helps pay heating and cooling costs. This assistance can be received directly by the household or it can be paid directly to the electric company, gas company, or fuel dealer. In [CURRENT YEAR - 1], did [you/this household/(SP's) household] receive assistance of this type from the federal, state, or local government?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	LISKNOW
LISKNOW	LISKNOW	yes/no	As you may know, the government has programs that help beneficiaries pay for the costs associated with a Medicare drug plan and the purchase of prescription drugs. The help provided is referred to as a "Low-Income Subsidy" or "Extra Help". Before today, were you aware that Medicare offers a Low-Income Subsidy or Extra Help with prescription drug coverage?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	(01) PDRECLIS (02) MSPKNOW (-8) MSPKNOW (-9) MSPKNOW
PDRECLIS	RXPD18B	yes/no	[Are you/Is (SP)] receiving this type of help to pay for [your/(SP's)] (CURRENT YEAR) Medicare prescription drug coverage? [EXPLAIN IF NECESSARY: Beneficiaries who qualify for these programs receive help paying for the Medicare drug plan's monthly premium, help paying any yearly deductible, help paying coinsurance and copayments for prescription drugs, and have no coverage gap.]	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	MSPKNOW
MSPKNOW	MSPKNOW	yes/no	As you may know, the government has a set of programs, called Medicare Savings Programs (MSP), that help beneficiaries pay for the costs associated with Medicare, such as Part A (Hospital Insurance) or Part B (Medical Insurance) premiums, deductibles, coinsurance, and copayments. Unlike additional insurance plans that require a monthly premium, Medicare Savings Programs provide financial help at no cost to eligible beneficiaries who have limited income and resources. Before today, were you aware that Medicare offers these programs?	(01) YES (02) NO (-8) DON'T KNOW (-9) REFUSED	(01) USEMSP (02) BOX ENDIAQ (-8) BOX ENDIAQ (-9) BOX ENDIAQ
USEMSP	USEMSP	yes/no	[Are you/Is (SP)] receiving any assistance from a Medicare Savings Program (MSP) to help pay for [your/(SP's)] (CURRENT YEAR) health care costs? [EXPLAIN IF NECESSARY: Medicare Savings Programs pay for remaining costs (premiums, deductibles, coinsurance, and copayments) not covered by Medicare. These programs are different from additional insurance plans, such as Medicare Supplement Insurance (Medigap) or private insurance plans, in that beneficiaries will not pay for this extra financial help. Instead, beneficiaries must be eligible (i.e., have limited resources or income) and some may need to apply to receive this financial assistance from an MSP.]	(01) YES (02) NO (-8) Don't Know (-9) Refused	BOX ENDIAQ
	BOX ENDIAQ	routing	GO TO DBQ.		