

HEALTH AND RETIREMENT STUDY
2020 Core
Early, Version 2.0
August 2022

Data Description and Usage

Conditions of Use

By registering for access to HRS Public Release data, the User agrees to all of the following:

- Make no attempts to identify study participants.
- Not to transfer HRS Public Release data to any third party other than staff or students for whom you are directly responsible except as indicated below.
- Not to allow others to use your username and password to access this site.
- To certify the destruction of any downloaded Public Release data file as well as any data files derived from the downloaded file when requested to do so by the Health and Retirement Study.
- To include the following citation in any research reports, papers, or publications based on Public Release data:

In text:

"The HRS (Health and Retirement Study) is sponsored by the National Institute on Aging (grant number NIA U01AG009740) and is conducted by the University of Michigan."

In references:

"Health and Retirement Study, 2020 HRS Early Core public use dataset. Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA U01AG009740). Ann Arbor, MI, (year)."

- To include the following citation in any research reports, papers, or publications based on any Public Release data file tagged as "Early" or "Preliminary":

"This analysis uses Early Release data from the Health and Retirement Study, 2020 HRS Early Core, sponsored by the National Institute on Aging (grant number NIA U01AG009740) and conducted by the University of Michigan. These data have not been cleaned and may contain errors that will be corrected in the Final Public Release version of the dataset."

- Please note that although it is necessary to include the above citations to the HRS in any publications, it is not necessary to associate your publications with the HRS grant in [PubMed](#).
- Provide information regarding any research product (dissertation, thesis, journal article, book, book chapter, report, etc.) based on data obtained from the Health and Retirement Study by sending an electronic copy to hrspublications@umich.edu.
- Report immediately to the Health and Retirement Study at hrsquestions@umich.edu any disclosure of study participant identity as well as any discovery of flaws or errors in the data or documentation files.
- Notify the Health and Retirement Study through use of the update function provided at this site or by electronic mail directed to hrsquestions@umich.edu of changes in your electronic mail address, postal address, telephone number, organizational affiliation or organizational status.

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Data Description and Usage

1. Overview

The 2020 HRS Core (Early, Version 2.0) data release consists of data obtained as part of the Health and Retirement Study (HRS), a national longitudinal study of the economic, health, marital, and family status, as well as public and private support systems, of older Americans. The National Institute on Aging provided funding (NIA U01 AG009740), with supplemental support from the Social Security Administration. The Institute for Social Research (ISR) Survey Research Center (SRC) at the University of Michigan conducted the survey.

By receiving the data, which have been freely provided, you agree to use them for research and statistical purposes only and to make no effort to identify the respondents. In addition, you agree to send us a copy of any publications you produce based on the data. See [Obtaining the Data](#) for additional details.

1A. Changes to 2020 Early Core Data

In version 2, we added:

- scoring for most web cognition variables
- vocabulary data (RD161, RD163, RD165, RD167, RD169)
- OPN substitutions for children or household members that were newly reported in 2020 but not previously coded in version 1
- variables that report occupation and industry information
- new data based on coding done for respondents who completed the Self Administered Questionnaire but that had not previously been coded in time for the version 1 release.
- Records in h20pr_mc that had been incorrectly excluded from version 1

In version 2, we also updated the PN for the following HHID PNs

HHID	OLD PN	NEW PN
038308	041	043
014427	011	012
031059	031	032
072327	041	042
120250	011	012
212207	011	012
525002	021	022
916759	011	012

1B. The Sample Interviewed in 2020

The data collection period for the 2020 interview was March 2020 through May 2021. The HRS sample is comprised of seven sub-samples (HRS, AHEAD, CODA, WAR BABY, EARLY BABY BOOMER, MIDDLE BABY BOOMER and LATE BABY BOOMER).

The first sub-sample, the HRS sub-sample, consists of people who were born 1931 through 1941 and were household residents of the conterminous U.S. in the spring 1992, and their spouses or partners at the time of the initial interview in 1992

or at the time of any subsequent interview. The HRS sub-sample was interviewed in 1992 and every two years thereafter.

The AHEAD sub-sample consists of people who were born in 1923 or earlier, were household residents of the conterminous U.S. in the spring 1992, and were still household residents at the time of their first interview in 1993 or 1994, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The AHEAD sub-sample was interviewed in 1993-94, 1995-96, 1998 and every two years thereafter.

The Children of the Depression (CODA) sub-sample consists of people who were born in 1924 through 1930, were household residents of the conterminous U.S. when first interviewed in 1998, and who, at that time, did not have a spouse or partner who was born before 1924 or between 1931 and 1947, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Children of the Depression sub-sample was interviewed in 1998 and every two years thereafter.

The War Baby (WB) sub-sample consists of people who were born in 1942 through 1947, were household residents of the conterminous U.S. in the spring 1992, who, at that time, did not have a spouse or partner born before 1924 or between 1931 and 1941, and were still household residents at the time of the first interview in 1998, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The War Baby sub-sample was interviewed in 1998 and every two years thereafter.

The Early Baby Boomer (EBB) sub-sample consists of people who were born in 1948 through 1953, were household residents of the U.S. when first interviewed in 2004, and who, at that time, did not have a spouse or partner who was born before 1948, and their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Early Baby Boomer sub-sample was interviewed in 2004 and every two years thereafter.

The Mid Baby Boomer (MBB) sub-sample consists of people who were born between 1954 and 1959, were household residents of the U.S. when first interviewed in 2010/2011, and who, at that time, did not have a spouse or partner who was born before 1954, along with their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Middle Baby Boomer sub-sample was interviewed in 2010/2011 and every two years thereafter.

Both the EBB and MBB sub-samples were supplemented in the 2010 wave with a sample of individuals residing in areas with 10% or higher concentrations of Black and/or Hispanic populations in order to boost the size of the minority samples in those cohorts.

The Late Baby Boomer (LBB) sub-sample consists of people who were born in 1960-1965, were household residents of the U.S. when first interviewed in 2016, and who, at that time, did not have a spouse or partner who was born before 1959, along with their spouses or partners at the time of the initial interview or at the time of any subsequent interview. The Late Baby Boomer sub-sample was interviewed in 2016 and will be interviewed every two years thereafter.

Original sample members are those selected as described above and their spouses or partners at the time of the initial interview in 1992 (HRS), 1993 (AHEAD), 1998 (CODA or WB), 2004 (EBB), 2010/2011 (MBB) or 2016 (LBB). For more details about the sample, see our [Web site](#).

1C. 2020 Questionnaire Sections

2020 Section	Content
PR	Preload
A	Coverscreen
B	Demographics
C	Physical Health
D	Cognition
COV	COVID-19
E	Family Structure
F	Parents, Siblings and Transfers
G	Functional Limitations and Helpers
H	Housing
I	Physical Measures and Biomarkers
J	Employment
J2	Pensions
J3	Retirement and Social Security
M	Disability
N	Health Services and Insurance
P	Expectations
Q	Assets and Income
R	Asset Change
S	Widowhood and Divorce
T	Wills and Life Insurance
U	Asset Verification
V	Modules
W	Event History, Internet Use and Social Security
Y	Time Calculations
IO	Interviewer Observations
LB	Leave-Behind Questionnaires
TN	Thumbnails

1D. Levels of Files

In the 2020 data collection instrument, most questions were asked of all respondents. Some questions were asked about the household. For two-respondent households, household level questions were asked of one respondent who was designated as the financial respondent, family respondent, or coverscreen respondent (the first respondent interviewed) on behalf of the entire household.

In addition to the familiar household-level and respondent-level files, the 2020 HRS Core (Early, Version 2.0), contains files at seven other levels: household-member-and-child, sibling, helper, transfer-to-child, transfer-from-child, jobs, and pension.

1D1. Household Level Files

Household-level files contain questions that were asked about the household of a designated coverscreen, financial, or family respondent. A coverscreen respondent answered family questions (section A) on behalf of the entire household; the coverscreen respondent may or may not be the family respondent. A family respondent answered family questions (section E) on behalf of the entire household, and a financial respondent answered household-level financial questions (sections H, Q, R and U) on behalf of the entire household. The household-level files contain one record for each household in which at least one interview was obtained in 2020.

1D2. Respondent Level Files

Respondent-level files contain questions that were asked of all respondents about themselves (or asked of a proxy about the respondent if the respondent was not able to give an interview). The files contain one record for each respondent or proxy who gave an interview in 2020.

1D3. Sibling Level File

The sibling-level file consists of characteristics of the respondent's siblings. If a respondent had at least one living parent, he/she was asked a variety of questions about his/her siblings (Section F). The sibling file contains one record for each sibling of a respondent. Each respondent reports on his/her own parents and siblings. Sibling data are also stored in the preload section, H20PR_SB.

1D4. Household Member and Child Level Files

Household-member-and-child-level-files contain characteristics about household members and children. This information can come from Section A. (coverscreen) or the family respondent in Section E and also in the preload section.

1D5. Helper Level File

The helper-level file contains information provided by each respondent about helpers. A helper may be a person or organization that was reported by the respondent as providing help with Activities of Daily Living (ADLs) or Instrumental Activities of Daily Living (IADLs). The file contains one record for each helper. If a child helped both respondents in a two respondent household, the helper file will contain two records - one of mother's report of the child's helping her and one for father's report of the child's helping him.

1D6. Transfer-to-Child-Level File

The transfer-to-child-level file contains information provided by the family respondent about transfers of money to a child or grandchild. The file contains one record for each transfer to a child or grandchild.

1D7. Transfer-from-Child-Level-File

The transfer-from-child-level file contains information provided by the family respondent about transfers of money from a child or grandchild. The file contains one record for each transfer from a child or grandchild.

1D8. Pension Level Files

Pension-level files contain information about pensions that the respondent has reported over the years during their involvement with the HRS. Each file contains one record for each pension that has been reported and followed up on in the current data collection.

1D9. Jobs level files

Job-level files contain information on jobs the respondent has reported over time. Current jobs are represented, as well as past employment with unresolved pensions from past waves. The files have one record for each job represented.

2. File Naming Conventions

Files are named beginning with "H20" for HRS 2020, followed by a letter (or two) designating the questionnaire section. A separator, "_" and then one or two letters designating the level follows the section letter designator.

H for household-level

R for respondent-level
MC for household-member-and-child-level
SB for sibling-level
HP for helper-level
TC for transfer-to-child-level
FC for transfer-from-child-level
JB for jobs-level
P for pension-level

For example, the file H20A_R includes variables from Section A (coverscreen) at the respondent level, whereas, H20A_H contains variables from Section A (coverscreen) at the household level.

The following extensions are used for the six different types of files that are distributed.

.da for data files,
.sas for SAS program statements,
.sas7bdat for "ready-to-use" SAS files,
.sps for SPSS program statements,
.sav for "ready-to-use" SPSS files,
.do for Stata DO statements,
.dct for Stata dictionary statements,
.dta for "ready-to-use" Stata files, and
.txt for codebook files.

One of each of these file types is provided for each of the 39 data files for the 2020 HRS Core (Early, Version 2.0) data release. For example,

H20A_R.da contains respondent data from Section A,
H20A_R.sas contains corresponding SAS program statements,
H20A_R.sas7bdat contains "ready-to-use" data in SAS format
H20A_R.sps contains corresponding SPSS program statements,
H20A_R.sav contains "ready-to-use" data in SPSS format
H20A_R.do contains corresponding Stata DO statements,
H20A_R.dct contains corresponding Stata dictionary statements,
H20A_R.dta contains "ready-to-use" data in Stata format, and
H20A_R.txt contains the ASCII codebook.

3. Data Files

The 2020 HRS Core (Early, Version 2.0) data are distributed in 39 data files. The files are listed below along with the number of cases (N), number of variables (NV), and the primary identifiers (IDS). The records in the data files are sorted in order by these primary identifiers.

The 2020 HRS Core data are provided in ASCII format, with fixed-length records. Use associated SAS, SPSS or Stata program statements to read the data into the analysis package of your choice.

Household level files, IDS=HHID, RSUBHH

H20A_H	N=11490	NV=48
H20E_H	N=11490	NV=145
H20H_H	N=11490	NV=216
H20PR_H	N=11490	NV=43
H20Q_H	N=11490	NV=670
H20R_H	N=11490	NV=113

H20U_H N=11490 NV=247

Respondent level files, IDS=HHID, PN, RSUBHH

H20A_R	N=15723	NV=38
H20B_R	N=15723	NV=170
H20C_R	N=15723	NV=260
H20COV_R	N=15723	NV=162
H20D_R	N=15723	NV=276
H20F_R	N=15723	NV=191
H20G_R	N=15723	NV=156
H20IO_R	N=15723	NV=72
H20J_R	N=15723	NV=601
H20J3_R	N=15723	NV=180
H20LB_R	N=15723	NV=523
H20M1_R	N=15723	NV=263
H20M2_R	N=15723	NV=377
H20N_R	N=15723	NV=341
H20P_R	N=15723	NV=58
H20PR_R	N=15723	NV=181
H20S_R	N=15723	NV=115
H20T_R	N=15723	NV=108
H20TN_R	N=15723	NV=20
H20V_R	N=15723	NV=246
H20W_R	N=15723	NV=18
H20Y_R	N=15723	NV=35

Household member and child level files, IDS=HHID, RSUBHH, OPN

H20PR_MC	N=62184	NV= 26
H20E_MC	N=51689	NV= 29

Sibling level files, IDS=HHID, PN, OPN

H20PR_SB	N=16113	NV= 16
H20F_SB	N=16113	NV= 29

Transfer-to-child-level-file, IDS=HHID, RSUBHH

H20E_TC	N=4206	NV= 25
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Transfer-from-child-level-file, IDS=HHID, RSUBHH

H20E_FC	N=888	NV= 27
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Helper level file, IDS=HHID, PN, OPN

H20G_HP	N=3983	NV= 31
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Jobs level file, IDS=HHID, PN, JOBID

H20PR_JB	N=23889	NV= 16
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Pension level files, IDS=HHID, PN, Pension ID

H20PR_P	N=7516	NV= 17
H20J2_P	N=8934	NV= 184

3A. Construction of the Interviewer Observation Files (IO_R and IO_H).

The interview observations can have many entries for each sample ID. In order to create the release files we use the following guidelines:

IO_R: we first look for the lines are taken from a completed interview (result code = 1001). If there is no such data for a given Sample ID, we then take the last observation recorded for that sample ID.

IO_H: is a little more complicated, as the most important factor for the Household level file is the housing observations, which can be recorded at any time. For each HH, we look for the first and most complete set of housing observation questions for the household, as it could have been recorded on the line of either respondent. We use that record for the Household Level observation file. Note: IO_H data are not available with the 2020 Early Core data.

4. Identification Variables

Identification variables for HRS 2020 are stored in character format.

4A. Primary Identification Variables

Several variables, HHID, RSUBHH, PN, OPN, are used in various combinations to uniquely identify the nine different level datasets that comprise this data release.

4A1. HHID - Household Identification Number

In the initial wave of data collection (in 1992 for the HRS sub-sample, in 1993 for the AHEAD sub-sample, 1998 for the WB and CODA sub-samples, 2004 for the EBB sub-sample, 2010/2011 for the MBB sub-sample and 2016 for the LBB sub-sample), each sample household was assigned a Household Identifier. HHID is stable across waves of data collection and uniquely identifies the original household and any households derived from that household in subsequent waves of data collection. HHID has six-digits.

4A2. RSUBHH - 2020 Sub-household Identifier

In combination with HHID, RSUBHH uniquely identifies a household at the time of the 2020 data collection. Sub-household identifiers can be different at each wave. RSUBHH has one-digit. For more information, see Examples of [Sub-Household and Respondent Person Number and Other Person Number Assignments](#).

4A3. PN - Person Number

In combination with HHID, PN uniquely identifies a respondent or respondent's spouse or partner. PNs are unique within an original household (HHID). The PN assigned to a particular respondent does not change across waves. PN has three-digits.

4A4. OPN - Other Person Number.

In the 2020 data collection HHID, RSUBHH and OPN uniquely identify another person in the household member and child files; HHID, PN, and OPN uniquely identify another person in the helper or sibling files. OPN has three-digits.

4B. Primary Identification Variables for Datasets at Each of the Nine Levels

Two identifiers uniquely identify records in the

- o respondent-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER

Two identifiers uniquely identify records in the

- o household-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) RSUBHH 2020 SUB HOUSEHOLD IDENTIFICATION NUMBER

Three identifiers uniquely identify records in the

- o helper-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER

- 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
- 3) OPN OTHER PERSON NUMBER

Three identifiers uniquely identify records in the

- o household-member-and-child-level:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) RSUBHH 2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
 - 3) OPN OTHER PERSON NUMBER

Three identifiers uniquely identify records in the

- o sibling-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) OPN OTHER PERSON NUMBER

Three identifiers uniquely identify records in the

- o transfer-to-child-level, and
- o transfer-from-child-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) RSUBHH 2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
 - 3) OPN OTHER PERSON NUMBER

Three identifiers uniquely identify records in the

- o Pension Level Data sets
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) Z505 PENSION TRACKING NUMBER

Three identifiers uniquely identify records in the

- o Jobs level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) Z504 JOB TRACKING NUMBER

4C. Secondary Identification Variables

In addition to the primary identification variables that uniquely identify records in a dataset, secondary identification variables that allow links to other datasets are provided. Two sets of secondary identification variables are provided. They are listed below.

Secondary Identification Variables for

- o respondent-level datasets
- o sibling level datasets
- o helper-level datasets
- o job-level datasets and
- o Pension-level datasets

- RSUBHH 2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
- QSUBHH 2018 SUB HOUSEHOLD IDENTIFICATION NUMBER
- RPN_SP 2020 SPOUSE/PARTNER PERSON NUMBER
- RCSR 2020 WHETHER COVERSHEET RESPONDENT
- RFAMR 2020 WHETHER FAMILY RESPONDENT
- RFINR 2020 WHETHER FINANCIAL RESPONDENT

Secondary Identification Variables for

- o household level datasets
- o household member or child level datasets

- o transfer-from-child-level datasets and
- o transfer-to-child-level datasets

RSUBHH 2020 SUB HOUSEHOLD IDENTIFICATION NUMBER
 QSUBHH 2018 SUB HOUSEHOLD IDENTIFICATION NUMBER
 OPN_CS PERSON NUMBER OF COVER SCREEN RESPONDENT
 RPN_FAM 2020 FAMILY RESP PERSON NUMBER
 RPN_FIN 2020 FINANCIAL RESP PERSON NUMBER
 RPN_NCS 2020 NON-COVERSCREEN RESP PERSON NUMBER
 RPN_NFAM 2020 NON-FAMILY RESP PERSON NUMBER
 RPN_NFIN 2020 NON-FINANCIAL RESP PERSON NUMBER

4D. Datasets Including RSUBHH and OPN as Primary Identifiers

When working with datasets including RSUBHH and OPN as primary identifiers -- household-member-and-child-level, it is essential to use RSUBHH to distinguish other persons.

Sometimes records with the same HHID and OPN will be separate reports about the same person. For example, [Couple with Children and Siblings Divorces](#), the record where HHID is 890121, RSUBHH is 1, and OPN is 101 is the report about the child from the mother, and the record where HHID is 890121, RSUBHH is 2, and OPN is 101 is the report about the same child from the father.

At other times records with the same HHID and OPN will be reports about different persons. For example, a couple divorces, one respondent remarries, and both split-off households have new members. When a couple divorces and both split-off households have new members, the record where HHID is 871231, RSUBHH is 2, and OPN is 151 is for the ex-wife's mother, while the record where HHID is 871231, RSUBHH is 1, and OPN is 151 is for the ex-husband's new stepchild.

5. Distribution Files and Directory Structure

5A. Distribution Files

The files are packaged for download from our Web site in two different ways - as one large .zip file that contains six smaller .zip files, one .pdf file, and one .txt file, or the six smaller files available individually for separate download. The combined file is H20core.zip.

The individual .zip files for separate download are:

ASCII data files

H20da.zip contains data files.

Program statements and "ready-to-use" files

H20sas.zip contains SAS program statements (.sas) and "ready-to-use" files (.sas7bdat)

H20sps.zip contains SPSS program statements (.sps) and "ready-to-use" files (.sav)

H20sta.zip contains Stata program statements (.do), dictionary statements (.dct) and "ready-to-use" files (.dta)

Documentation files

H20cb.zip contains the codebook.

H20qn.zip contains the questionnaire.

H20dd.pdf - this document.

5B. Directory Structure

While a particular setup is not required for using HRS files, we have traditionally suggested a directory structure. By using this directory structure, you will not have to change the path name in your program statement files. If you use a different structure, just change the directory references in the program statement files.

Directory	Contents
c:\hrs2020	Files downloaded from Web site
c:\hrs2020\codebook	Unzipped files from H20cb.zip
c:\hrs2020\data	Unzipped files from H20da.zip
c:\hrs2020\qnaire	Unzipped files from H20qn.zip
c:\hrs2020\sas	Unzipped files from H20sas.zip
c:\hrs2020\spss	Unzipped files from H20sps.zip
c:\hrs2020\stata	Unzipped files from H20sta.zip

Decompress the selected .zip files into the appropriate subdirectories.

6. Program Statements

Each data file comes with associated SPSS, SAS, or Stata program statements to read the data. Files containing SPSS statements are named with .SPS extension, those with SAS statements with a .SAS extension, and those with Stata statements with .DO and .DCT extensions.

The statement files are named beginning with the same prefix as the corresponding data file. For example, SAS statements in the file H20A_R.SAS go with the H20A_R.DA data file.

6A. Using the Files with SAS

To create a SAS system file for a particular dataset, two file types must be present for that dataset -- .SAS program statement files and .DA data files.

To create a SAS system file, load the *.SAS file into the SAS Program Editor.

If the *.SAS file is located in "c:\hrs2020\sas" and the data file is located in "c:\hrs2020\data", you can run the file as is. A SAS system file (*.SD2 or *.SAS7BDAT) will be saved to directory "c:\hrs2020\sas".

If the files are not located in the specified directories, you will need to edit the *.SAS file to reflect the proper path names prior to running the file.

6B. Using the Files with SPSS

To create an SPSS system file for a particular dataset, two file types must be present for that dataset -- .SPS program statement files and .DA data files.

To create an SPSS system file, open the *.SPS file in SPSS as an SPSS Syntax File.

If the *.SPS file is located in "c:\hrs2020\spss" and the data file is located in "c:\hrs2020\data", you can run the file as is. An SPSS system file (*.SAV) will be saved to directory "c:\hrs2020\spss".

If the files are not located in the specified directories, you will need to edit the *.SPS file to reflect the proper path names prior to running the file.

6C. Using the Files with Stata

To use Stata with a particular dataset, the following three file types must be present for that dataset -- .DCT files, .DO files, and .DA data files.

Files with the suffix .DA contain the raw data for Stata to read. Files with the suffix .DCT are Stata dictionaries used by Stata to describe the data. Files with the suffix .DO are short Stata programs ("do files") which you may use to read in the data. Load the .DO file into Stata and then submit it.

If the *.DO and *.DCT files are located in "c:\hrs2020\Stata" and the data file is located in "c:\hrs2020\data", you can run the .DO file as is.

If the files are not located in these directories, you must edit the *.DO and *.DCT files to reflect the proper path names before you run the files.

Note that the variable names provided in the .DCT files are uppercase. If you prefer lower case variable names, you may wish to convert the .DCT files to lower case prior to use. You may do this by reading the .DCT file into a text or word processing program and changing the case. For instance in Microsoft Word, Edit, Select All, Format, Change Case, lowercase.

7. Loading HRS Data Products in a Non-Windows Environment

All files released by The Health and Retirement Study are created in a Windows environment. This means that non-Microsoft users will need to modify the default Windows file structure syntax to match that of their own operating system. The instructions in this section provide advice on how to make these changes.

7A. Working in an OS X Environment

The following examples should work for both Macintosh OS X and any Unix/Linux distribution. Open the SAS program file(s), SPSS syntax file(s) or the Stata do/dct files in an ASCII editor and make the changes indicated below.

Important items for Mac OS X users to consider:

1. Use **Stuffit** instead of **Archive Utility** to decompress the downloaded zip file into a desktop folder.
2. When using the Apple ASCII text editor (**TextEdit**), select *Preferences* and make these changes...
 - Under Format, select *Plain text*
 - Under Options, uncheck
 - o *Smart quotes*
 - o *Smart dashes*

Better yet, install and use **TextWrangler**

7A1. OS X: SPSS

In this example, we assume that the user has downloaded the 2020 tracker dataset and placed the files in a **Desktop** folder called **trk2020** with the ASCII data file (.da) stored in subfolder **data** and the syntax file (.sps) in subfolder **spss**. The commands in the syntax file(s) should be modified to look like this:

```
FILE HANDLE trk2020TR_R /name='~/Desktop/trk2020/data/TRK2020TR_R.da'  
LRECL=221.  
DATA LIST FILE= trk2020TR_R /  
HHID 1-6(A)  
[rest of syntax file goes here]  
.  
execute.
```

```
SAVE /outfile '~/Desktop/trk2020/spss/TRK2020TR_R.sav'.  
Execute.
```

7A2. OS X: Stata

In the following example we assume that the user has downloaded the 2020 tracker dataset and placed the files in a **Desktop** folder called **trk2020** with the ASCII data file (.da) stored in subfolder **data** and the syntax files (.do/.dct) in subfolder **stata**. Next step is to modify the .do and .dct files in the stata folder:

File TRK2020TR_R.do:

```
Change from...  
        infile using c:\trk2020\stata\TRK2020TR_R.dct  
To...  
        infile using ~/Desktop/trk2020/stata/TRK2020TR_R.dct
```

```
Change from...  
        save c:\trk2020\stata\TRK2020TR_R.dta  
To...  
        Save ~/Desktop/trk2020/stata/TRK2020TR_R.dta
```

File TRK2020TR_R.dct:

```
Change from...  
dictionary using c:\trk2020\data\TRK2020TR_R.da {  
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"  
column(7) str3 PN %3s "PERSON NUMBER"  
  
        [additional dictionary statements]  
}  
To...  
dictionary using ~/Desktop/trk2020/data/TRK2020TR_R.da {  
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"  
column(7) str3 PN %3s "PERSON NUMBER"  
  
        [additional dictionary statements]
```

7B. Working in a Linux Environment

7B1. Linux: Stata

In the following system file build example we assume that the user (user1) has downloaded the 2020 tracker dataset and placed the files in a folder called **trk2020** (/home/user1/trk2020), with the ASCII data file (.da) stored in subfolder **data** (/home/user1/trk2020/data) and the syntax files (.do/.dct) in subfolder **stata** (/home/user1/trk2020/stata).

This process is very similar to the OS X example shown above. The main difference is that the file/folder structure will be somewhat different when the .do and .dct files in the stata folder are modified.

```
File TRK2020TR_R.do:  
Change from...  
        infile using c:\trk2020\stata\trk2020tr_r.dct  
To...  
        infile using /home/user1/trk2020/stata/trk2020tr_r.dct  
  
Change...  
        save c:\trk2020\stata\TRK2020TR_R.dta
```


To...

```
Save /home/user1/trk2020/stata/trk2020tr_r.dta
```

File TRK2020TR_R.dct:

Change from...

```
dictionary using c:\trk2020\data\trk2020tr_r.da {  
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"  
column(7) str3 PN %3s "PERSON NUMBER"
```

```
    [additional dictionary statements]
```

```
}
```

To...

```
dictionary using /home/user1/trk2020/data/trk2020tr_r.da {  
  
column(1) str6 HHID %6s "HOUSEHOLD IDENTIFIER"  
column(7) str3 PN %3s "PERSON NUMBER"
```

```
    [additional dictionary statements]
```

```
}
```

7B2. Linux: SAS

In the following examples we assume that the user (user1) is working in a folder named **saswork** (/home/user1/saswork), and is creating a SAS version of HRS products in a separate sub-folders (e.g./home/user1/saswork/2020/sas).

Building SAS system files (One Section)

In the following example we assume that the user has downloaded the 2020 tracker dataset and placed the files in a folder called trk2020 (/home/user1/saswork/trk2020) with the ASCII data file (.da) stored in subfolder **data** (/home/user1/saswork/trk2020) and the syntax file (.sas) in subfolder **sas** (/home/user1/saswork/trk2020/sas). Next step is to modify trk2020tr_r.sas to match the folder structure:

In file trk2020tr_r.sas:

Change from...

```
LIBNAME trk2020 'c:\trk2020\sas\';  
DATA trk2020.trk2020tr_r;  
INFILE 'c:\trk2020\data\trk2020tr_r.da' LRECL = 1028;
```

To...

```
LIBNAME trk2020 '/home/user1/saswork/trk2020/sas/';  
DATA trk2020.trk2020tr_r;  
INFILE '/home/user1/saswork/trk2020/trk2020tr_r.da' LRECL = 1028;
```

When the SAS file is run, it will create file trk2020tr_r.sas7bdat in folder /home/user1/saswork/trk2020/sas/.

Building SAS system files (Multiple Sections)

In the following example we assume that the user has downloaded the HRS 2020 Core dataset and placed the files in a folder called hrs2020 (/home/user1/saswork/hrs2020) with the ASCII data files (H20{sec}_{lvl}.da) stored in subfolder **data** (/home/user1/saswork/hrs2020/data) and the syntax files (H20{sec}_{lvl}.sas) in subfolder **sas** (/home/user1/saswork/hrs2020/sas).

Important: Begin by modifying each syntax file as follows:

Change all occurrences of...

```
LIBNAME H2020 'c:\hrs2020\sas\';
```

To...

```
LIBNAME H2020 '/home/user1/saswork/hrs2020/sas/';
```

Change the INFILE statement in each .sas file from...

```
INFILE 'c:\hrs2020\data\H20{sec}_{lvl}.da' LRECL = nnn;
```

To...

```
INFILE '/home/user1/saswork/hrs2020/data/H20{sec}_{lvl}.da' LRECL=nnn;
```

Example

```
INFILE '/home/user1/saswork/hrs2020/data/H20A_H.da' LRECL=87;
```

8. Documentation

There are several types of documentation available for use with the 2020 HRS Core (Early, Version 2.0) data release. These include a codebook and the 2020 box-and-arrow questionnaire. In addition, 2020 variables have been added to the [Online Concordance](#).

8A. Codebook

The HRS 2020 Codebook is provided as a series of 40 ASCII text files, as well as a file containing all sections. There is a codebook file corresponding to each data file. Each variable has its own codebook entry. The format of the codebook is, for the most part, consistent with all previous releases.

8A1. Variable Names

Variable names begin with a letter designating the wave of data collection (R for 2020), followed by the section letter, and numbers after the section letter. For example, RC001 where R=2020, C=section C (physical health), and 001 is the variable number. Variables from the preload section of the instrument will have either QX or QZ as prefix letters. The X indicates a variable that is updated by data collected in later sections of the questionnaire, whereas the Z indicates preloaded data that were not changed by subsequent answers to questions. For example:

```
RX007_R    RESP FAM/FIN TYPE - UPDATED  
RZ077_R    PREV WAVE R FIN/FAM TYPE
```

RX007_R indicates that the preloaded Financial or Family respondent was changed, or updated, later in the instrument from what had been preloaded (or assigned) prior to the start of the 2020 interview.

8A1a. Multiple-response and Looped Variables

There are two types of variables with multiple mention indicators. First are simple multiple mentions and second are multiple mentions within loops.

Simple multiple mention variables take the form: (wave prefix) + (section letter) + (variable number) + (mention number). For example, RN219M1 through RN219M5 are 2020 variables from section N with one through 5 mentions.

Variable names for multiple mentions to questions within a loop take the form: (wave prefix) + (section letter) + (variable number) + (underscore) + (loop iteration) + (letter designating mention number). For example, RN049_1M1, is a 2020 variable from section N, variable number 049 in the first iteration of the loop, and the first mention.

Simple loop variables (not a multiple mention) have an underscore (_) in their name and a suffix that designates the loop, e.g., RN025_1.

For variables that have a "W" right after the section designator, the variable names are slightly different. Variable names for multiple mentions to questions within a W-loop take the form: (wave prefix) + (section letter) + ("W") + (variable number) + (letter designating loop iteration) + (mention number). For example, RKW097A1, is a 2020 variable from section K, variable number 097 in the first iteration of the loop, and the first mention. Other non-multiple mention variables within this type of loop are named with the letter designating the loop iteration. For example, RKW002A, is variable number 002 in the first iteration of the loop.

Null multiple mention variables and variables from null loops beyond the first mention or first loop are not included in the data. It is generally the case that one null multiple mention and one null loop was retained.

8A1b. Masked Variables

To protect the confidentiality of the information that respondents provide, a number of variables have been masked or are simply not included in the Early release public dataset. Some of these variables may be made available to analysts as restricted data in the future. See our Web site for details.

Names, addresses, days of birth, information on geographical relocation and similar variables are not included in publicly released files.

Geographical locations are recoded to a level no more detailed than U.S. Census Region and Division. Data on the highest educational degree earned have been further grouped together to increase cell sizes.

The names of variables that were masked for confidentiality end in the capital letter "M"; for example, variable RX026M (1ST ADDRESS STATE - MASKED).

8A1c. Other Specify Questions, Comments and Open Ends

"Other Specify" and "Open End", or questions that are answered with text (e.g., vocabulary words, industry and occupation) are not included in Early data releases. In many instances, these appear as blanks in the data but sometimes they are designated with "Data Not Available" text. Data from these types of questions should be available, where possible, in the Final data release.

8A2. Other Types of Documentation

In addition to this document and the codebook, three additional types of documentation are available.

8A2a. Overview of HRS Public Data Files for Cross-sectional and Longitudinal Analysis

This is a thorough document that provides a description of structure and content for all HRS public data files and a detailed explanation for handling the longitudinal nature of the survey. It is located here:
<http://hrsonline.isr.umich.edu/sitedocs/dmgt/OverviewofHRSPublicData.pdf>

8A2b. Box and Arrow Questionnaire

The research community has referred to the type of documentation that describes the questions asked in the interview as a "questionnaire". Since the 2020 HRS data were collected using a Computer Assisted Interview (CAI) program, a traditional hard-copy questionnaire was not produced as part of the data

collection phase. Therefore, in order to document question sequencing, we have provided a current-wave version of the traditional box and arrow questionnaire. The Box and Arrow Questionnaires are the "commented version" which include all changes made for the 2020 instrument. Changes can be found by searching for "#@" in the document.

8A2c. Cross-Wave Tracker File

The cross-wave tracker file contains basic demographic information, interview status, and if, when and how an interview was conducted during a specific data collection period. The cross-wave tracker file also contains weight variables. The tracker file contains one record for every person who was ever eligible to be interviewed in any wave. Please refer to the Cross-Wave Tracker data description, located at the top of our [Data Descriptions and Release Notes](#) page for a more detailed description.

8B. Master Codes

A master code file contains detailed codeframes used in several sections of the codebook. The master codes include health conditions, occupation codes, industry codes, and state and country codeframes. The master codes appear in [Appendix B](#).

9. Additional Notes

The following are miscellaneous additional notes regarding the 2020 HRS Core (Early, Version 2.0). If we become aware of additional issues, they will be posted on our Web site in the [Data Alerts](#) section.

9A. Households with No Family or Financial Respondents

As noted earlier in this document, the data collection design was to have asked most questions of all respondents and some questions of just a designated coverscreen, or family, or financial respondent on behalf of the household. However, occasionally that is not what happened. For some households we did not obtain an interview from a family or financial respondent. There were 447 households that had no family respondent; 282 households had no financial respondent. There are 5 missing coverscreen respondents in this wave. The household records for these households contain null values for the missing information. Households missing a family or financial respondent can be identified, respectively, by values of "Blank. No family/financial respondent" (in the household record) in the following variables:

RPN_FAM - 2020 FAMILY RESP PERSON NUMBER

RPN_FIN - 2020 FINANCIAL RESP PERSON NUMBER

9B. Unfolding Bracket Variables and Imputations

Typically, a series of unfolding bracket questions followed a lead-in question asking for an amount. If an actual amount was not given, a series of "unfolding" questions were asked. The manner in which the unfolding questions were programmed (Blaise) is different for the 2002 through 2010 data compared to the CAI (SurveyCraft) software used for 1993 through 2000. This change was transparent to the respondents, since exactly the same questions were asked with the new software as would have been asked with the old software; but it did have an implication for the data that were actually stored and also for the data that are released.

Instead of storing the response to each unfolding question, three summary variables were generated: the minimum and maximum values for the amount, given the answers to the unfolding questions, and if the last answer a respondent gave in an unfolding sequence was either "Don't Know" or "Refused," what that answer was. In 2002, if the Respondent said "more than" to the unfolding question with the highest value, then the maximum value was stored as ten times that value.

However, in 2004 and 2010, if the Respondent said "more than" to the unfolding question with the highest value, then the maximum value was stored as 99999996.

For most analysts, those three variables (and in particular, the minimum and maximum of the possible range) will be sufficient for analyses. For any analyst who needs the more detailed information, it should be noted that the three variables, combined with the information about the unfolding questions provided in the box-and-arrow and codebook, are sufficient to allow the analyst to reconstruct the sequence of questions asked of any respondent, and the answers to each of those questions in many of the unfolding sequences.

For other sequences -- those in which respondents were randomly assigned to one of three "entry" points for the first unfolding question -- the analyst will also need to take into account a fourth variable (located in the preload sections) that specifies the entry point for each respondent. The following example shows the preload variable (PZ041) and the unfolding sequence that uses the random entry point from RZ041.

Example Random Entry Assignment Variable from Preload:

Preload Variable from the data file H20pr_h:

```
.....
RZ041          PREASSIGNED UNFOLD RANDOM VALUE - SELF EMPLOYMENT
Section: PR    Level: Household      Type: Numeric   Width: 1   Decimals: 0
Ref: HH.X041_UnfSEmpInc_V

          UNFOLD ASSIGN - SELF EMPLOYMENT INCOME
.....
          3782          1.  RANDOM ASSIGNMENT 1
          3828          2.  RANDOM ASSIGNMENT 2
          3864          3.  RANDOM ASSIGNMENT 3
           16          Blank.  Data Missing
.....
```

Unfolding Series from section Q that uses RX041 to assign respondents an entry point:

```
.....
QQ016          R INCOME FROM SELF EMPLOYMENT - MIN
Section: Q     Level: Household      Type: Numeric   Width: 6   Decimals: 0
Ref: SecQ.RIncome.Q016_
```

(Thinking about your self-employment income in [Last Calendar Year]):

Did it amount to less than \$____ , more than \$____ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down
BREAKPOINTS: \$5,000, \$10,000, \$25,000, \$100,000
RANDOM ENTRY POINT ASSIGNMENT [1 (\$5,000)] or [2 (\$10,000)] or
[{NOT 1 and NOT 2} (\$25,000)] AT X041

```
.....
          118          0.  Value of Breakpoint
           10          5000. Value of Breakpoint
           20          5001. Value of Breakpoint
            8          10000. Value of Breakpoint
           21          10001. Value of Breakpoint
            1          25000. Value of Breakpoint
           24          25001. Value of Breakpoint
            4          100001. Value of Breakpoint
          11270          Blank.  INAP (Inapplicable); Partial Interview
.....
```

```

.....
.....
QQ017                      R INCOME FROM SELF EMPLOYMENT - MAX
Section: Q      Level: Household      Type: Numeric      Width: 8      Decimals: 0
Ref: SecQ.RIncome.Q017_

```

```

.....
      38      4999.  Value of Breakpoint
      10      5000.  Value of Breakpoint
      23      9999.  Value of Breakpoint
       8     10000.  Value of Breakpoint
      20     24999.  Value of Breakpoint
       1     25000.  Value of Breakpoint
      20     99999.  Value of Breakpoint
       4    100000.  Value of Breakpoint
      96   99999996.  Greater than Maximum Breakpoint
11270      Blank.  INAP (Inapplicable); Partial Interview

```

```

.....
.....
QQ018                      R INCOME FROM SELF EMPLOYMENT - RESULT
Section: Q      Level: Household      Type: Numeric      Width: 2      Decimals: 0
Ref: SecQ.RIncome.Q018_

```

*

```

.....
       9          0.  No Breakpoint values given during interview
      22         98.  DK (Don't Know); NA (Not Ascertained)
      58         99.  RF (Refused)
11401      Blank.  INAP (Inapplicable); Partial Interview

```

9C. 2020 Unfoldings Issues

Due to a programming issue, some errors were introduced into unfoldings data obtained from interviewer-administered interviews in 2020 when an interviewer backed up into an unfolding while outside of the unfolding and changed a response. To correct problems with unfoldings data, HRS staff compared audit trail data, which presents a record of the entries made and actions taken by interviewers as they completed an interview, against the Blaise data. Where possible, the audit trail data was used to reconstruct the interview data however not all unfoldings problems could be resolved due to incomplete or missing audit data.

9D. Modules for the 2020 Data Collection

There are 10 modules for 2020 HRS. The module data can be found in the file H20V_R. Topical areas of the modules include:

- Module 1: Retirement Knowledge Scale
- Module 2: Long term care insurance procrastination
- Module 3: Depression
- Module 4: Social Security Knowledge
- Module 5: Time Inconsistency
- Module 6: Upper extremity difficulties
- Module 7: Probability Numeracy
- Module 8: Longevity and Regret
- Module 9: End of Life Decisions
- Module 10: Substance Use Problems

The following variables of Module 10 are available in the public use file:
RV652 ALCOHOL FREQUENCY
RV653 ALCOHOL FREQUENCY 4/5 OR MORE
RV654 TOBACCO FREQUENCY

The remaining Module 10 variables will be made available as a sensitive health data product.

9E. Explanation of the Difference between Tracker and Core Data Releases

There are some areas where the Tracker File and the core data are different. Below are some examples. The examples rely on data from the HRS 2008 Core.

LSUBHH - The tracker file assigns a '9' for all new spouses in 2008 for the previous wave's SUBHH number. The 2008 Final Release data, however, lists the SUBHH number of the household that the new spouse married into, since the new spouse will 'inherit' many of the relationships from that household.

LPN_SP - Even if a spouse did not give an interview in 2008, a spouse PN (LPN_SP) will exist in the core data. Additionally, for a non-original R's new spouse, we assign a spouse PN (LPN_SP) and track the spouse's influence on the household with that number, even though we will never interview that person. In contrast, the tracker file will not reference these spouses.

Family and Financial R Assignments - As we keep a record of a non-interviewed spouse in the core data, we also release their assigned role in the household (i.e. family or financial R) with a listing for LPN_FIN, and LPN_FAM in the household sections. The tracker file will simply list the assignments of the people interviewed. Therefore, for example, the 2008 Core Final data has a blank line in Section H for a household where '020' was the non-interviewed financial R. The tracker file would show the same household as not having a financial R.

Marital Status - It is important to note that marital status, as it was assigned in the 2008 data (LB063) may be different from the marital status variable (xMARST) in the Tracker file. Please refer to the Cross-Wave Tracker data description, located at the top of our [Data Descriptions and Release Notes](#) page for a more detailed description of how marital status was assigned and the criteria used to reclassify respondents. The marital status variable in the Tracker file was constructed by looking at several different sources of data, whereas the marital status variable in the 2008 Core Final data was not changed using outside sources, in order to preserve the flow through the instrument for respondents.

9F. Enhanced Face-to-Face Sample Design and Content

In 2006, HRS initiated what is referred to as an Enhanced Face-to-Face Interview. In addition to the core interview, the Enhanced Face-to-Face Interview includes a set of physical performance measures, collection of biomarkers, and a Leave-Behind Questionnaire on psychosocial topics. A random one-half of households were pre-selected for the enhanced face-to-face interview in 2006, with the other half of the sample selected for 2008, and the design is repeated in each subsequent wave. In coupled households, both members of the couple are selected. Selected respondents who completed a self (as opposed to proxy) interview, in-person (at least through Section I - the physical measures and biomarkers section), and who were non-institutionalized at the time of the interview were eligible for the physical measures and biomarkers components. This same group of respondents, plus those for whom an in-person proxy interview was completed, were also eligible for the Leave-Behind Questionnaire.

Psychosocial Leave-Behind Questionnaire (Section LB_R)

In 2004, HRS added a new feature for data collection in the form of self-administered questionnaires that were left with respondents upon the completion of an in-person Core Interview, referred to as the Leave-Behind Questionnaire. The purpose of the Leave-Behind Questionnaire is to collect additional information from respondents without adding to the interview length. In 2018, as in previous data collections since 2006, the Leave-Behind Questionnaire was incorporated into the Enhanced Face-to-Face Interview. The Leave-Behind Questionnaire administered in 2010 is called the Participant Lifestyle Questionnaire, and it includes questions on participation in general activities, relationships with others, and views on their life in general as well as specific aspects of their life.

Physical Performance Measures and Biomarkers (Section I_R)

- Blood pressure
- Hearing test
- Breathing test (peak flow)
- Grip strength
- Balance tests (semi-tandem, side-by-side, and with [30/60] second full-tandem)
- Timed walk (8 ft., eligible if 65 or older)
- Height
- Weight (eligible if weight is under 300 pounds)
- Waist circumference
- Saliva (for which DNA was extracted and stored - eligible if saliva invalid previous wave or no saliva collection previous wave)
- Dry blood spots (analyzed for Hemoglobin A1c, total cholesterol and HDL cholesterol)

With the exception of the timed walk, which was administered only to respondents 65 years of age or older, the physical measures and biomarkers were conducted on the full enhanced face-to-face sample.

Three separate consents were obtained to cover: 1) all of the physical measures, plus blood pressure; 2) saliva sample; and 3) dry blood spots. The physical measures booklet, which the interviewers used to administer the physical measures and biomarkers, is available on the HRS website [Physical Measures 2018](#). The booklet contains the consent forms, as well as instructions and protocols for all of the measurements.

9G. Web

In 2020, HRS administered its second wave of Web as an alternate mode for data collection for the core biennial interview. Web was offered as an alternative for telephone and regular face-to-face respondents only; respondents in the half-sample scheduled for the enhanced face-to-face interview were not eligible for Web this wave. Assignment to web mode was made at the household level; for 2-person households both members needed to be eligible as individuals, based on a prior report of internet access along with other selection criteria (e.g., English speaking, self-respondent, non nursing-home resident in prior wave). Of the 3,476 Web eligible households, 2,618 or 75% were randomly selected for the Web sample with the remainder receiving their usual mode of either telephone or face-to-face for comparison purposes.

Participants in the Web sample were sent an advance letter inviting them to complete their 2020 interview on the Web. The advance letter contained information to access the survey. Five days later, nonresponding cases were sent an email invitation with information to access the survey. Respondents were provided with contact information (a toll-free number and email address) to contact us if they needed assistance accessing the web survey or preferred to complete their interview by phone. Email and mail reminders were sent approximately every 6 days.

Participants in the Web sample who had not completed the survey after six weeks were contacted by an interviewer for a phone interview. Any cases started on the web were able to resume the survey where they left off in the new mode. The Web survey was programmed to be as close as possible to the phone and in-person. Rather than break the survey into modules we designed it to allow respondents to work at their own pace and to stop at any point and return later to continue, even if they required several sessions to complete it.

Mode Variables

Within each section data file, mode variables are provided to aid in identifying which mode a respondent was in when they completed a given section: phone, face-to-face and Web. For Web we make a further distinction of "Web" and "Web-small" to differentiate between respondents who used a PC versus those who used smartphones or tablets. Respondents could switch back and forth between PC and smartphone or tablet throughout the interview.

Non-Response

In the web version of the questionnaire, respondents are allowed to leave any given question that was presented on the screen unanswered to comply with the voluntary nature of the survey. This was distinctly different from the interviewer-administered version of the questionnaire which did not allow questions to be "empty." If the respondent could not or refused to answer, the interviewer could select "Don't Know" or "Refused" as appropriate.

Web non-response cases were reviewed by HRS staff. We have incorporated "web non-response" indicators in the data to signal where a question was presented to the respondent but they did not answer. The web non-response flags are based on the final path taken by the respondent through the interview. If the respondent backed up to change an answer and went down a different path, the data for the first path was not retained.

Metadata

The Web survey was programmed to be as close as possible to the other modes. There are instances where the question text for Web differs from the telephone/in-person interview question text. The question text is documented in the codebook as "WEB-ADMINISTERED TEXT" as shown below. The questionnaire contains a complete description of the interview content by section including question wording, order and flow.

```
-----  
QB000                                LIFE SATISFACTION  
Section: B      Level: Respondent      Type: Numeric      Width: 2      Decimals: 0  
Ref: SecB.B000_
```

Now, please think about your life-as-a-whole. How satisfied are you with it? Are you completely satisfied, very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

WEB-ADMINISTERED TEXT:

Now, please think about your life-as-a-whole. How satisfied are you with it?

.....

3261	1.	COMPLETELY SATISFIED
6700	2.	VERY SATISFIED
4123	3.	SOMEWHAT SATISFIED
564	4.	NOT VERY SATISFIED
143	5.	NOT AT ALL SATISFIED
197	8.	DK (Don't Know); NA (Not Ascertained)
14	9.	RF (Refused)
721	Blank.	INAP (Inapplicable); Partial Interview

Section D Cognition

HRS generated new variables for the Section D Web Immediate and Delayed Word Recall as described in the tables below.

Immediate Recall

Delayed Recall

Variable Name	Description
RD182WM#	WEB WORD RECALL IMMED. (where # denotes the multiple mention indicator 1, 2, 3, etc.)
RD174W	WEB NUMBER GOOD - IMMEDIATE
RD175W	WEB NUMBER WRONG - IMMEDIATE
RD176W	WEB NUMBER FORGOTTEN - IMMEDIATE
RD177W	WEB NONE REMEMBERED - IMMEDIATE - FLAG

Variable Name	Description
RD183WM#	WEB WORD RECALL DELAYED (where # denotes the multiple mention indicator 1, 2, 3, etc.)
RD184W	WEB NUMBER GOOD - DELAYED
RD185W	WEB NUMBER WRONG - DELAYED
RD186W	WEB NUMBER FORGOTTEN - DELAYED
RD187W	WEB NONE REMEMBERED - DELAYED
RD191W	WEB WORDLIST CHECK DID R USE AID

The CALCULATED NUMBER SERIES SCORE (RNSSCORE) and STANDARD ERROR OF NUMBER SERIES SCORE (RNSSCORESE) variables in Section D require additional review by HRS Staff. These variables are designated as under review in the codebook and will be made available in the next data release.

9H. COVID-19

The data collection period for the 2020 interview was March 2020 through June 2021. Due to the restrictions on social contact during the fieldwork period, most interviews were conducted via telephone or web. Enhanced Face-to-Face interviews were not collected. As a result, data from Section I (Physical Measures and Biomarkers) and Section IO_H (Interviewer Observations Household) are not available. Respondents who would have had their interview conducted as enhanced face-to-face (EFTF) were sent the self-administered leave behind questionnaire (SAQ) by mail, following their core interview.

HRS added COVID-19-related questions to the 2020 core interview (filename: h20cov_r) and to the psychosocial self-administered questionnaire (questionnaire pages 36-43; filename: h201b_r).

The COVID-19 module (h20cov_r) of HRS 2020 was administered to the 50% random subsample of households who were originally assigned to enhanced face-to-face interviewing (EFTF). Due to the restrictions on social contact during the fieldwork period, interviews were conducted via telephone. This EFTF subsample was further split into two random subsamples as described below:

- EFTF1 Release 1 was the first subsample and it was released to fieldwork on June 11, 2020. At the same time HRS added the COVID module questions to the core telephone interview that was administered both to the EFTF sample and respondents in the telephone sample. The COVID module questions were first administered in June 2020.
- EFTF Release 2 was the second subsample and it was released to fieldwork on September 24, 2020. At that point we made additional edits to the COVID module questions.

Thus, the COVID module data are available for the random half sample that was assigned to EFTF plus the nonrandom group of respondents who were assigned to telephone interviewing and completed those interviews in June 2020 or later. The COVID module was not administered to web respondents. The variable RCOVSAMP (in h20cov_r) indicates which EFTF Release a respondent was assigned to, Release 1 (June 2020) or Release 2 (September 2020), or whether they were not in the EFTF sample.

The release package of files that is available to download with this data product contains the "commented version" of the questionnaires that describe in detail all changes made for the 2020 instrument. The COVID module questions were first added in Data Model 7. All Data Models that followed (except Data Model 9) included changes to the COVID module questions. Data users can identify question text and other changes by searching for "#@" in the "commented version" of the COVID module questionnaire. The commented box and arrow questionnaires are available in the download set (h20qn.zip). Data Model changes are described in Appendix D ([link](#)).

The COVID-19 Project data was a special midterm data release that HRS originally released in November 2020 and then updated in February 2021. It included a special release of 3,266 respondents from the EFTF Release 1 subsample. The variable RCOVFLAG indicates respondents who were included in the COVID-19 Project data release.

9I. Whole Blood Draws

Beginning in 2016, The Health and Retirement Study started collecting whole blood samples from respondents. Individuals are asked to consent to the whole blood draw at the end of the core interview and are mailed a \$50 token of appreciation subsequent to the consent and before the whole blood draw appointment. An "acknowledgement of consent" is signed at the time of collection. In 2018, the entire LBB (Late Baby Boomer) cohort, anyone eligible for the whole blood draw in 2016 who did not consent to or complete a WBD request at that time, and any new respondents were eligible to participate. This request was made to all eligible self-interview Rs (regardless of mode of interview or preferred language), provided they were not in a nursing home.

9J. Errata

2020 Self-Administered Questionnaire (SAQ)

The English version of the self-administered questionnaire variable Q69 includes two "Exercise at home" items which correspond to variables RLB069G and RLB069M in Section LB. These appear in the data as they were recorded by the respondent, regardless of whether they contain conflicting information.

Variable LB019 of the SAQ for waves 2006-2002 and 2018-2020 included 15 items. The same question was named LB018 in waves 2014 and 2016 and it consisted of 10 items that were presented in a slightly different order than in the other waves. Beginning with 2020, the LB019 data and codebook will align with how the variables appear in the questionnaire.

The following table lists the question and variable name from 2006-2020.

Question Text	Variable Name by Wave							
	2006	2008	2010	2012	2014	2016	2018	2020
If something can go wrong for me, it will.	KLB019F	LLB019F	MLB019F	NLB019F	OLB018A	PLB018A	QLB018A	RLB018F
I'm always optimistic about my future.	KLB019G	LLB019G	MLB019G	NLB019G	OLB018B	PLB018B	QLB018B	RLB018G
In uncertain times, I usually expect the best.	KLB019H	LLB019H	MLB019H	NLB019H	OLB018C	PLB018C	QLB018C	RLB018H
Overall, I expect more good things to happen to me than bad.	KLB019I	LLB019I	MLB019I	NLB019I	OLB018D	PLB018D	QLB018D	RLB018I
I hardly ever expect things to go my way.	KLB019J	LLB019J	MLB019J	NLB019J	OLB018E	PLB018E	QLB018E	RLB018J
I rarely count on good things happening to me.	KLB019K	LLB019K	MLB019K	NLB019K	OLB018F	PLB018F	QLB018F	RLB018K
I feel it is impossible for me to reach the goals that I would like to strive for.	KLB019L	LLB019L	MLB019L	NLB019L	OLB018G	PLB018G	QLB018G	RLB018L
The future seems hopeless to me and I can't believe that things are changing for the better.	KLB019M	LLB019M	MLB019M	NLB019M	OLB018H	PLB018H	QLB018H	RLB018M
I don't expect to get what I really want.	KLB019N	LLB019N	MLB019N	NLB019N	OLB018I	PLB018I	QLB018I	RLB018N
There's no use in really trying to get something I want because I probably won't get it.	KLB019O	LLB019O	MLB019O	NLB019O	OLB018J	PLB018J	QLB018J	RLB018O
Most people dislike putting themselves out to help other people.	KLB019A	LLB019A	MLB019A	NLB019A	N/A	N/A	QLB018K	RLB018A
Most people will use somewhat	KLB019B	LLB019B	MLB019B	NLB019B	N/A	N/A	QLB018L	RLB018B

unfair means to gain profit or an advantage rather than lose it.								
No one cares much what happens to you.	KLB019C	LLB019C	MLB019C	NLB019C	N/A	N/A	QLB018M	RLB018C
I think most people would lie in order to get ahead.	KLB019D	LLB019D	MLB019D	NLB019D	N/A	N/A	QLB018N	RLB018D
I commonly wonder what hidden reasons another person may have for doing something nice for me.	KLB019E	LLB019E	MLB019E	NLB019E	N/A	N/A	QLB018O	RLB018E

HHID = 918364 PN = 020. The respondent (proxy) completed Sections A through most of Section J. The respondent then asked their spouse to answer financial questions and the spouse answered all remaining questions in the interview.

Section H

Some respondents were erroneously skipping question H101. This was corrected in Data Model 5.

Section J2

In the pension section, W403 is a question that confirms the preloaded information was correct for a given pension. If the preloaded information is correct, the respondent selects 1 (yes) and moves on to the next pension. Some preload data was not correctly copied over to W405 (provider type). HRS will update this in the next data release.

Section G

Some respondents who reported they received help at one Activity of Daily Living (ADL) did not get the ADL follow-up loop at G176. This issue has gone undiscovered for several waves. HRS broadened who should get question G176 which means that more people will get the question in 2020 than in previous waves.

Section PR_R

There was a problem where preload (Z076) was being wiped out for eleven web respondents who repeatedly clicked the login button.

Section G: Functional Limitations and Helpers

Due to a programming error, some respondents were not asked certain variables in Section G: Functional Limitations and Helpers.

The following variables were impacted by this error:

RG021 DIFFICULTY- BATHING
 RG023 DIFFICULTY- EATING
 RG025 DIFFICULTY- GET IN/OUT BED
 RG030 DIFFICULTY- USING TOILET

For cases affected by this error, HRS imputed missing data for the 2020 Early Core release. The variable RADLIMP denotes which cases include imputed data. The issue was fixed for Data Model 8 and later.

Based on imputed responses to the ADL sequence, some respondents were incorrectly not asked the questions listed below. Data for these items was not imputed.

RG022 BATHE HELP
RG024 EAT HELP
RG026 BED EQUIPMENT
RG027 WHAT BED EQUIPMENT
RG029 BED HELP
RG031 TOILET HELP
RG032 WHO HELPS MOST
RG033 HELPER RELATIONSHIP TO R
RG035 ANYONE ELSE HELP

9K. Summary of Data Model (DM) Changes during 2020 Production

During the field period, changes to the instrument were made in order to correct errors in programming, improve the quality of the data, modify the question wording/content or to add new questions. A complete listing of Data Model changes (that impact Core data) is provided in Appendix D ([link](#)). The variable QVDATE (which corresponds to the field DM Version in the table provided in the Appendix) exists in all of the data files and it tells what version of the data model was used to collect a given interview.

9L. New/Modified Questions in HRS 2020

- A255_A020 (Web Only): New question to confirm coupleness status.
- A248 (FACILITY NAME, A249 (FACILITY ADDRESS 1), A250 (FACILITY ADDRESS 2): New questions to obtain Facility name and address if respondent is in any type of long-term health care facility.
- B136 (MOTHER WORK OUTSIDE OF HOME) and B137 (MOTHERS MAIN OCCUPATION): New questions
- N282 (AGE/YEAR WHEN COVERAGE STARTED): Added new response options
- W550-W643: New questions to capture information about the effects of the Coronavirus pandemic

10. OBTAINING THE DATA

10A. Registration and Downloading the Data

HRS data are available for free to researchers and analysts at the HRS Web site. In order to obtain public release data, you must first register at our Web site. Once you have completed the registration process, your username and password will be sent to you via e-mail. Your username and password are required to download any data files.

By registering all users, we are able to document for our sponsors the size and diversity of our user community allowing us to continue to collect these important data. Registered users receive user support, information related to errors in the data, future releases, workshops, and publication lists. The information you provide will not be used for any commercial use, and will not be redistributed to third parties.

10B. Conditions of Use

By registering, you agree to the [Conditions of Use](#) governing access to Health and Retirement public release data.

10C. Publications Based on Data

As part of the data registration process, you agree to include specified citations and to inform HRS of any papers, publications, or presentations based on HRS data. Please send a copy of any publications you produce based on HRS data, with a bibliographical reference, if appropriate, to the address below.

Health and Retirement Study
Attn: Papers and Publications
The Institute for Social Research
P.O. Box 1248
Ann Arbor, MI (USA) 48106-1248

Alternately, you may contact us by e-mail at hqsquestions@umich.edu with: "Attn: Papers and Publications" in the subject line.

11. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines to using the 2020 HRS Core (Early, Version 2.0) data. If you have questions or concerns that are not adequately covered here or on our Web site, or if you have any comments, please contact us. We will do our best to provide answers.

11A. HRS Internet Site

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access the data and other relevant information, point your Web browser to the [HRS Web site](#).

11B. Contact Information:

If you need to contact us, you may do so by one of the methods listed below.

Internet: Help Desk at our Web site (<https://hrs.isr.umich.edu/help>)

E-mail: hqsquestions@umich.edu

Postal Service:

Health and Retirement Study
The Institute for Social Research
The University of Michigan
P.O. Box 1248
Ann Arbor, MI 48106-1248

FAX: (734) 647-1186

Appendix

A. Examples of Sub-Household and Respondent Person Number and Other Person Number Assignments

In the first year of data collection, all households, consisting of either a single respondent or of two married or partnered respondents, were assigned a SUBHH of 0.

In subsequent waves, a SUBHH of 0 indicates that the original household has not split due to divorce or separation of spouses or partners, although one member of a couple may have died or a single respondent may have become married or partnered.

A value of 1 or 2 indicates a household in which the original couple split, divorced or separated. One of the original couple is assigned a SUBHH of 1; the other is assigned a SUBHH of 2.

A value of 5 or 6 indicates a previously split household split a second time. One of the couple from a SUBHH 1 or 2 retains a SUBHH of 1 or 2; the other is assigned a SUBHH 5 or 6.

A value of 7 indicates respondents from split household reunited¹. It is important to understand these assignments when you merge records from different waves of the study.

A1. Married Couple Stays Married

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 012345 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

At the time of the second cross-section the two respondents are still married, and each retains their HHID of 012345 and their SUBHH of 0 and his and her PN of 010 and 020, respectively.

Time 1

Household records

HHID=012345 ASUBHH=0

Respondent records

HHID=012345 PN=010 ASUBHH=0

HHID=012345 PN=020 ASUBHH=0

Time 2

Household records

HHID=012345 CSUBHH=0

Respondent records

HHID=012345 PN=010 CSUBHH=0

HHID=012345 PN=020 CSUBHH=0

¹In addition, a SUBHH of 3 or 4 indicates the "household" of a deceased respondent who is considered to be in a household of his or her own. These values do not occur in these files because all records in these files are from living respondents.

A2. Couple Divorces

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 023456 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. Both respondents retain the HHID of 023456, but one is assigned a SUBHH of 1 and the other is assigned a SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively.

Time 1

Household records

HHID=023456 ASUBHH=0

Respondent records

HHID=023456 PN=010 ASUBHH=0

HHID=023456 PN=020 ASUBHH=0

Time 2

Household records

HHID=023456 CSUBHH=1

HHID=023456 CSUBHH=2

Respondent records

HHID=023456 PN=010 CSUBHH=1

HHID=023456 PN=020 CSUBHH=2

A3. One or Both Respondents Die

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 034567 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

One respondent dies before the next wave. At the next wave, both respondents retain their HHID of 034567. The living respondent retains her SUBHH of 0; the deceased respondent is assigned a SUBHH of 3. (If both respondents die, one would be assigned a SUBHH of 3 and the other would be assigned a SUBHH of 4.) Each original respondent retains his and her PN of 010 and 020, respectively.

Time 1

Household records

HHID=034567 ASUBHH=0

Respondent records

HHID=034567 PN=010 ASUBHH=0

HHID=034567 PN=020 ASUBHH=0

Time 2

Household records

HHID=034567 CSUBHH=0

HHID=034567 CSUBHH=3 (in exit interview)

Respondent records

HHID=034567 PN=010 CSUBHH=3 (in exit interview)

HHID=034567 PN=020 CSUBHH=0

A4. Single Respondent Marries

A respondent who has never been married is in the first cross-section. The respondent is assigned a HHID of 045678 and a SUBHH of 0 and a PN of 010.

At the time of the second cross-section, the respondent has married. Both the respondent and her new spouse are assigned a HHID of 045678 and a SUBHH of 0 because the household was not divided. The original respondent retains her PN of 010. Her new spouse is assigned PN of 011.

Time 1

Household records

HHID=045678 ASUBHH=0

Respondent records

HHID=045678 PN=010 ASUBHH=0

Time 2

Household records

HHID=045678 CSUBHH=0

Respondent records

HHID=045678 PN=010 CSUBHH=0

HHID=045678 PN=011 CSUBHH=0

A5. Couple Divorces, One Respondent Remarries and Divorces

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 056789 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced and he has remarried. Both original respondents retain the HHID of 056789, but she is assigned a SUBHH of 1 and he is assigned a SUBHH of 2. His new spouse is also assigned the HHID of 056789 and the SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively. His new spouse is assigned PN of 011.

By the time of the third cross-section, that new couple has gotten divorced. All respondents retain the HHID of 056789. The original sample member ex-wife has the SUBHH of 1. The original sample member ex-husband has a SUBHH of 2, and the non-original sample member, his second ex-wife, is assigned the SUBHH of 5. Each original respondent retains his and her PN of 010 and 020, respectively. His second ex-wife retains her PN of 011.

Time 1

Household records

HHID=056789 ASUBHH=0

Respondent records

HHID=056789 PN=010 ASUBHH=0

HHID=056789 PN=020 ASUBHH=0

Time 2

Household records

HHID=056789 CSUBHH=1

HHID=056789 CSUBHH=2

Respondent records

HHID=056789 PN=010 CSUBHH=2

HHID=056789 PN=011 CSUBHH=2

HHID=056789 PN=020 CSUBHH=1

Time 3

Household records

HHID=056789 FSUBHH=1

HHID=056789 FSUBHH=2

HHID=056789 FSUBHH=5

Respondent records

HHID=056789 PN=010 FSUBHH=2

HHID=056789 PN=011 FSUBHH=5

HHID=056789 PN=020 FSUBHH=1

A6. Couple Divorces and Marries Again

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 067890 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. Both respondents retain the HHID of 067890, but one is assigned a SUBHH of 1 and the other is assigned a SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively.

By the time of the third cross-section, the respondents have remarried each other. Both are assigned the HHID of 067890 and the SUBHH of 7. Each original respondent retains his and her PN of 010 and 020, respectively.

Time 1

Household records

HHID=067890 ASUBHH=0

Respondent records

HHID=067890 PN=010 ASUBHH=0

HHID=067890 PN=020 ASUBHH=0

Time 2

Household records

HHID=067890 CSUBHH=1

HHID=067890 CSUBHH=2

Respondent records

HHID=067890 PN=010 CSUBHH=1

HHID=067890 PN=020 CSUBHH=2

Time 3

Household records

HHID=067890 FSUBHH=7

Respondent records

HHID=067890 PN=010 FSUBHH=7

HHID=067890 PN=020 FSUBHH=7

A7. Married Couple with Children and Siblings

At the time of the first cross-section, sample household with a HHID of 078901 contains two respondents assigned PNs of 010 and 020, respectively. Associated with the household are three children with OPNs of 101, 102, and 103, and two siblings with OPNs of 051 and 052. All seven persons will keep those same PNs and OPNs across time. A friend who lives with the respondents is assigned an OPN of 080. The friend will keep her OPN of 080 across time only if she is a household member at each wave.

Time 1

Household records

HHID=078901 ASUBHH=0

Respondent records

HHID=078901 PN=010 ASUBHH=0

HHID=078901 PN=020 ASUBHH=0

Household member/child records

HHID=078901 ASUBHH=0 OPN=101 (child)

HHID=078901 ASUBHH=0 OPN=102 (child)

HHID=078901 ASUBHH=0 OPN=103 (child)
HHID=078901 ASUBHH=0 OPN=051 (sibling)
HHID=078901 ASUBHH=0 OPN=052 (sibling)
HHID=078901 ASUBHH=0 OPN=080 (friend)

A8. Couple with Children and Siblings Divorces

At the time of the first cross-section, sample household with a HHID of 089012 contains two respondents assigned PNs of 010 and 020, respectively. Associated with the household are two children with OPNs of 101, and 102, and three siblings, her two brothers with OPNs of 051 and 052 and his sister with an OPN of 061. A friend who lives with the respondents is assigned an OPN of 080.

By the time of the second cross-section, the couple has divorced. Both respondents retain the HHID of 089012, but he is assigned a SUBHH of 2 and she is assigned a SUBHH of 1. Each original respondent retains his and her PN of 010 and 020, respectively.

The two children appear both in their father's SUBHH 2 and also in their mother's SUBHH 1 with their respective OPNs, 101, and 102. The three siblings appear in the SUBHH of their respective siblings and maintain their respective OPNs. The ex-wife's brothers appear as part of her SUBHH 1 with their OPNs of 051 and 052, respectively. The ex-husband's sister appears as part of his SUBHH 2 with her OPN of 061. The friend has moved out and does not appear in either household.

Time 1

Household records

HHID=089012 ASUBHH=0

Respondent records

HHID=089012 PN=010 ASUBHH=0

HHID=089012 PN=020 ASUBHH=0

Household member/child records

HHID=089012 ASUBHH=0 OPN=101 (child)

HHID=089012 ASUBHH=0 OPN=102 (child)

HHID=089012 ASUBHH=0 OPN=051 (her brother)

HHID=089012 ASUBHH=0 OPN=052 (her brother)

HHID=089012 ASUBHH=0 OPN=061 (his sister)

HHID=089012 ASUBHH=0 OPN=080 (friend)

Time 2

Household records

HHID=089012 CSUBHH=1

HHID=089012 CSUBHH=2

Respondent records

HHID=089012 PN=010 CSUBHH=2

HHID=089012 PN=020 CSUBHH=1

Household member/child records

HHID=089012 CSUBHH=1 OPN=101 (child)

HHID=089012 CSUBHH=1 OPN=102 (child)

HHID=089012 CSUBHH=1 OPN=051 (her brother)

HHID=089012 CSUBHH=1 OPN=052 (her brother)

HHID=089012 CSUBHH=2 OPN=101 (child)

HHID=089012 CSUBHH=2 OPN=102 (child)

HHID=089012 CSUBHH=2 OPN=061 (his sister)

A9. Couple Divorces, One Respondent Remarries, Both Split-off Households Have New Members

Two respondents in a sample household are married at the time of the first cross-section. Each respondent is assigned a HHID of 090123 and a SUBHH of 0. One respondent has a PN of 010, the other a PN of 020.

By the time of the second cross-section, the couple has divorced. She has moved in with her mother. He has married a woman with two children. At the second cross-section, both original respondents retain the HHID of 090123, but he is assigned a SUBHH of 1 and she is assigned a SUBHH of 2. Each original respondent retains his and her PN of 010 and 020, respectively. His new spouse and new stepchildren are assigned the HHID of 090123 and the SUBHH of 1. His new spouse is assigned a PN of 011. His new stepchildren are assigned OPNs of 151 and 152. Her mother is assigned the HHID of 090123 and the SUBHH of 2 and an OPN of 151.

Time 1

Household records

HHID=090123 ASUBHH=0

Respondent records

HHID=090123 PN=010 ASUBHH=0

HHID=090123 PN=020 ASUBHH=0

Time 2

Household records

HHID=090123 CSUBHH=1

HHID=090123 CSUBHH=2

Respondent records

HHID=090123 PN=010 CSUBHH=1

HHID=090123 PN=011 CSUBHH=1 (new wife)

HHID=090123 PN=020 CSUBHH=2

Household member/child records

HHID=090123 CSUBHH=1 OPN=151 (his stepchild)

HHID=090123 CSUBHH=1 OPN=152 (his stepchild)

HHID=090123 CSUBHH=2 OPN=151 (her mom)

B. Master Codes

Included in this file are the "Master Codes" for HRS. Other areas of the codebook often refer to these lists, as they are too long to replicate at each variable that uses the codes.

The Master Codes in order of appearance are:

B1. Health Conditions - Categorical

B2. Occupation Codes

B3. State and Country Codes

B1. Health Conditions - Categorical

NOTE: If necessary, use individual "Other" categories if system or type of condition is clear; otherwise, code 997.

Cancers and tumors; skin conditions

- 101. Cancer--any site or type; leukemia; Hodgkin's disease; melanomas; non-Hodgkin's lymphoma; tumors if specified as malignant; lymphoma; metastasis angiosarcoma; carcinoma; myeloma/multiple myeloma; myelodysplastic syndrome
- 102. Tumors, cysts or growths (except 101); polyps; osteomyelitis; pre-cancer; neuroma; benign tumors; mole removal; warts; subdural hygroma

103. Skin conditions--any mention except cancer (101) or tumor (102); dermatitis; eczema; rashes; Paget's disease; skin ulcers; bedsores; bullous pemphigoid; hair loss; pemphigus; seborrheic keratosis; rosacea; alopecia; psoriasis; burns (also use code 194 if available)

Musculoskeletal system and connective tissue

111. Arthritis; rheumatism; bursitis; ankylosing spondylitis; Reiter's syndrome; rheumatica; osteoarthritis
112. Back/neck/spine problems: chronic stiffness, deformity or pain; disc problems; scoliosis; spina bifida; bad back; spinal stenosis; back/neck injuries (also use code 194 if available); back/neck sprain (also use code 194 if available)
113. Stiffness, deformity, numbness or chronic pain in foot, leg, arm or hand, shoulder or rotator cuff; bad knee/hip problems; hip/knee replacement; plantar fasciitis; drop foot; leg cramps; tennis elbow; Dupuytren's contracture; sprain of limb (also use code 194 if available)
114. Missing legs, feet, arms, hands, or fingers (from amputation or congenital deformity)
115. Paralysis--any mention (including from polio)
116. Hernias; hiatal hernia; rectocele; cystocele
117. Muscular dystrophy; mitochondrial myopathy
118. Fibromyalgia; fibro myositis; fibrositis; myofascial pain syndrome
119. Other musculoskeletal or connective tissue problems; lupus; osteoporosis; pinched nerve (location not specified); sciatica/sciatic nerve problem; carpal tunnel syndrome; costochondritis; polymyositis; scleroderma; chromosome leak into the muscles; bone spurs (location not specified); cellulitis; tendonitis (location not specified); temporomandibular joint syndrome (TMJ); trigeminal neuralgia; CREST syndrome/limited scleroderma; polymyalgia/polymyalgia rheumatica; avascular necrosis/osteonecrosis, neural muscular myositis, bone disease, myalgia, myositis, osteopenia; adhesions (location not specified); neuritis; skull bone injuries (also use code 194 if available); vascular necrosis; broken or damaged bones (location not specified) from injuries/accidents (also use code 194 if available); pulled muscle (location not specified -also use code 194 if available); strain (location not specified - also use code 194 if available); tendon damage (location not specified - also use code 194 if available); sprain (location not specified - also use code 194 if available); post-polio syndrome (without mention of paralysis); loss of calcium

Heart, circulatory and blood conditions

121. Heart problems: heart attack (coronary) or failure; arteriosclerosis; heart aneurysms; heart deformities/congenital heart deformities; angina; bad heart; congestive heart disease; cardiomyopathy; atrial fibrillation; myocardial infarction (MI); multiple infarction; myocardinitis, endocarditis; myocardial ischemia; heart murmurs; heart valve blockage; heart valve prolapse; heart valve replacement; arterial blockage; hardening of arteries; heart bypass surgery; mitral valve prolapse; myocardial ischemia; rheumatic heart disease
122. High blood pressure / hypertension (HTN); uncontrollable blood pressure; blood pressure problems, not specified high or low
123. Stroke; cerebral hemorrhage or accident; hematoma (if related to brain); transient ischemic attack (TIA);
124. Blood disorders: blood disease, anemia; aplastic anemia; hypoplastic anemia; hemophilia; polycythemia vera; bad blood; toxemia; cold agglutinin disease; triglycerides or high triglycerides; toxoplasmosis; blood

- transfusion; sickle cell trait; bone marrow failure; factor VIII/factorVIII deficiency/elevated factor VIII ; thrombocytopenia; hemochromatosis;
129. Other circulatory problems; phlebitis, clots/blood clots, embolisms; varicose veins; hemorrhoids; low blood pressure; giant cell arteritis; hematoma (if not related to brain or location not specified); gangrene; vascular disease; pulmonary thrombosis; pulmonary embolism; Raynaud's disease; APLS Hughes syndrome; aneurysm (when not in heart or location not specified); elasticity of arteries; calcification of limbs; lymphedema; claudication, pulmonary hypertension; rheumatic fever; occult cerebral vascular malformation; bleeding (location not specified); blockage in lung; Rendu-Osler-Weber disease/syndrome

Respiratory system conditions

131. Allergies; hay fever; sinusitis; sinus problems; sinus headaches; tonsillitis; celiac disease/sprue (gluten intolerance); hives
132. Asthma
133. Bronchitis; pneumonia; acute upper respiratory problems; Legionnaire's disease; fungus in chest; respiratory pulmonary disease
134. Emphysema; chronic obstructive pulmonary disease (COPD); smoking related lung problems
139. Other respiratory/breathing problems; tuberculosis; sarcoidosis; ventilatory insufficiency; pulmonary idiopathic fibrosis; respiratory failure, NFS; asbestos in lungs; black lung; pleurisy

Endocrine, metabolic and nutritional conditions

141. Diabetes; pre-diabetic; high blood sugar
142. Thyroid trouble; goiter; hyperthyroidism; Graves's disease; Hashimoto's disease
143. Cystic fibrosis
144. Nutritional problems; weight problems; eating disorders; high cholesterol; hypercholesterolemia; obesity; iron deficiency; overweight; vitamin deficiency
145. Sugar problems, NFS; erratic blood sugar
149. Other endocrine/metabolic problems; pancreatitis; pituitary problems; gland problems; Addison's disease; gout, nephrotic syndrome; primary adrenal insufficient; parathyroid problems; endocrinology syndrome; amyloidosis; haemochromatosis; hypoglycemia; low blood sugar; loss of calcium; alpha-1 antitrypsin deficiency; acromegaly; hormone problems; hyperpituitarism; hypoglycemia

Digestive system (stomach, liver, gallbladder, kidney, bladder)

151. Stomach and intestinal conditions: acid reflux, reflux disease, heartburn, stomach reflux, GERD, Barrett's esophagus, ulcers (stomach, peptic, duodenal or not further specified); colitis; ulcerative colitis; gastritis; diverticulosis; diverticulitis; appendicitis; Crohn's disease; intestinal adhesions; abdominal adhesions; colostomy; silicate's disease; stomach pains, ileostomy, dumping syndrome; gastroenteritis, Irritable Bowel Syndrome; diarrhea; bowel incontinence; appendectomy; enteritis; ileitis; peritonitis; stomach removal
152. Liver conditions: cirrhosis; hepatitis; benign hepatic hypertrophy; encephalopathy (caused by liver problems or cause not specified); jaundice
153. Kidney conditions: kidney stones; kidney failure (including dialysis); nephritis
154. Gallbladder conditions; blockage of bile ducts; gallstones; gallbladder removal
155. Bladder conditions (except 156); urinary infections; interstitial cystitis, urosepsis

- 156. Urinary incontinence; urinary loss/leakage; problems with bladder control
- 157. Spleen conditions; enlarged spleen
- 159. Other digestive system problems; internal bleeding; hemorrhage; esophagus torn, ruptured or bleeding; swallowing difficulty; feeding tube

Neurological and sensory conditions

- 161. Blindness or vision problems: glaucoma; cataracts; detached/torn retina; macular degeneration; uveitis; ocular myasthenia gravis; conjunctivitis; eye conditions, NFS
- 162. Deafness; hearing loss or other ear conditions; tinnitus; vestibular disorder; Meniere's disease
- 163. Multiple sclerosis; cerebral palsy; epilepsy; Parkinson's; amyotrophic lateral sclerosis (ALS) or Lou Gehrig's disease); seizures; neuropathy; peripheral neuropathy
- 164. Speech conditions--any mention; congenital speech defects; stuttering; laryngectomy; speech impediment
- 165. Mental retardation; mental impairment; learning disabilities; Down syndrome; dyslexia
- 169. Other neurological/sensory problems; headaches; migraines; dizziness; blackouts; brain damage, NFS (also use code 194 if available); meningitis; arachnoiditis; Bell's palsy; Charcot-Marie-Tooth disease; Guillain-Barre syndrome; medial nerve palsy; myasthenia gravis/myasthenia (non-ocular); myokymia; reflex sympathetic dystrophy (RSD); restless legs syndrome (RLS); Sjogren's syndrome; spasmodic torticollis; balance problems; closed head injury; coma; paralyzed diaphragm; facial neuralgia; hydrocephalus; inclusive body myositis; spinal cerebella ataxia; benign/familiar tremors, vertigo; upper motor neuron/motoneuron problems, progressive supranuclear palsy (PSP); thoracic outlet syndrome; dysautonomia; shaky hands; spinal cord damage from injuries/accident (also use code 194 if available)

Reproductive system and prostate conditions

- 171. Pregnancy and childbirth problems; miscarriage; hemorrhaging or complications from birth of child; episiotomy; Rh factor
- 172. Infertility; sterilization; vasectomy; tubal ligation
- 173. Prostate conditions; PSA/high PSA
- 179. Other problems of reproductive system; hysterectomy; ovarian problems; PMS; menopause; dysmenorrhea; endometriosis; painful menstrual periods; female problems; gynecological problems, NFS; removal of reproductive organs (excluding cancer and tumors)

Emotional and psychological conditions

- 181. Alcoholism
- 182. Drug abuse/addiction/dependence
- 183. Other severe psychological conditions: (chronic) depression; schizophrenia; mania; paranoia; autism; psychosis; agoraphobia; bipolar disorder (manic-depression); post-traumatic stress disorder (PTSD)
- 189. Other emotional and psychological problems; mental problems, NFS; nerves; nervous breakdown; stress; stress related problems; night wandering; panic attacks; anxiety; behavioral problems; insomnia; attention deficit disorder (ADD)

Miscellaneous

- 191. Alzheimer's disease; senility, dementia; multi-infarct dementia; memory loss; mixed cognitive disease
- 192. Dental and gum conditions--any mention
- 193. Acute infectious diseases; flu; colds; fever; mumps; Dengue fever; Lyme disease; infection, staph infection; methicillin-resistant staphylococcus

- aureus (MRSA); Epstein-Barr virus; mononucleosis; influenza; measles; rubella; strep throat; virus, NFS; septic shock; toxic shock; sepsis; shingles; polio (without mention of paralysis)
- 194. Injuries and traumas: broken bones; fractures; pulled muscles; strains; tendon damage; burns, lacerations; concussion; side effects/conditions due to surgery, side effects due to medication; graft-versus host disease LOW PRIORITY--code resulting chronic or ongoing conditions if possible
- 195. Sleep disorders; sleep apnea; narcolepsy; cataplexy
- 196. Immune system disorders; human immunodeficiency virus (HIV) positive; acquired immunodeficiency syndrome (AIDS); AIDS related complex (ARC)

Cause of death

- 601. Suicide
- 602. Murder
- 603. Killed in war/combat
- 604. Motor vehicle accident - incl. as pedestrian
- 605. Industrial/work related accident
- 606. Sporting accident
- 607. Other accidental death; accidental death - NA type of accident
- 608. Still born; died at birth or infancy - NFS

Why Admitted

- 701. No other care arrangements available
- 702. Deteriorating health; health condition not specified
- 703. To recover/rehab; for injury/surgery

Other symptoms

- 595. Old age; everything wore out; bedridden; infirmity; natural causes; failure to thrive in older adults
- 596. Lack of energy/strength; (chronic) fatigue, NFS; don't have get up and go
- 597. Edema; retaining water; retaining fluids; swelling (location not specified)
- 996. None, no health condition(s) mentioned
- 997. Other health condition
- 998. DK (Don't Know); NA (Not Ascertained)
- 999. RF (Refused)

B2. Occupation Codes

Equivalent numeric codes follow the alphabetic codes. Either code may be used, depending on the processing method. The abbreviation "pt" means "part" and "n.e.c." means "not elsewhere classified."

MGR Management Occupations

- 001. Chief Executives
- 002. General and Operations Managers
- 003. Legislators
- 004. Advertising and Promotions Managers
- 005. Marketing and Sales Managers
- 006. Public Relations Managers
- 010. Administrative Services Managers
- 011. Computer and Information Systems Managers
- 012. Financial Managers
- 013. Human Resources Managers
- 014. Industrial Production Managers
- 015. Purchasing Managers

- 016. Transportation, Storage, and Distribution Managers
- 020. Farm, Ranch, and Other Agricultural Managers
- 021. Farmers and Ranchers
- 022. Constructions Managers
- 023. Education Administrators
- 030. Engineering Managers
- 031. Food Service Managers
- 032. Funeral Directors
- 033. Gaming Managers
- 034. Lodging Managers
- 035. Medical and Health Services Managers
- 036. Natural Science Managers
- 040. Postmasters and Mail Superintendents
- 041. Property, Real Estate, and Community Association Managers
- 042. Social and Community Service Managers
- 043. Managers, All Other

BUS Business Operations Specialists

- 050. Agents and Business Managers of Artists, Performers, and Athletes
- 051. Purchasing Agents and Buyers, Farm Products
- 052. Wholesale and Retail Buyers, Except Farm Products
- 053. Purchasing Agents, Except Wholesale, Retail, and Farm Products
- 054. Claims Adjusters, Appraisers, Examiners, and Investigators
- 056. Compliance Officers, Except Agriculture, Construction, Health and Safety, and Transportation
- 060. Cost Estimators
- 062. Human Resources, Training, and Labor Relations Specialists
- 070. Logisticians
- 071. Management Analysts
- 072. Meeting and Convention Planners
- 073. Other Business Operations Specialists

FIN Financial Specialists

- 080. Accountants and Auditors
- 081. Appraisers and Assessors of Real Estate
- 082. Budget Analysts
- 083. Credit Analysts
- 084. Financial Analysts
- 085. Personal Financial Advisors
- 086. Insurance Underwriters
- 090. Financial Examiners
- 091. Loan Counselors and Officers
- 093. Tax Examiners, Collectors, and Revenue Agents
- 094. Tax Preparers
- 095. Financial Specialists, All Other

CMM Computer and Mathematical Occupations

- 100. Computer Scientists and Systems Analysts
- 101. Computer Programmers
- 102. Computer Software Engineers
- 104. Computer Support Specialists
- 106. Database Administrators
- 110. Network and Computer Systems Administrators
- 111. Network Systems and Data Communications Analysts
- 120. Actuaries
- 121. Mathematicians

- 122. Operations Research Analysts
- 123. Statisticians
- 124. Miscellaneous Mathematical Scientists and Technicians

ENG Architecture and Engineering Occupations

- 130. Architects, Except Naval
- 131. Surveyors, Cartographers, and Photogrammetrists
- 132. Aerospace Engineers
- 133. Agricultural Engineers
- 134. Biomedical Engineers
- 135. Chemical Engineers
- 136. Civil Engineers
- 140. Computer Hardware Engineers
- 141. Electrical and Electronics Engineers
- 142. Environmental Engineers
- 143. Industrial Engineers, including Health and Safety
- 144. Marine Engineers and Naval Architects
- 145. Materials Engineers
- 146. Mechanical Engineers
- 150. Mining and Geological Engineers, Including Mining Safety Engineers
- 151. Nuclear Engineers
- 152. Petroleum Engineers
- 153. Engineers, All Other
- 154. Drafters
- 155. Engineering Technicians, Except Drafters
- 156. Surveying and Mapping Technicians

SCI Life, Physical, and Social Science Occupations

- 160. Agricultural and Food Scientists
- 161. Biological Scientists
- 164. Conservation Scientists and Foresters
- 165. Medical Scientists
- 170. Astronomers and Physicists
- 171. Atmospheric and Space Scientists
- 172. Chemists and Materials Scientists
- 174. Environmental Scientists and Geoscientists
- 176. Physical Scientists, All Other
- 180. Economists
- 181. Market and Survey Researchers
- 182. Psychologists
- 183. Sociologists
- 184. Urban and Regional Planners
- 186. Miscellaneous Social Scientists and Related Workers
- 190. Agricultural and Food Science Technicians
- 191. Biological Technicians
- 192. Chemical Technicians
- 193. Geological and Petroleum Technicians
- 194. Nuclear Technicians
- 196. Other Life, Physical, and Social Science Technicians

CMS Community and Social Services Occupations

- 200. Counselors
- 201. Social Workers
- 202. Miscellaneous Community and Social Service Specialists
- 204. Clergy
- 205. Directors, Religious Activities and Education

206. Religious Workers, All Other

LGL Legal Occupations

210. Lawyers
211. Judges, Magistrates, and Other Judicial Workers
214. Paralegals and Legal Assistants
215. Miscellaneous Legal Support Workers

EDU Education, Training, and Library Occupations

220. Postsecondary Teachers
230. Preschool and Kindergarten Teachers
231. Elementary and Middle School Teachers
232. Secondary School Teachers
233. Special Education Teachers
234. Other Teachers and Instructors
240. Archivists, Curators, and Museum Technicians
243. Librarians
244. Library Technicians
254. Teacher Assistants
255. Other Education, Training, and Library Workers

ENT Arts, Design, Entertainment, Sports, and Media Occupations

260. Artists and Related Workers
263. Designers
270. Actors
271. Producers and Directors
272. Athletes, Coaches, Umpires, and Related Workers
274. Dancers and Choreographers
275. Musicians, Singers, and Related Workers
276. Entertainers and Performers, Sports and Related Workers, All Other
280. Announcers
281. News Analysts, Reporters and Correspondents
282. Public Relations Specialists
283. Editors
284. Technical Writers
285. Writers and Authors
286. Miscellaneous Media and Communication Workers
290. Broadcast and Sound Engineering Technicians and Radio Operators
291. Photographers
292. Television, Video, and Motion Picture Camera Operators and Editors
296. Media and Communication Equipment Workers, All Other

MED Healthcare Practitioners and Technical Occupations

300. Chiropractors
301. Dentists
303. Dietitians and Nutritionists
304. Optometrists
305. Pharmacists
306. Physicians and Surgeons
311. Physician Assistants
312. Podiatrists
313. Registered Nurses
314. Audiologists
315. Occupational Therapists
316. Physical Therapists
320. Radiation Therapists

- 321. Recreational Therapists
- 322. Respiratory Therapists
- 323. Speech-Language Pathologists
- 324. Therapists, All Other
- 325. Veterinarians
- 326. Health Diagnosing and Treating Practitioners, All Other
- 330. Clinical Laboratory Technologists and Technicians
- 331. Dental Hygienists
- 332. Diagnostic Related Technologists and Technicians
- 340. Emergency Medical Technicians and Paramedics
- 341. Health Diagnosing and Treating Practitioner Support Technicians
- 350. Licensed Practical and Licensed Vocational Nurses
- 351. Medical Records and Health Information Technicians
- 352. Opticians, Dispensing
- 353. Miscellaneous Health Technologists and Technicians
- 354. Other Healthcare Practitioners and Technical Occupations

HLS Healthcare Support Occupations

- 360. Nursing, Psychiatric, and Home Health Aides
- 361. Occupational Therapist Assistants and Aides
- 362. Physical Therapist Assistants and Aides
- 363. Massage Therapists
- 364. Dental Assistants
- 365. Medical Assistants and Other Healthcare Support Occupations

PRT Protective Service Occupations

- 370. First-Line Supervisors/Managers of Correctional Officers
- 371. First-Line Supervisors/Managers of Police and Detectives
- 372. First-Line Supervisors/Managers of Fire Fighting and Prevention Workers
- 373. Supervisors, Protective Service Workers, All Other
- 374. Fire Fighters
- 375. Fire Inspectors
- 380. Bailiffs, Correctional Officers, and Jailers
- 382. Detectives and Criminal Investigators
- 383. Fish and Game Wardens
- 384. Parking Enforcement Workers
- 385. Police and Sheriff's Patrol Officers
- 386. Transit and Railroad Police
- 390. Animal Control Workers
- 391. Private Detectives and Investigators
- 392. Security Guards and Gaming Surveillance Officers
- 394. Crossing Guards
- 395. Lifeguards and Other Protective Service Workers

EAT Food Preparation and Serving Occupations

- 400. Chefs and Head Cooks
- 401. First-Line Supervisors/Managers of Food Preparation and Serving Workers
- 402. Cooks
- 403. Food Preparation Workers
- 404. Bartenders
- 405. Combined Food Preparation and Serving Workers, Including Fast Food
- 406. Counter Attendant, Cafeteria, Food Concession, and Coffee Shop
- 411. Waiters and Waitresses
- 412. Food Servers, Non-restaurant
- 413. Dining Room and Cafeteria Attendants and Bartender Helpers
- 414. Dishwashers

- 415. Host and Hostesses, Restaurant, Lounge, and Coffee Shop
- 416. Food Preparation and Serving Related Workers, All Other

CLN Building and Grounds Cleaning and Maintenance Occupations

- 420. First-Line Supervisors/Managers of Housekeeping and Janitorial Workers
- 421. First-Line Supervisors/Managers of Landscaping, Lawn Service, and Grounds
keeping Workers
- 422. Janitors and Building Cleaners
- 423. Maids and Housekeeping Cleaners
- 424. Pest Control Workers
- 425. Grounds Maintenance Workers

PRS Personal Care and Service Occupations

- 430. First-Line Supervisors/Managers of Gaming Workers
- 432. First-Line Supervisors/Managers of Personal Service Workers
- 434. Animal Trainers
- 435. Nonfarm Animal Caretakers
- 440. Gaming Services Workers
- 441. Motion Picture Projectionists
- 442. Ushers, Lobby Attendants, and Ticket Takers
- 443. Miscellaneous Entertainment Attendants and Related Workers
- 446. Funeral Service Workers
- 450. Barbers
- 451. Hairdressers, Hairstylists, and Cosmetologists
- 452. Miscellaneous Personal Appearance Workers
- 453. Baggage Porters, Bellhops, and Concierges
- 454. Tour and Travel Guides
- 455. Transportation Attendants
- 460. Child Care Workers
- 461. Personal and Home Care Aides
- 462. Recreation and Fitness Workers
- 464. Residential Advisors
- 465. Personal Care and Service Workers, All Other

SAL Sales Occupations

- 470. First-Line Supervisors/Managers of Retail Sales Workers
- 471. First-Line Supervisors/Managers of Non-Retail Sales
- 472. Cashiers
- 474. Counter and Rental Clerks
- 475. Parts Salespersons
- 476. Retail Salespersons
- 480. Advertising Sales Agents
- 481. Insurance Sales Agents
- 482. Securities, Commodities, and Financial Services Sales Agents
- 483. Travel Agents
- 484. Sales Representatives, Services, All Other
- 485. Sales Representatives, Wholesale and Manufacturing
- 490. Models, Demonstrators, and Product Promoters
- 492. Real Estate Brokers and Sales Agents
- 493. Sales Engineers
- 494. Telemarketers
- 495. Door-to-Door Sales Workers, News and Street Vendors, and Related Workers
- 496. Sales and Related Workers, All Other

OFF Office and Administrative Support Occupations

- 500. First-Line Supervisors/Managers of Office and Administrative Support Workers
- 501. Switchboard Operators, Including Answering Service
- 502. Telephone Operators
- 503. Communications Equipment Operators, All Other
- 510. Bill and Account Collectors
- 511. Billing and Posting Clerks and Machine Operators
- 512. Bookkeeping, Accounting, and Auditing Clerks
- 513. Gaming Cage Workers
- 514. Payroll and Timekeeping Clerks
- 515. Procurement Clerks
- 516. Tellers
- 520. Brokerage Clerks
- 521. Correspondence Clerks
- 522. Court, Municipal, and License Clerks
- 523. Credit Authorizers, Checkers, and Clerks
- 524. Customer Service Representatives
- 525. Eligibility Interviewers, Government Programs
- 526. File Clerks
- 530. Hotel, Motel, and Resort Desk Clerks
- 531. Interviewers, Except Eligibility and Loan
- 532. Library Assistants, Clerical
- 533. Loan Interviewers and Clerks
- 534. New Account Clerks
- 535. Order Clerks
- 536. Human Resources Assistants, Except Payroll and Timekeeping
- 540. Receptionists and Information Clerks
- 541. Reservation and Transportation Ticket Agents and Travel Clerks
- 542. Information and Record Clerks, All Other
- 550. Cargo and Freight Agents
- 551. Couriers and Messengers
- 552. Dispatchers
- 553. Meter Readers, Utilities
- 554. Postal Service Clerks
- 555. Postal Service Mail Carriers
- 556. Postal Service Mail Sorters, Processors, and Processing Machine Operators
- 560. Production, Planning, and Expediting Clerks
- 561. Shipping, Receiving, and Traffic Clerks
- 562. Stock Clerks and Order Fillers
- 563. Weighers, Measurers, Checkers, and Samplers, Recordkeeping
- 570. Secretaries and Administrative Assistants
- 580. Computer Operators
- 581. Data Entry Keyers
- 582. Word Processors and Typists
- 583. Desktop Publishers
- 584. Insurance Claims and Policy Processing Clerks
- 585. Mail Clerks and Mail Machine Operators, Except Postal Service
- 586. Office Clerks, General
- 590. Office Machine Operators, Except Computer
- 591. Proofreaders and Copy Markers
- 592. Statistical Assistants
- 593. Office and Administrative Support Workers, All Other

FFF Farming, Fishing, and Forestry Occupations

- 600. First-Line Supervisors/Managers/Contractors of Farming, Fishing, and Forestry Workers
- 601. Agricultural Inspectors

- 602. Animal Breeders
- 604. Graders and Sorters, Agricultural Products
- 605. Other Agricultural Workers
- 610. Fishers and Related Fishing Workers
- 611. Hunters and Trappers
- 612. Forest and Conservation Workers
- 613. Logging Worker

CON Construction Trades

- 620. First-Line Supervisors/Managers of Construction Trades and Extraction Workers
- 621. Boilermakers
- 622. Brickmasons, Blockmasons, and Stonemasons
- 623. Carpenters
- 624. Carpet, Floor, and Tile Installers and Finishers
- 625. Cement Masons, Concrete Finishers, and Terrazzo Workers
- 626. Construction Laborers
- 630. Paving, Surfacing, and Tamping Equipment Operators
- 631. Pile-Driver Operators
- 632. Operating Engineers and Other Construction Equipment Operators
- 633. Drywall Installers, Ceiling Tile Installers, and Tapers
- 635. Electricians
- 636. Glaziers
- 640. Insulation Workers
- 642. Painters, Construction and Maintenance
- 643. Paperhangers
- 644. Pipelayers, Plumbers, Pipefitters, and Steamfitters
- 646. Plasterers and Stucco Masons
- 650. Reinforcing Iron and Rebar Workers
- 651. Roofers
- 652. Sheet Metal Workers
- 653. Structural Iron and Steel Workers
- 660. Helpers, Construction Trades
- 666. Construction and Building Inspectors
- 670. Elevator Installers and Repairers
- 671. Fence Erectors
- 672. Hazardous Materials Removal Workers
- 673. Highway Maintenance Workers
- 674. Rail-Track Laying and Maintenance Equipment Operators
- 675. Septic Tank Servicers and Sewer Pipe Cleaners
- 676. Miscellaneous Construction and Related Workers

EXT Extraction Workers

- 680. Derrick, Rotary Drill, and Service Unit Operators, Oil, Gas, and Mining
- 682. Earth Drillers, Except Oil and Gas
- 683. Explosives Workers, Ordnance Handling Experts, and Blasters
- 684. Mining Machine Operators
- 691. Roof Bolters, Mining
- 692. Roustabouts, Oil and Gas
- 693. Helpers--Extraction Workers
- 694. Other Extraction Workers

RPR Installation, Maintenance, and Repair Workers

- 700. First-Line Supervisors/Managers of Mechanics, Installers, and Repairers
- 701. Computer, Automated Teller, and Office Machine Repairers
- 702. Radio and Telecommunications Equipment Installers and Repairers

- 703. Avionics Technicians
- 704. Electric Motor, Power Tool, and Related Repairers
- 705. Electrical and Electronics Installers and Repairers, Transportation Equipment
- 710. Electrical and Electronics Repairers, Industrial and Utility
- 711. Electronic Equipment Installers and Repairers, Motor Vehicles
- 712. Electronic Home Entertainment Equipment Installers and Repairers
- 713. Security and Fire Alarm Systems Installers
- 714. Aircraft Mechanics and Service Technicians
- 715. Automotive Body and Related Repairers
- 716. Automotive Glass Installers and Repairers
- 720. Automotive Service Technicians and Mechanics
- 721. Bus and Truck Mechanics and Diesel Engine Specialists
- 722. Heavy Vehicle and Mobile Equipment Service Technicians and Mechanics
- 724. Small Engine Mechanics
- 726. Miscellaneous Vehicle and Mobile Equipment Mechanics, Installers, and Repairers
- 730. Control and Valve Installers and Repairers
- 731. Heating, Air Conditioning, and Refrigeration Mechanics and Installers
- 732. Home Appliance Repairers
- 733. Industrial and Refractory Machinery Mechanics
- 734. Maintenance and Repair Workers, General
- 735. Maintenance Workers, Machinery
- 736. Millwrights
- 741. Electrical Power-Line Installers and Repairers
- 742. Telecommunications Line Installers and Repairers
- 743. Precision Instrument and Equipment Repairers
- 751. Coin, Vending, and Amusement Machine Servicers and Repairers
- 752. Commercial Divers
- 754. Locksmiths and Safe Repairers
- 755. Manufactured Building and Mobile Home Installers
- 756. Riggers
- 760. Signal and Track Switch Repairers
- 761. Helpers--Installation, Maintenance, and Repair Workers
- 762. Other Installation, Maintenance, and Repair Workers

PRD Production Occupations

- 770. First-Line Supervisors/Managers of Production and Operating Workers
- 771. Aircraft Structure, Surfaces, Rigging, and Systems Assemblers
- 772. Electrical, Electronics, and Electromechanical Assemblers
- 773. Engine and Other Machine Assemblers
- 774. Structural Metal Fabricators and Fitters
- 775. Miscellaneous Assemblers and Fabricators
- 780. Bakers
- 781. Butchers and Other Meat, Poultry, and Fish Processing Workers
- 783. Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders
- 784. Food Batchmakers
- 785. Food Cooking Machine Operators and Tenders
- 790. Computer Control Programmers and Operators
- 792. Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic
- 793. Forging Machine Setters, Operators, and Tenders, Metal and Plastic
- 794. Rolling Machine Setters, Operators, and Tenders, metal and Plastic
- 795. Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic
- 796. Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic

800. Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic
801. Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic
802. Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic
803. Machinists
804. Metal Furnace and Kiln Operators and Tenders
806. Model Makers and Patternmakers, Metal and Plastic
810. Molders and Molding Machine Setters, Operators, and Tenders, Metal and Plastic
812. Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic
813. Tool and Die Makers
814. Welding, Soldering, and Brazing Workers
815. Heat Treating Equipment Setters, Operators, and Tenders, Metal and Plastic
816. Lay-Out Workers, Metal and Plastic
820. Plating and Coating Machine Setters, Operators, and Tenders, Metal and Plastic
821. Tool Grinders, Filers, and Sharpeners
822. Metalworkers and Plastic Workers, All Other
823. Bookbinders and Bindery Workers
824. Job Printers
825. Prepress Technicians and Workers
826. Printing Machine Operators
830. Laundry and Dry-Cleaning Workers
831. Pressers, Textile, Garment, and Related Materials
832. Sewing Machine Operators
833. Shoe and Leather Workers and Repairers
834. Shoe Machine Operators and Tenders
835. Tailors, Dressmakers, and Sewers
836. Textile Bleaching and Dyeing Machine Operators and Tenders
840. Textile Cutting Machine Setters, Operators, and Tenders
841. Textile Knitting and Weaving Machine Setters, Operators, and Tenders
842. Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders
843. Extruding and Forming Machine Setters, Operators, and Tenders, Synthetic and Glass Fibers
844. Fabric and Apparel Patternmakers
845. Upholsterers
846. Textile, Apparel, and Furnishings Workers, All Other
850. Cabinetmakers and Bench Carpenters
851. Furniture Finishers
852. Model Makers and Patternmakers, Wood
853. Sawing Machine Setters, Operators, and Tenders, Wood
854. Woodworking Machine Setters, Operators, and Tenders, Except Sawing
855. Woodworkers, All Other
860. Power Plant Operators, Distributors, and Dispatchers
861. Stationary Engineers and Boiler Operators
862. Water and Liquid Waste Treatment Plant and System Operators
863. Miscellaneous Plant and System Operators
864. Chemical Processing Machine Setters, Operators, and Tenders
865. Crushing, Grinding, Polishing, Mixing, and Blending Workers
871. Cutting Workers
872. Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders
873. Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders
874. Inspectors, Testers, Sorters, Samplers, and Weighers

- 875. Jewelers and Precious Stone and Metal Workers
- 876. Medical, Dental, and Ophthalmic Laboratory Technicians
- 880. Packaging and Filling Machine Operators and Tenders
- 881. Painting Workers
- 883. Photographic Process Workers and Processing Machine Operators
- 884. Semiconductor Processors
- 885. Cementing and Gluing Machine Operators and Tenders
- 886. Cleaning, Washing, and Metal Pickling Equipment Operators and Tenders
- 890. Cooling and Freezing Equipment Operators and Tenders
- 891. Etchers and Engravers
- 892. Molders, Shapers, and Casters, Except Metal and Plastic
- 893. Paper Goods Machine Setters, Operators, and Tenders
- 894. Tire Builders
- 895. Helpers--Production Workers
- 896. Production Workers, All Other

TRN Transportation and Material Moving Occupations

- 900. Supervisors, Transportation and Material Moving Workers
- 903. Aircraft Pilots and Flight Engineers
- 904. Air Traffic Controllers and Airfield Operations Specialists
- 911. Ambulance Drivers and Attendants, Except Emergency Medical Technicians
- 912. Bus Drivers
- 913. Driver/Sales Workers and Truck Drivers
- 914. Taxi Drivers and Chauffeurs
- 915. Motor Vehicle Operators, All Other
- 920. Locomotive Engineers and Operators
- 923. Railroad Brake, Signal, and Switch Operators
- 924. Railroad Conductors and Yardmasters
- 926. Subway, Streetcar, and Other Rail Transportation Workers
- 930. Sailors and Marine Oilers
- 931. Ship and Boat Captains and Operators
- 933. Ship Engineers
- 934. Bridge and Lock Tenders
- 935. Parking Lot Attendants
- 936. Service Station Attendants
- 941. Transportation Inspectors
- 942. Other Transportation Workers
- 950. Conveyor Operators and Tenders
- 951. Crane and Tower Operators
- 952. Dredge, Excavating, and Loading Machine Operators
- 956. Hoist and Winch Operators
- 960. Industrial Truck and Tractor Operators
- 961. Cleaners of Vehicles and Equipment
- 962. Laborers and Freight, Stock, and Material Movers, Hand
- 963. Machine Feeders and Off Bearers
- 964. Packers and Packagers, Hand
- 965. Pumping Station Operators
- 972. Refuse and Recyclable Material Collectors
- 973. Shuttle Car Operators
- 974. Tank Car, Truck, and Ship Loaders
- 975. Material Moving Workers, All Other

MIL Military Specific Occupations

- 980. Military Officer Special and Tactical Operations Leaders/Managers
- 981. First-Line Enlisted Military Supervisors/Managers
- 982. Military Enlisted Tactical Ops and Air/Weapons Specialists and Crew members
- 983. Military, Rank Not Specified (Census only)

999. DK; NA; Don't know; Not ascertained

*Source: U.S. Census Bureau, Demographic Surveys Division,
Created: August 7 2001*

B3. Industry Codes

Equivalent numeric codes follow the alphabetic codes. Either code may be used, depending on the processing method. Abbreviation "pt" means "part" and "n.e.c." means "not elsewhere classified."

AGRICULTURE, FORESTRY, FISHING, AND HUNTING

- 017. Crop production
- 018. Animal production
- 019. Forestry except logging
- 027. Logging
- 028. Fishing, hunting, and trapping
- 029. Support activities for agriculture and forestry

MINING

- 037. Oil and gas extraction
- 038. Coal mining
- 039. Metal ore mining
- 047. Nonmetallic mineral mining and quarrying
- 048. Not specified type of mining
- 049. Support activities for mining

UTILITIES

- 057. Electric power generation transmission and distribution
- 058. Natural gas distribution
- 059. Electric and gas and other combinations
- 067. Water, steam, air-conditioning, and irrigation systems
- 068. Sewage treatment facilities
- 069. Not specified utilities

CONSTRUCTION

- 077. Construction

MANUFACTURING

- 107. Animal food, grain, and oilseed milling
- 108. Sugar and confectionery products
- 109. Fruit and vegetable preserving and specialty food manufacturing
- 117. Dairy product manufacturing
- 118. Animal slaughtering and processing
- 119. Retail bakeries
- 127. Bakeries except retail
- 128. Seafood and other miscellaneous foods n.e.c.
- 129. Not specified food industries
- 137. Beverage manufacturing
- 139. Tobacco manufacturing
- 147. Fiber, yarn, and thread mills
- 148. Fabric mills, except knitting
- 149. Textile and fabric finishing and coating mills
- 157. Carpets and rugs manufacturing
- 159. Textile product mills except carpets and rugs
- 167. Knitting mills

168. Cut and sew apparel manufacturing
169. Apparel accessories and other apparel manufacturing
177. Footwear manufacturing
179. Leather tanning and products, except footwear manufacturing
187. Pulp, paper, and paperboard mills
188. Paperboard containers and boxes
189. Miscellaneous paper and pulp products
199. Printing and related support activities
207. Petroleum refining
209. Miscellaneous petroleum and coal products
217. Resin, synthetic rubber and fibers, and filaments manufacturing
218. Agricultural chemical manufacturing
219. Pharmaceutical and medicine manufacturing
227. Paint, coating, and adhesives manufacturing
228. Soap, cleaning compound, and cosmetic manufacturing
229. Industrial and miscellaneous chemicals
237. Plastics product manufacturing
238. Tire manufacturing
239. Rubber products, except tires, manufacturing
247. Pottery, ceramics, and related products manufacturing
248. Structural clay product manufacturing
249. Glass and glass product manufacturing
257. Cement, concrete, lime, and gypsum product manufacturing
259. Miscellaneous nonmetallic mineral product manufacturing
267. Iron and steel mills and steel product manufacturing
268. Aluminum production and processing
269. Nonferrous metal, except aluminum, production and processing
277. Foundries
278. Metal forgings and stampings
279. Cutlery and hand tool manufacturing
287. Structural metals and tank and shipping container manufacturing
288. Machine shops; turned product; screw nut and bolt manufacturing
289. Coating, engraving, heat treating and allied activities
297. Ordnance
298. Miscellaneous fabricated metal products manufacturing
299. Not specified metal industries
307. Agricultural implement manufacturing
308. Construction mining and oil field machinery manufacturing
309. Commercial and service industry machinery manufacturing
317. Metalworking machinery manufacturing
318. Engines, turbines, and power transmission equipment manufacturing
319. Machinery manufacturing, n.e.c.
329. Not specified machinery manufacturing
336. Computer and peripheral equipment manufacturing
337. Communications, audio, and video equipment manufacturing
338. Navigation, measuring, electrometrical, and control instruments manufacturing
339. Electronic component and product manufacturing, n.e.c.
347. Household appliance manufacturing
349. Electrical machinery, equipment, and supplies manufacturing, n.e.c.
357. Motor vehicles and motor vehicle equipment manufacturing
358. Aircraft and parts manufacturing
359. Aerospace product and parts manufacturing
367. Railroad rolling stock manufacturing
368. Ship and boat building
369. Other transportation equipment manufacturing
377. Sawmills and wood preservation

- 378. Veneer, plywood, and engineered wood product manufacturing
- 379. Prefabricated wood buildings and mobile homes manufacturing
- 387. Miscellaneous wood product manufacturing
- 389. Furniture and fixtures
- 396. Medical equipment and supplies manufacturing
- 397. Toys, amusement, and sporting goods manufacturing
- 398. Miscellaneous manufacturing, n.e.c.
- 399. Not specified manufacturing industries

WHOLESALE TRADE

- 407. Motor vehicles, parts and supplies wholesalers
- 408. Furniture and home furnishing wholesalers
- 409. Lumber and other construction materials wholesalers
- 417. Professional and commercial equipment and supplies Wholesalers
- 418. Metals and minerals, except petroleum, wholesalers
- 419. Electrical goods wholesalers
- 426. Hardware, plumbing and heating equipment, and supplies wholesalers
- 427. Machinery, equipment, and supplies wholesalers
- 428. Recyclable material wholesalers
- 429. Miscellaneous durable goods wholesalers
- 437. Paper and paper product wholesalers
- 438. Drugs, sundries, and chemical and allied product Wholesalers
- 439. Apparel, fabrics, and notions wholesalers
- 447. Groceries and related product wholesalers
- 448. Farm product raw material wholesalers
- 449. Petroleum and petroleum product wholesalers
- 456. Alcoholic beverage wholesalers
- 457. Farm supplies wholesalers
- 458. Miscellaneous nondurable goods wholesalers
- 459. Not specified wholesale trade

RETAIL TRADE

- 467. Automobile dealers
- 468. Other motor vehicle dealers
- 469. Auto parts, accessories, and tire stores
- 477. Furniture and home furnishings stores
- 478. Household appliance stores
- 479. Radio, TV, and computer stores
- 487. Building material and supplies dealers
- 488. Hardware stores
- 489. Lawn and garden equipment and supplies stores
- 497. Grocery stores
- 498. Specialty food stores
- 499. Beer, wine, and liquor stores
- 507. Pharmacies and drug stores
- 508. Health and personal care, except drug, stores
- 509. Gasoline stations
- 517. Clothing and accessories, except shoe, stores
- 518. Shoe stores
- 519. Jewelry, luggage, and leather goods stores
- 527. Sporting goods, camera, and hobby and toy stores
- 528. Sewing, needlework and piece goods stores
- 529. Music stores
- 537. Book stores and news dealers
- 538. Department stores
- 539. Miscellaneous general merchandise stores
- 547. Retail florists

- 548. Office supplies and stationary stores
- 549. Used merchandise stores
- 557. Gift, novelty, and souvenir shops
- 558. Miscellaneous retail stores
- 559. Electronic shopping and mail-order houses
- 567. Vending machine operators
- 568. Fuel dealers
- 569. Other direct selling establishments
- 579. Not specified retail trade

TRANSPORTATION AND WAREHOUSING

- 607. Air transportation
- 608. Rail transportation
- 609. Water transportation
- 617. Truck transportation
- 618. Bus service and urban transit
- 619. Taxi and limousine service
- 627. Pipeline transportation
- 628. Scenic and sightseeing transportation
- 629. Services incidental to transportation
- 637. Postal Service
- 638. Courier and messengers
- 639. Warehousing and storage

INFORMATION

- 647. Newspaper publishers
- 648. Publishing except newspapers and software
- 649. Software publishing
- 657. Motion pictures and video industries
- 659. Sound recording industries
- 667. Radio and television broadcasting and cable
- 668. Wired telecommunications carriers
- 669. Other telecommunication services
- 677. Libraries and archives
- 678. Other information services
- 679. Data processing services

FINANCE AND INSURANCE

- 687. Banking and related activities
- 688. Savings institutions, including credit unions
- 689. Non-depository credit and related activities
- 697. Securities, commodities, funds, trusts, and other financial investments
- 698. Insurance carriers and related activities

REAL ESTATE AND RENTAL AND LEASING

- 707. Real estate
- 708. Automotive equipment rental and leasing
- 717. Video tape and disk rental
- 718. Other consumer goods rental
- 719. Commercial, industrial, and other intangible assets rental and leasing

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

- 727. Legal services
- 728. Accounting, tax preparation, bookkeeping and payroll services
- 729. Architectural, engineering, and related services
- 737. Specialized design services

- 738. Computer systems design and related services
- 739. Management, scientific and technical consulting services
- 746. Scientific research and development services
- 747. Advertising and related services
- 748. Veterinary services
- 749. Other professional, scientific and technical services

MANAGEMENT, ADMINISTRATIVE AND SUPPORT, AND WASTE MANAGEMENT SERVICES

- 757. Management of companies and enterprises
- 758. Employment services
- 759. Business support services
- 767. Travel arrangement and reservation services
- 768. Investigation and security services
- 769. Services to buildings and dwellings
- 777. Landscaping services
- 778. Other administrative and other support services
- 779. Waste management and remediation services

EDUCATIONAL SERVICES

- 786. Elementary and secondary schools
- 787. Colleges and universities, including junior colleges
- 788. Business, technical, and trade schools and training
- 789. Other schools, instruction, and educational services

HEALTH CARE AND SOCIAL ASSISTANCE

- 797. Offices of physicians
- 798. Offices of dentists
- 799. Office of chiropractors
- 807. Offices of optometrists
- 808. Offices of other health practitioners
- 809. Outpatient care centers
- 817. Home health care services
- 818. Other health care services
- 819. Hospitals
- 827. Nursing care facilities
- 829. Residential care facilities, without nursing
- 837. Individual and family services
- 838. Community food and housing, and emergency services
- 839. Vocational rehabilitation services
- 847. Child day care services

ARTS, ENTERTAINMENT, AND RECREATION

- 856. Independent artists, performing arts, spectator sports, and related industries
- 857. Museums, art galleries, historical sites, and similar Institutions
- 858. Bowling centers
- 859. Other amusement, gambling, and recreation industries

ACCOMODATIONS AND FOOR SERVICES

- 866. Traveler accommodation
- 867. Recreational vehicle parks and camps, and rooming and boarding houses
- 868. Restaurants and other food services
- 869. Drinking places, alcoholic beverages

OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)

- 877. Automotive repair and maintenance

- 878. Car washes
- 879. Electronic and precision equipment repair and maintenance
- 887. Commercial and industrial machinery and equipment repair and maintenance
- 888. Personal and household goods repair and maintenance
- 889. Footwear and leather goods repair
- 897. Barber shops
- 898. Beauty salons
- 899. Nail salons and other personal care services
- 907. Dry cleaning and laundry services
- 908. Funeral homes, cemeteries and crematories
- 909. Other personal services
- 916. Religious organizations
- 917. Civic, social, advocacy organizations, and grantmaking and giving services
- 918. Labor unions
- 919. Business, professional, political, and similar Organizations
- 929. Private households

PUBLIC ADMINISTRATION AND ACTIVE DUTY MILITARY

- 937. Executive offices and legislative bodies
- 938. Public finance activities
- 939. Other general government and support
- 947. Justice, public order, and safety activities
- 948. Administration of human resource programs
- 949. Administration of environmental quality and housing programs
- 957. Administration of economic programs and space research
- 959. National security and international affairs
- 967. U.S. Army
- 968. U.S. Air Force
- 969. U.S. Navy
- 977. U.S. Marines
- 978. U.S. Coast Guard
- 979. U.S. Armed Forces, branch not specified
- 987. Military Reserves or National Guard
- 999. DK; NA; Don't know; Not ascertained

C. State and Country Codes

C1. STATES

- 01. Alaska (AK)
- 02. Alabama (AL)
- 53. American Samoa, Guam
- 03. Arizona (AZ)
- 04. Arkansas (AR)
- 05. California (CA)
- 06. Colorado (CO)
- 07. Connecticut (CT)
- 08. Delaware (DE)
- 51. Dist. of Columbia (DC)
- 09. Florida (FL)
- 10. Georgia (GA)
- 53. Guam (GU)
- 11. Hawaii (HI)
- 12. Idaho (ID)
- 13. Illinois (IL)
- 14. Indiana (IN)
- 15. Iowa (IA)
- 16. Kansas (KS)

17. Kentucky (KY)
18. Louisiana (LA)
19. Maine (ME)
20. Maryland (MD)
21. Massachusetts (MA)
22. Michigan (MI)
23. Minnesota (MN)
24. Mississippi (MS)
25. Missouri (MO)
26. Montana (MT)
27. Nebraska (NE)
28. Nevada (NV)
29. New Hampshire (NH)
30. New Jersey (NJ)
31. New Mexico (NM)
32. New York (NY)
33. North Carolina (NC)
34. North Dakota (ND)
35. Ohio (OH)
36. Oklahoma (OK)
37. Oregon (OR)
38. Pennsylvania (PA)
52. Puerto Rico (PR)
39. Rhode Island (RI)
40. South Carolina (SC)
41. South Dakota (SD)
42. Tennessee (TN)
43. Texas (TX)
44. Utah (UT)
45. Vermont (VT)
53. (U.S.) Virgin Islands
46. Virginia (VA)
47. Washington (WA)
51. Washington, D.C. (DC)
48. West Virginia (WV)
49. Wisconsin (WI)
50. Wyoming (WY)

C2. OTHER U.S.

51. District of Columbia; Washington, D.C.
52. Puerto Rico
53. Guam, American Samoa, U.S. Virgin Islands, Panama Canal Zone
59. USA, NA which state

C3. OTHER COUNTRIES

97. Other Country

98. DK
99. NA

D. 2020 Production Data Model (DM) Changes

DM Version	Section	Field Name	Summary
7	A	A020TSameSpP	<p>Problem: Respondents are getting into Section S in error when they are still married to same SPP as previous wave but consider themselves separated. This was due to a change in the A020TSameSpP_A assignment. In 2016 and 2018 if an R reported that they were separated at A034, A020 stayed "1." In 2020, if the R is separated, A020 now says "5" which results in the R getting into section S when in previous waves that would not have.</p> <p>Fix: The A020 assignment has been revised to work as it did in 2016 and 2018 (if R reports that they were separated at A034, A020 stays "1.").</p>
7	A	A067_CtyNHome	<p>Problem: When completing interviews, A067, A068, and A251 are clearing out.</p> <p>Fix: Added KEEP statements to these fields so they are no longer cleared out.</p>
4	A	A166_A020TSameSpP_A	<p>Problem: If respondent reports their past wave partner is now their spouse, the question fills are not updating to refer to them as respondents spouse.</p> <p>Fix: Revised fill rules.</p>
2	A	A251	<p>Problem: The City/State/Zip lookup, Don't Know was displaying as an option for some cities that have multiple zip codes, but not all.</p> <p>Fix: Added an instruction to select the closest match to this City/State combination and make a comment that respondent does not know zip code.</p>
9	A	R3_X017ARLName	<p>Problem: There is a bad fill for spouse/partner since we have not yet collected their name.</p> <p>Fix: Programmed to use (spouse/partner) parenthetical instead of actual name.</p>
5	A2	X056AresStat	<p>Problem: There are two cases where x061="32. I don't know this person" but x056 was not assigned "7. Delete."</p> <p>Fix: Changed household member logic to assign x056=7. Delete when x061="32. I don't know this person"</p>
13	All	B000	<p>Problem: If a respondent presses "Home" during a Web interview, they are pushed back to the beginning of section B, and have to key through the whole survey again.</p> <p>Fix: This has been fixed so that nothing happens when the Home key is pressed.</p>
5	B	B055_	<p>Problem: Proxy text should say "We are interested in changes to his/her marital status..." It currently says "changes to your marital status."</p> <p>Fix: Corrected proxy text as specified.</p>

DM Version	Section	Field Name	Summary
13	C	C011	<p>Problem: There should be a back assignment to C010 when C011=4 or C011=6: C011=4, assign 4 to C010; C011=6, assign 6 to C010. They should then skip out of the rest of the diabetes questions, to C018 BP.</p> <p>Fix: Revised logic for diabetes follow-ups when C011=4 or 6.</p>
7	C	C139	<p>Problem: From field interviewer: The question "How much do you weigh?" does not require an answer to continue to the next question. If an interviewer presses enter by mistake twice, the question will be passed without an answer.</p> <p>Fix: Changed field type, and now empty is not allowed in INTERVIEWER ADMINISTERED.</p>
13	C	C210	<p>Problem: Code 4 should only be displayed if it's the same reporter as last wave and R reported having dementia, senility or memory impairment, but was displayed when reporter was not the same as last wave.</p> <p>Fix: Changed logic so code 4 is not displayed unless same reporter as last wave and R was preloaded with dementia, senility or memory impairment.</p>
4	C	C223	<p>Problem: [vol] was showing in code in WEB under certain conditions</p> <p>Fix: Dropped vol from code for WEB</p>
2	C	C223_VigAct	<p>Problem: [Vol] was missing from code 7 for INTERVIEWER ADMINISTERED interviews.</p> <p>Fix: Added missing [Vol] to code 7 for INTERVIEWER ADMINISTERED interviews.</p>
6	C	C252_	<p>Fix: New definitions for Menopause be added to the questionnaire added at C251 and C252.</p>
9	C	C253	<p>Problem: The drop down at this question was presenting issues in both modes: interviewers were unable to enter DK/RF when first arriving at the question, and Web respondents using a small screen were unable to see past the first option or two in the drop down.</p> <p>Fix: Changed this to a coded question for both modes.</p>
8	C	C273	<p>Problem: There is a discrepancy between the B & A and the programmed skip logic for Question C273. The B & A indicates a skip if "C185 not 1" (which would include 5 and blank). However, the programming only skips if C185 = 5 and does not skip if C185 is blank.</p> <p>Fix: This is working as intended, but needed to update the C273 BP in the B&A to reflect that there is an assignment.</p>
9	C	C285	<p>Problem: If someone comes in who has diabetes (z102=1 and z281=1) they aren't asked the diabetes questions. The way it is programmed we assign c010=1 but then they get skipped out of the follow-up at c285. This meant when we went to go make preload for the next year, there were a whole bunch of respondents where c285=. which meant the preload for z281 the next year was missing (when it should have been =1).</p> <p>Fix: Added an assignment at the c285 BP to assign c285=1 if z281=1.</p>

DM Version	Section	Field Name	Summary
9	C	C288	Problem: Code 7 is not showing for INTERVIEWER ADMINISTERED. Fix: Fixed so code 7 shows for all but Web.
10	COV1	W550	Problem: Needed to adjust the rules to allow WEB respondents who were assigned enhanced face-to-face (EFTF) as preferred mode to enter the COVID section. Fix: Changed rules to allow E-FTF WEB respondents into the COVID section. This also included optimization of some question text and code frames to work for WEB respondents.
10	COV1	W553	Problem: Needed to add condition question text based on new question W644 asking how many tests Fix: Added conditional text Was: Did the test indicate that you had the virus? Now: IF W644 =1 OR W644= 8 or 9: Did the test indicate that you had the virus? IF W644 =2: Did any of the tests indicate that you had the virus?
10	COV1	W554	Problem: Needed to add conditional question text. Fix: Added new conditional text: Was: When did you get that test? Now: IF W644 = 1 OR 8 OR 9: When did you get that test? IF W644= 2 AND W553=1: What was the date of that positive test? INSTR: Enter the date of the first positive test if there were multiple positive tests. OTHERWISE: What was the date of the most recent test?
11	COV1	W550	Problem: All Web respondents, not just E-FTF Web respondents were getting the COVID section during testing.

DM Version	Section	Field Name	Summary
			Fix: All of the cases tested actually were E-FTF, so that's why they were getting the COVID section (correctly). Re-implemented code to ask the COVID section of E-FTF Web respondents.
6	COV1	W550-W643	Problem: To capture valuable information about affects of the coronavirus pandemic we will add new COVID-19 section to the main survey. This new section will be asked after section D and will be administered in English and Spanish for Core self report and living proxy interviews (no Web or Exit).
10	COV1	W644	Problem: New question about how many tests for COVID R took needed to be added. Fix: Added new question: Have you been tested only once, or multiple times? 1. ONCE 2. MULTIPLE TIMES 8. DON'T KNOW 9. REFUSE
12	COV1	W552	Problem: Since the COVID Antibody Test kits are being sent out to all respondents, we want to add an instruction about what the interviewer should do if the respondent asks if they should count the Antibody test. Fix: Added new instruction: INSTR: If the respondent mentions participating in the HRS COVID Antibody Study, ask about testing aside from that.
12	COV1	W554	Problem: Since the COVID Antibody Test kits are being sent out to all respondents, we want to add an instruction about what the interviewer should do if the respondent asks if they should count the Antibody test. Fix: Added new instruction: If the respondent mentions participating in the HRS COVID Antibody Study, ask about testing dates aside from that.
11	COV1	W569	Problem: The code text for "dr. said it was up to me" is missing on screen for INTERVIEWER ADMINISTERED and WEB. Fix: Added code back for both INTERVIEWER ADMINISTERED and WEB.
7	COV1	W575	Problem: Need to add a select all that apply instruction for W575, W632, W635, W638, and W641. Fix: Select all added
7	COV1	W578_	Problem: W578 is limited to ask only people who say they know someone who was diagnosed. Fix: Adjusted code so W578 is asked of all respondents.
8	COV1	W580	Problem: Misspelling "reschedule" on question W580. It is missing the "c"

DM Version	Section	Field Name	Summary
			Fix: Corrected typo
8	COV1	W588	Problem: W588 has the word "other" repeated 2x ("other other") Fix: Removed extra "other"
8	COV1	W590	Problem: This question asks if the respondent and their partner received the payment, but there is no probe for if they just say 'yes' instead of identifying which of them received payment. Fix: Added probe instruction: Instr: If necessary, probe: Who received it? INSTR: IF NECESSARY, PROBE: Who received it?
13	COV1	W590	Problem: Now that there is a second round of stimulus checks for COVID economic relief, we need to update the question text. Fix: Revised to reflect 2 nd stimulus check. Now: Because of the coronavirus crisis, earlier this year in late December 2020 and early January 2021 many families received an economic impact payment of up to twelve hundred dollars for individuals, twenty-four hundred dollars for couples, and five hundred dollars for each dependent child six hundred dollars for individuals, twelve hundred dollars for couples, and six hundred dollars for each interviewer dependent child. Have you [or your spouse/partner] received this payment? From update at DM10: Because of the coronavirus crisis, most many families will receive earlier this year many families received an economic impact payment of up to twelve hundred dollars for individuals, twenty-four hundred dollars for couples, and five hundred dollars for each dependent child. Have you [or your spouse/partner] received this payment? Original wording: Because of the coronavirus crisis, most many families will receive an economic impact payment of up to twelve hundred dollars for individuals, twenty-four hundred dollars for couples, and five hundred dollars for each interviewer dependent child. Have you [and your spouse/partner] received this payment?
10	COV1	W596	Problem: Needed "Select all" instruction.

DM Version	Section	Field Name	Summary
			Fix: Added instruction for both INTERVIEWER ADMINISTERED and WEB.
10	COV1	W623	<p>Problem: Respondents are answering "no" to "no material hardship" or saying "no to all" after the code options are read to them, which creates a double negative for the "no material hardship" option and is confusing as a result. Suggested a change in wording.</p> <p>Fix: Added clarifying instruction/probe:</p> <p>INST: No hardship means that R has not experienced any hardships. If R answers 'No' when you read out code 7, probe: Do you mean that you did not experience any hardships at all?</p>
10	COV1	W642	<p>Problem: Needed to add new question at the end of the section for all who get the COVID section except proxies about wearing masks.</p> <p>Fix: New question added:</p> <p>How often would you say that people in your area wear masks that cover their nose and mouth when in stores and similar locations?</p> <p>INSTR: PLEASE READ THE RESPONSE OPTIONS TO R</p> <ol style="list-style-type: none"> 1. MOST OF THE TIME 2. MORE THAN HALF THE TIME 3. HALF THE TIME 4. LESS THAN HALF THE TIME 5. RARELY
10	COV1	W646	<p>Problem: Needed to add new question at the end of the section for all who get the COVID section except proxies about likelihood of getting vaccine.</p> <p>Fix: New question added:</p> <p>It's possible there will be a vaccine for coronavirus in the next several months. How likely would you be to take a vaccine if it were available to you like a flu shot?</p> <p>INSTR: PLEASE READ THE RESPONSE OPTIONS TO R.</p> <ol style="list-style-type: none"> 1. VERY LIKELY 2. SOMEWHAT LIKELY 3. NOT VERY LIKELY 4. NOT AT ALL LIKELY

DM Version	Section	Field Name	Summary
13	COV1	W646	<p>Problem: Now that COVID vaccines are available, we need to revise the question text at W646 for both INTERVIEWER ADMINISTERED and WEB. In addition, add a few new questions about vaccinations preceding W646.</p> <p>Fix: Revised W646 question text and added 3 questions preceding it (W670-W673).</p> <p>W646 now: How likely are you to take a coronavirus vaccine when it becomes available to you?</p> <p>It's possible there will be a vaccine for coronavirus in the next several months. How likely would you be to take a vaccine if it were available to you like a flu shot?</p> <p>INSTR: PLEASE READ THE RESPONSE OPTIONS TO R.</p> <p>Original from DM10: It's possible there will be a vaccine for coronavirus in the next several months. How likely would you be to take a vaccine if it were available to you like a flu shot?</p> <p>INSTR: PLEASE READ THE RESPONSE OPTIONS TO R.</p>
10.5	COV1, EOI	W550, W335	<p>Problem: All web respondents are getting the COVID section during testing.</p> <p>Fix: Commented out code that allowed Web EFTF cases into the COVID and EOI.</p>
12	D	D157	<p>Problem: Due to the 2020 election, we need to allow interviewers to mark respondents answer as 'correct' if they answer either Trump or Biden if election results are not decided or if Biden wins on November 3.</p> <p>Fix: Revised D157 and D158 instructions to accept both presidential and vice presidential nominees as correct answers.</p>
13	D	D157, D158	<p>Problem: Since Biden will be the president Jan 20, need to change the president/vice president answers.</p> <p>Fix: Replaced Trump for Biden and Pence for Harris.</p>
4	D	D170	<p>Problem: There was a KEEP statement in section D that was added to deal with mode switches that was making it so count variables were set to zero instead of null for proxy cases.</p> <p>Fix: A condition was added to only use the KEEP statement for mode switches.</p>
9	D	D338_AnimalString	<p>Problem: When RD338 only has 1s RD198 (Animal Mistakes number) should be assigned 0. Right now, RD198=. for these cases.</p> <p>Fix: D198 programmed to equal zero when D338 only has 1s entered.</p>

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12	E	E030	<p>Problem: An issue with X054 always missing for HH members in the loop. This is an issue because without x054, you cannot link the response with the correct HH member.</p> <p>Fix: Revised logic so PNDX is recorded.</p>
7	E	E105_FinHelpToRel	<p>Problem: In Section E asking about financial help to other people such as friends or family such as sibling or nieces and nephews, the question did not have a statement about do not include parents, so respondent included financial help to parents. Later questions then asked about is your mother living, etc. and questions asked about financial help to parents. Usually parents are specifically excluded in the help to friends and other family questions.</p> <p>Fix: For E105 and E111, revised the rules for the "excluding parents" fill so that it shows up if parent(s) are preloaded as alive AND also if X013 or X015 is missing.</p>
8	E	E120	<p>Problem: who is getting E120 Assist. (1) there were 1,236 cases where E120=1 when the R is not a family R. (2) Exits are also incorrectly skipping the assist question (E120).</p> <p>Fix: Added condition to skip non-family respondents, and determined we do not want to ask this question of Exit respondents either, so also skipping them as well.</p>
6	EOI	V900_LeaveBehind	<p>Problem: Due to COVID no interviews were done. The Leave Behind Blaise questions (V900 and V990) were dropped for all FTFE respondents.</p>
5	EOI	V990_LeaveBehindID	<p>Changed program logic so V990 is only displayed if it is empty.</p>
8	EOI	W335	<p>Problem: The final COVID question allowing respondents to make general comments or how they are doing is difficult to administer when doing proxy interview.</p> <p>Fix: Skipped all proxies over this question because they were never intended to get it.</p>
10	EOI	W335	<p>Problem: Needed to revise rules to allow EFTF Web respondents to be asked W335 and new question W336.</p> <p>Fix: Revised rules to allow EFTF Web respondents to be asked W335 and new question W336, and adjusted text for these respondents.</p>
6	EOI	W335_COVIDExperience	<p>Problem: Add a new question at the end of the instrument (after modules, before the interviewer Thumbnail section).</p> <p>Fix: Added new question W335_COVIDExperience</p>
6	EOI	W335_COVIDExperience	<p>Problem: Add interviewer instruction so it is clear interviewer should stay on this screen while the respondent talks freely and that the interviewer should not enter 1. Yes or 5. No until R is done speaking.</p> <p>Fix: Added 2 new instructions: INSTR: Remain on this screen while R speaks freely. You may probe for A/E.</p>

DM Version	Section	Field Name	Summary
			INSTR: When R is finished speaking, select one of the below responses.
10	EOI	W336	Problem: There is a bad fill for spouse/partner since we have not yet collected their name. Fix: Programmed to use (spouse/partner) parenthetical instead of name for spouses/partners.
8	F	F113	Problem: The descriptor at F113 is slightly misleading. It should be "Which Parent" instead of "Which Sib". Fix: Revised descriptor as specified.
8	G	G015, G022	Problem: Able to enter value other than response options shown Fix: This is because exit has these codes - they do not display in Core, but you can select them. Added signal for when they are selected in core.
8	G	G020	Problem: Respondents are skipping over G020 and all the way to G040 when they should not be. Fix: Revised rules so G021-G036 are no longer erroneously skipped.
8	G	G020	Problem: Should not get G020 when G016=5. Fix: Fixed flow so we no longer get G020 when G016=5.
7	G	G020_HelpWalk	Problem: Respondents who had some difficulty with mobility and no difficulty dressing were getting questions G020 - G036 when they shouldn't have. Fix: Revised rules so these respondents no longer get the additional questions.
8	G	G037	Problem: 14 respondents missing G037 who should have gotten it. They are all living proxy respondents. Based on G037 BP all living proxies should get G037. Fix: Conditions for asking question reordered so all living proxies get it.
6	G	G176_G032_ADLHlprTemp	Problem: Some respondents who reported they received help at one ADL did not get the ADL follow up loop at G176. Fix: Broadened who should get G176, but users need to note more people will get this question now than in previous waves.
4	H	H101_SeniorComplex	Problem: Rules for asking H101 need to be revised and a new intro needs to be added to H102. Fix: Changed the H101 ask rules and added a new intro to H102. New intro: Earlier you said your house or apartment is part of a retirement community, senior citizens' housing, assisted living, or some other type of housing that offers services for older adults (or someone with a disability).
5	H	H101_SeniorComplex	Problem: There was a flow issue where H101 was erroneously being skipped.

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			Fix: Changed logic so these cases get H101 as they should.
5	H	H192_AssistH	Problem: Received Section H assist question in Web. Fix: Added assist skip for Web.
6	I	I800_FTF	Problem: Because in-person interviews were not conducted due to COVID, no one is getting the Physical Measures/Bio sequence. We want to make sure that FTFE respondents selected to be Phone interviews skip properly, otherwise we'll need to comment out section I. Fix: No fix needed. respondents where X090 =3, but I800=1-Phone are skipping fine.
7	J	J005	Problem: Many people responded 7 (other, specify) to J005 and then mentioned that they were temporary furloughed due to COVID-19 when giving a detailed answer to J006. Fix: Added furlough text to existing "Temporarily laid off" code.
10	J	J045	Problem: Questions were potentially confusing for temporarily laid off/furloughed respondents, so their responses sometimes led them down the wrong path. Fix: Added new question text at J045 for temporarily laid off/furloughed respondents.
11	J	J058	Problem: Empties at J058 are falling through to J059, which can cause a lot of confusion for the respondent. They should skip the same as DK/RFs. Fix: Programmed empties at J058 to skip the same as DK/RFs.
5	J	J166	Problem: "What kind of business do you work in -- that is what do they make or do at your work? What industry do you currently work in?" The question seems a bit confusing when asked twice like this. Fix: For WEB, dropped the second clarification version.
2	J and Q	W777	Problem: An issue was discovered where the PW wave year variable (A114) was set to the wrong year for the 2020 wave, which means we haven't been asking the full range of "eligible" years in DM1. Fix: Changed the A114 (PW wave year) from the incorrect value of 2016 to the correct value of 2018.
7	J2	W427	Problem: Background assignments to W065, W425, W426, W427, and W428 can potentially stop Web interviews when previous answers are changed. Fix: These codes were hidden, and though interviewers could change to a different code because they have an answer box displaying the assigned code, Web just had the background assignment without any way of a respondent to know it was there.

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			For both INTERVIEWER ADMINISTERED and WEB, now displaying the assignment code in the codeframe (only) when an assignment was made.
4	J3	J959	Problem: Special answers were not skipping correctly for WEB. Fix: Fixed special answer skips for J568, J570, J572, J959, J574, and J576
13	N	N277	Problem: Incorrectly getting N277 when N274=7. Fix: Corrected flow so R skips N277 when N274=7.
3	N	N281_MonthStart	Problem: Month field was not coming up for all years within the last 2 years in CAPI. Fix: Revised rules so month field displays when it should.
4	N	N451_CARECAIDCONSE NT	Problem: There were several cases where Z113 and Z277 were missing, but the respondent did not report having Medicaid or Medicare. We still want to ask for permissions because perhaps they do not know they have it or may have it in the future. Fix: Dropped condition that respondent had to have or has Medicaid or Medicare to get the Medicare/Medicaid consent question.
5	N	N451_CARECAIDCONSE NT	Problem: Revised the ask rules for N451, then changed them back. Fix: Changed the conditions back to ask if (Z113 NOT 1 OR 9) OR (Z277 NOT 1 OR 9) AND (N001=1 OR N005=1 OR N343 = 1 OR 2).
3	N	N454	Problem: We accidentally added a duplicate field, N454 (it existed as N433_N454). Fix: Changed duplicate field name to N473, leaving the old field N433_N454 alone.
8	N	N483	Problem: The third answer option did not fit with the other 2 options. Fix: Changed 3 rd response option from "more than 20 times" to "Más de 20 años"
7	P	P016	Problem: This wave were reported a number of problems relating to a set of questions from P016 to P182 that ask about the likelihood of working in the future. While examining the current Blaise code we realized that no respondents older than 61 can get P199, P181, and P182 and that there are other issues with the skips in this series. Who gets what question depends on the respondent's age, work status and answers to earlier questions in this set. The series includes questions P016, P017, P018, P198, P199, P181, P182, and generally takes the form of "What are the chances you will be doing any work/work full time at X age?" Fix: Modifications were made to the program so that it conforms to intended design.
3	P	P017	Problem: P017 was being skipped in error when respondent is currently working (J021=1). Fix: Added J021=1 to the condition for asking P017.

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4	P	P018_	<p>Problem: The rules for asking P018 don't include when P017 is missing.</p> <p>Fix: Revised to Ask if age<65 and P016 is 1-100 and (P017 is 1-100 or if P017 is empty)</p>
7	P	P018_	<p>Problem: P018 should not be skipped if J020=1 but it is skipped.</p> <p>Fix: Reworked flow for P016 - P182.</p>
3	P	P032	<p>Problem: Question and definition phrasing did not match.</p> <p>Fix: Dropped 'or other long-term health care facility' from the definition.</p>
3	P	P180	<p>Problem: Percent chance market will go down by 20% or more (P180) was not being asked when percent chance market will be up at all question was zero (P047=0), but should be.</p> <p>Fix: Revised so P180 is asked when P047=0.</p>
10	P	P181	<p>Problem: A discrepancy was found in the hard-coding of this question between modes of language. The Spanish-speaking respondents were being asked about the likelihood or retirement at 65, where the English speakers were being asked about it at age 70.</p> <p>Fix: Changed 65 to 70 in Spanish to match the English.</p>
4	P	P198_	<p>Problem: Age limit is off by one year in text inconsistent in the data: 7/8 skipped as they should be, 1 asked even though should not have been asked.</p> <p>Fix: Revised condition so respondents under 62 get the question, 62 and older do not.</p>
5	T	T259	Added apostrophes after name fill.
7	U	U020_minCurWave U021_maxCurWave	<p>Problem: An issue with min and max values that are stored at U020 and U021. U020 is the min asset value in current wave and U021 is the max asset value in current wave. When an R leaves the stem field empty or DK/RF and goes into the unfolding, the min max value is not being updated at U020 and U021. It was discovered that the calculations only run according to the interviewer administered rules - Web allows empty at stem and the calculation does not run.</p> <p>Fix: Added "or web" to the condition for the unfolding calculation so that it will do the calculation for DK/RF or empty in web.</p>
6	V10	V652_	Problem: Added a probe to the "never, once or twice, monthly, weekly, or daily or almost daily" fields in V10.
4	V3	V202	<p>Problem: skip is not working correctly when the respondent responds 6, No One to SecV.MOD3.V200_.</p> <p>Fix: Fixed to skip correctly.</p>
9	V4	V701	Fixed an issue where respondents over the age of 90 were skipped over the module but erroneously got the intro.

DM Version	Section	Field Name	Summary
4	V7	V451	<p>Problem: Type needed to be changed for V451 through V458 to 0..100 and V459 needed to allow 3 decimal places.</p> <p>Fix: Revised Type for V451 through V458 to 0..100 and V459 now allows 3 decimal places.</p>
3	V7	V460	<p>Problem: Code was missing which is actually the correct answer.</p> <p>Fix: Added code 3: "They have the same chance"</p>
4	V9	V600	<p>Problem: respondent 90 and older are not supposed to be able to get in to module 9.</p> <p>Fix: Revised the ask age to <91</p>
4	V9	V605	<p>Added the following codes:</p> <ul style="list-style-type: none"> 6. Didn't plan ahead 7. Live day to day 8. School costs 9. Children's expenses 10. Have difficulty saving 11. Lost my job 12. Business downturn
10	V9	V615	<p>Problem: Added clarifying question before V615.</p> <p>Fix: Added new question about future social security benefits based on respondents work history, and modified some flow surrounding it.</p>
4	V9	V621_	<p>Problem: Code '1' at V621 needed to be changed to "Spouse or partner"</p> <p>Fix: Code '1' changed to "Spouse or partner".</p>
7	W	W311_IWMODE	<p>Problem: W311IwMode and W307 Wassist were being presented on screen to Web respondents but they are INTERVIEWER ADMINISTERED only.</p> <p>Fix: Adjusted code so that Web respondents don't see these questions.</p>
5	W	W314_W306	<p>Problem: A small number of respondents are still receiving social security permissions questions via telephone interviews, despite all respondents enhanced face to face assignments having been removed.</p> <p>Fix: Commented out the SS permissions block.</p>
2	W	W797_VBS	<p>Problem: Due to COVID-19, no VBS appointments will be scheduled at this time, so we need to comment out the VBS sequence (W797, W798, W802, W807, W801, W803, W806 and W808) for all languages.</p> <p>Interviewers will call participants at a later date to discuss VBS consent after it is safe and appropriate to do so.</p> <p>Fix: Commented out VBS</p>